



# Reference Manual

A compilation of help topics  
for people who use Volgistics  
to recruit, track, & coordinate volunteers.



There is also a Getting Started guide  
available at <http://www.volgistics.com/Assets/GettingStarted.pdf>  
for those just getting started with Volgistics.

Getting Started

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# Preface

## What's in this document?

This publication is provided for those who would like to have the Volgistics system documentation in a portable document file (PDF) format. It is a compilation of the Volgistics system *help topics* as they appeared on the date it was compiled.

## Visit <http://www.volgistics.com> for the most up-to-date help

The Volgistics system frequently grows to include new features and improvements. As it does, previously published documents such as this one may become outdated.

You can get the most up-to-date information on how to use Volgistics in the online help system. To access the online help system visit [www.volgistics.com](http://www.volgistics.com) and hover over Support on the menu at the top of the page, then click Get Help. Or, choose Help from the menu while you are logged-in to your Volgistics account.

## If you need more help

Volgistics is pleased to offer this Reference Manual and the entire online help system to those who use the Volgistics system. We hope you find these resources useful as you learn what Volgistics can do for your organization and how to use the system.

The online help system includes a way for you to ask questions.

If you have a question about Volgistics that you cannot find an answer to in the documentation, the Volgistics Team is pleased to answer it through the online help system. To post an inquiry, login to your Volgistics account and select Help from the menu. If you do not have a Volgistics account or you cannot login, visit [www.volgistics.com](http://www.volgistics.com) hover over Support on the menu at the top of the page, and then click Get Help.

All help inquiries are initiated online.

Collecting help inquiries online rather than by telephone enables Volgistics to route inquiries to the team member best qualified to answer; provide support during more hours of the day; answer inquiries more quickly; and ultimately keep the systems costs lower for everyone.

The Volgistics Team can often answer questions right away - often within just a few minutes. Inquiries that require further investigation or an engineer's attention may take longer; however inquiries are always answered by the end of the next business day.

While most organizations can easily get up-and-running with Volgistics on their own (Volgistics is designed for you to do this), some choose to ask others - such as their IT staff or a paid or volunteer consultant - to help them get started or organize for automation. If you choose to involve others as you get started, feel free to share this document and the Volgistics help system with them. The Volgistics Team can answer inquiries from these people too.

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# What to Do When a System Operator Leaves Your Organization

Help topic 1020

Added or revised 04-28-2014

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It's never an easy time when an employee or volunteer leaves your organization. Sometimes this can cause additional concerns when the individual also had credentials to login as a Volgistics **System Operator** [pg:0065]. In these cases, we recommend taking the following precautions to protect the integrity of your account.

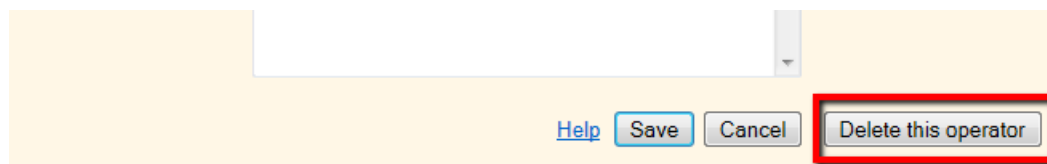
To make the changes shown in this help topic, the System Operator will need access to the **Setup** [pg:0887] page. If the operator that left was the only one with access to the Setup page, see **Help topic 2535** [pg:0084] for ideas to try. If you are still unable to change the needed information, you will need to contact Volgistics support and go through a verification process. Volgistics staff cannot simply provide login information to anyone who asks because the security of customer accounts must be maintained. Often you can gain access by trying the suggestions in the help topic and avoid needing to go through the verification process.

## Delete the System Operator's Credentials

The best way to prevent access to the system is to delete the record for the person who is no longer with your organization. In some cases, you may not want to delete the record because the individual may return after a disciplinary review or leave of absence. If this applies, you should follow the steps in the *Prevent Access for the System Operator* section of this help topic.

To delete an operator's credentials:

1. Select Setup from the **menu** [pg:0215].
2. Expand the System Operator link.
3. Select the operator's name from the list. If the name does not appear, the operator attempting to make the change has a Site selected on his or her record that does not match the other operator's Site. In this case, the change will need to be made by a System Operator that has access to "All Sites." **Help topic 2035** [pg:0092] explains more about how this works.
4. Click the **Delete this operator** button at the bottom right of the page then verify that you want to complete the action by clicking the **OK** button in the pop up window.



If the **Delete this operator** button does not appear as shown above, this operator is the only **Volgistics Administrator** [pg:0052] for your account. Because accounts must have at least one Administrator, you will need to do one of two things. One option is to change an existing operator's User Level by following steps 1 – 3 above for the operator you want to change. Then select "Volgistics Administrator" from the dropdown next to User level and click the **Save** button. Another option is to replace this operator's information with a new Administrator's information. **Help topic 2535** [pg:0084] shows how to do this.

When an operator's information is deleted it makes room for you to add an additional System Operator in its place. If you do not need to add another operator, you can lower your account's [Service Level \[pg:0719\]](#) to reduce your monthly service fee. [Help topic 2166 \[pg:0731\]](#) shows how to do this.

## Prevent Access for the System Operator

It is usually best to delete the record for the System Operator you want to prevent from accessing the system completely. To do this, follow the steps in the *Delete the System Operator's Credentials* section of this help topic. However, in some cases you may only want to temporarily prevent access. For instance, if the operator must undergo a disciplinary review or may be put on a leave of absence. In these cases, you can prevent the operator from logging-in to Volgistics without deleting his or her record completely.

Please note, if there are automatic reports setup to be run for this System Operator, these can give the appearance that the operator is still accessing the system. This is because the reports will still appear on the [In Box tab \[pg:1917\]](#) of your Volgistics Mailbox under the operator's name, and there will still be an entry on your [Event Log \[pg:0028\]](#) showing the report was run for the operator. These are caused by the automatic report being run, though, and do not mean that the operator actually logged in to do this. To change the report(s) to be run automatically under a different operator's name, change the settings on the Save tab of the report. [Help topic 2498 \[pg:0473\]](#) explains more about how to do this.

To prevent an operator from logging-in to Volgistics:

1. Follow steps 1 – 3 in the *Delete the System Operator's Credentials* section to get to the operator record you want.
2. Under the Rights heading, check the box next to "Block this operator's access to the system."

**Rights**

Block this operator's access to the system

Site:  (choose "All sites" except when site-level-access is desired)

User level:

3. Click the **Save** button.

## Update Other Operator's Passwords and Settings

In many office environments, there is the potential for System Operators to discover the login information for other operators. If you're concerned that the operator that left knows another operator's credentials, please follow these suggestions to make sure the operator cannot access the system using someone else's information.

### Update Passwords

If you're concerned about your account's security, the first thing you should do is review your account's password strength rules to make sure passwords are not easily guessed or hacked. It is also a good idea to make sure your operators must change their passwords on a regular basis. [Help topic 2236 \[pg:1442\]](#) shows how to check and change your account's password settings.

After you verify that your account uses secure password strength settings, you should make sure your operators have a different password than the one they used when the operator who left was still with your organization. To do this:

1. Follow steps 1 – 3 in the *Delete the System Operator's Credentials* section to get to the operator record you want.
2. If your operators login on a regular basis, check the box next to "Operator must change their password when they login next" to require them to choose a different password the next time they sign in. If your operators might not sign in regularly, or for additional security, you can change the operator's password for them. You can find additional help on this in [Help topic 1011 \[pg:1895\]](#).

Phone number: (555) 325-1110

Password: [Redacted]

Confirm password: [Redacted]

(Current password is case sensitive)

Operator must change their password when they login next

Time zone: (GMT-05:00) Eastern Time (US & Canada)

3. Click the **Save** button.

### Limit Internet Access

An additional security measure you could take if you're concerned that the operator that left could still access your account by using another operator's record is to limit the IP addresses your current operators can login from to those that are in your network. This would prevent the operator that left from being able use another operator's credentials to login from home or another location. To prevent possible lock outs, this restriction cannot be placed on operators that have the [Volgistics Administrator \[pg:0052\]](#) user level.

This option will only work if your organization has a fixed (or static) public IP address for Internet access. The settings for this are found under the Rights heading on each operator's System Operator page. Please see the *Computers* section of [Help topic 1011 \[pg:1895\]](#) for detailed directions on how to configure this. You may need to contact your IP department for additional help if you're unfamiliar with how this works.

### Monitor Event Log

Your account has an [Event Log \[pg:0028\]](#) that monitors important actions that occur in your account. Each time an operator logs in to Volgistics it will record the time, date and IP address for the action.

### Event Log

Next

11-28-2011 to Today

Date Time	Event	Description	Operator	Host
2012-02-29 2:07 p	Accessed Setup page		Volgistics Team	192.168.3.132
2012-02-29 2:07 p	Login		Volgistics Team	192.168.3.132
2012-02-29 6:17 a	Report run	All service by volunteer	Mary Smith	
2012-02-29 6:17 a	Report run	All service by volunteer	Mary Smith	
2012-02-28 10:24 a	Accessed Setup page		Volgistics Team	192.168.3.132
2012-02-28 10:23 a	Accessed Setup page		Volgistics Team	192.168.3.132
2012-02-28 10:23 a	Login		Volgistics Team	192.168.3.132
2012-02-07 2:36 n	Deleted application	Asdf Asdf	Volnistics Team	

You can use this to check if the operator who left has logged in recently, and to watch for unusual activity from existing operators. For example, if an operator logs in at a time he or she usually does not, or from an unrecognized IP address.

Please remember that if an operator has reports setup to run automatically that these will appear on the Event Log for that operator, but the operator did not need to actually login to the account in order for this to happen. It may appear that the operator is accessing the account when he or she is not because there will be an entry in the Event Log for the automatic reports being run. An operator cannot login to an account without creating an entry in the Event Log with "Login" as the event. So if you do not see this, you can be sure the operator has not logged in with his or her credentials.

To change the report(s) to be run automatically under a different operator's name, change the settings on the Save tab of the report. [Help topic 2498 \[pg:0473\]](#) explains more about how to do this.

To see the Event Log for your account:

1. Select Setup from the [menu \[pg:0215\]](#).
2. Expand the Account management link.
3. Select Event log.

### **Additional Considerations for VicNet**

If your account uses the [VicNet \[pg:1724\]](#) module, you should also check to make sure the operator that left does not have a [Coordinator \[pg:1922\]](#) or volunteer record that could be used to access the system.

If you find a record, you may want to just prevent VicNet access. For example if the operator was also a volunteer and you need to keep his or her service information for reports. Or if the operator may be returning, you may want to keep his or her Coordinator record so it does not need to be recreated. In these cases, you can prevent VicNet access by checking the Disabled box on the [Vic tab \[pg:1810\]](#) of the record. You may also want to block the Coordinator from receiving schedule alerts if they are setup for this by checking the 'No email' and the 'No text message' boxes on the Coordinator tab of their record.

If you're sure that you will no longer need the record, the best option is to delete it completely. To do this, click the

### **Delete**

button on the Core tab of the volunteer record, or the Coordinator tab of the Coordinator record. You can learn more about this in [Help topic 2309 \[pg:2016\]](#).

### **Additional Considerations for VicTouch**

If your organization uses the [VicTouch \[pg:1778\]](#) module, you may also want to change the VicTouch access code for your account. This would prevent the operator from starting the VicTouch module at a computer outside of your account and possibly entering false information.

To change your VicTouch access code:

1. Select Setup from the [menu \[pg:0215\]](#).
2. Expand the VicTouch link.
3. Select Ground rules.

4. Under the Startup heading, change the number after "Your VicTouch access code is." You should note your new number because you will need it later.

5. Click the **Save** button.

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## Account Statistics

Help topic 1051

Added or revised 02-14-2012

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For your convenience, Volgistics displays an 'Account Statistics' box on the Welcome screen. The statistics displayed here give you an overview of your volunteer database. The Welcome screen appears when you first login to Volgistics, or when you choose 'Welcome' from the [menu \[pg:0215\]](#).

The Account Statistics box includes:

### Volunteer records

The total number of volunteer records in your account. This count includes every volunteer record in your database no matter what the volunteer's status is. If you use [Site Level Access \[pg:0092\]](#) this count includes all volunteer records at all Sites.

### Archived volunteer records

The total number of volunteer records archived in your account. If you use [Site Level Access \[pg:0092\]](#) this count includes all volunteer records archived at all Sites.

### Cumulative hours of service

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## Event Log

Help topic 1112

Added or revised 09-02-2016

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It is sometimes useful for an organization to know when certain actions were taken in their Volgistics account. The Event Log can often provide this insight. Generally, events are logged only when they are related to system access and security; volunteer record operations; account management, and significant changes to [Setup \[pg:0887\]](#). Unfortunately, logging every single action in an account is not practical due to the additional processing and storage requirements this would introduce.

Starting from the most recent event in the account, the Event Log provides the date, time, event, a brief description, the [System Operator \[pg:0065\]](#) name under which the event was carried out, and the host IP address.

# Setup - Account Management

## Event Log

[Next](#)

09-13-2007 to Today

Date Time	Event	Description	Operator	Host
2007-11-29 2:06 p	Report run	Volunteer Profile 11	Volgistics Team	
2007-11-29 2:05 p	Login		Volgistics Team	
2007-11-29 2:05 p	Edited service record	4276603187	Volgistics Team	
2007-11-29 2:03 p	Changed system operator rights	Joe Smith	Volgistics Team	
2007-11-29 1:59 p	Report run	Volunteer schedule list	Volgistics Team	
2007-11-29 1:47 p	Login		Volgistics Team	

To view your account's Event log, take the following steps:

1. Choose [Setup \[pg:0887\]](#) from the menu.
2. Click on *Account management*.
3. Click on *Event log*.

### Older Event Log Entries

Because of the length Event Logs can grow to, Volgistics moves older entries off-line periodically. Account holders can still access the complete Event Log if needed, though, by writing to the Volgistics Team. If you need to see older entries, we require an [Administrator \[pg:0052\]](#) level [System Operator \[pg:0065\]](#) to request the older entries by submitting a help inquiry from the *Help E-mail* tab of the Volgistics mailbox. [Help topic 1027 \[pg:1902\]](#) shows how to do this.

Here is a list of events Volgistics tracks arranged by category. Please note that some of the events are no longer tracked, but have been included on the list in case you have an older account.

### Account Management

- Account SMS change: disabled (logged since 08-08-2014)
- Account SMS change: yes (logged since 08-08-2014)
- Account SMS change: yes with terms (logged since 08-08-2014)
- Change credit card information
- Changed billing date transaction
- Changed billing notice email address
- Changed service level transaction\*
- Cleared account
- Conversion cannot start - account is reset
- Conversion cannot start - old version
- Conversion completed
- Free trial extended
- Jump-Start conversion started
- Reset VicNet login count

- Reset VicTouch transaction count
- Service started transaction
- Switch to Automatic payments
- Switched to Pre-payments
- System email (automatic billing stopped)
- System email (billing reminder)
- System email (cancellation confirmation)
- System email (charge failed, 1st notice)
- System email (check received)
- System email (credit applied)
- System email (credit card expiration approaching)
- System email (grace period reminder)
- System email (on hold, 1st notice)
- System email (on hold, additional notice)
- System email (service expired)
- System email (transaction confirmation)
- System email (trial account sign-up)
- System email (trial expired)
- System email (trial expires soon)
- System email (VolunteerWorks credit applied)
- Too many charge failures for session
- Trial account created
- VolunteerWorks conversion started
- VolunteerWorks support renewed

### **Changed service level transaction\***

If the change to the service level was adding the [VicDocs \[pg:1648\]](#) module, the *Detail* column will include information that the following HIPAA Statement was accepted:

*"Because Volgistics is designed to track volunteer information, the system is not considered HIPAA compliant. Therefore your organization should not store HIPAA sensitive documents in VicDocs."*

### **Assignments & Scheduling**

- Assignment made inactive (logged since 06-06-2008)
- Assignment record deleted
- Changed automatic assignments
- Edited regular schedule
- Made automatic assignments retroactive
- Merged assignment records
- Merged place records
- Merged site records
- Moved assignment record
- Moved place records
- Place record deleted
- Removed schedule opening
- Site record deleted

### **Email, Vic Mail, Text & Other Messages**

- Changed email Sender ID rule
- Coordinator opted into text messaging (logged since 08-08-2014)
- Coordinator opted out of text messaging (logged since 08-08-2014)
- Email opt-out
- Operator opted into text messaging (logged since 08-08-2014)
- Operator opted out of text messaging (logged since 08-08-2014)
- Refresh email validity
- Reminder sent
- Reset email
- Sent message
- Sent schedule reminders for tagged records
- Sent VicNet password for tagged records
- System email (message to administrators)
- System email (unread help notice)
- Volunteer opted into text messaging (logged since 08-08-2014)
- Volunteer opted out of text messaging (logged since 08-08-2014)

### **Service Tracking**

- Auditing changed for operator
- Batch deleted
- Deleted service record
- Edited merit hour rule (logged since 01-10-2014)
- Edited service record
- Edited travel time rule (logged since 01-10-2014)
- Service measure cleared
- Service record auditing change

### **Setup Changes**

- Added holiday
- Application auditing turned off
- Changed account time zone
- Changed holiday
- Changed Rank by
- Changed You can choose
- Clear field
- Deleted application form
- Deleted Award item
- Deleted Characteristic field
- Deleted Checklist item
- Deleted field
- Deleted holiday
- Deleted Preference field
- Merged Award from
- Merged Award into
- Merged Checklist from
- Merged Checklist into
- Table entry merged or deleted

### **System Access & Security**



- Accessed Setup page
- Added System Operator
- Changed password
- Changed System Operator rights
- Changed VicTouch unattended startup password
- Changed VicTouch unattended startup permission
- Deleted System Operator
- Invalid login attempt
- Login
- Password request
- Sent forgotten VicNet password
- System email (return password)
- VicTouch started

### **Volunteer Record Operations**

- Added Assignment for tagged records
- Added date for tagged records
- Added Flag for tagged records
- Added history records from Tickler
- Added Mandate for tagged records
- Added Site to tagged records
- Application submitted (logged since 12-05-2007)
- Archived tagged records
- Change Status for tagged records
- Change Type for tagged records
- Changed Group to Individual
- Combined volunteer records
- Delete applications
- Deleted all archived records
- Deleted application
- Deleted application PDF (logged since 08-10-2016)
- Deleted archived records based on date archived
- Deleted archived records based on DOLA
- Deleted archived records based on Flag
- Pending application deleted
- Reset privacy default
- Restore all archived volunteers
- Restored deleted volunteer (logged since 03-03-2014)
- Status changed for deleted status date (No longer tracked)
- Status changed for new status date (No longer tracked)
- Volunteer name changed (Done through VicNet if *Operator* column is blank)
- Volunteer record deleted
- Volunteer record marked for delete (logged since 03-03-2014)
- Volunteer record shared

### **Other**

- Deleted IP registration
- Deleted report
- Deleted In Box report (logged since 09-01-2016)
- Deleted Set record
- Edited Set record (logged since 11-03-2012)

- Registered IP for VicTouch
- Report run
- SMTP error

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## Characteristic Fields

Help topic 1156

Added or revised 11-17-2016


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Characteristic fields are versatile fields that can be used to track useful information about volunteers and/or Assignments. An example of information that is frequently tracked with a characteristic field is skills. A characteristic field such as "Skills" can be added to the Profile tab in a volunteer record, the Profile tab in an Assignment record, or both.

When a characteristic field is established for both the volunteer record and the Assignment record, the field can be used to [match volunteers and Assignments \[pg:0899\]](#). When it is created for the volunteer record alone, it can be used to track information about the volunteer only. Likewise, when it is created for the Assignment record alone, the characteristic field can be used to track information about the Assignment only.

When [creating a Characteristic field \[pg:0938\]](#), the user must decide whether "Just one" (item) or "As many (items) as you want" can be chosen for that field, and they must then define the items that will be options under this field. In the example of Skills, it would be practical to allow "As many as you want" to be selected, and then items ("Accounting," "Grant Writing," "Data Entry" and "Public Speaking," for example) might be entered as Skills items.

Once a characteristic field has been created, it can be used for tracking purposes. Open either the Assignment or volunteer record, and go to the Profile tab. Indicate which skills are required for the Assignment, or which skills a volunteer has, by marking the box(es) next to the appropriate skills on the Profile tab. The image below illustrates a "Skills" box on the Profile tab for an Assignment that requires Data entry skills.



Skills		
<input type="checkbox"/> Accounting	<input checked="" type="checkbox"/> Data entry	<input type="checkbox"/> Grant writing
<input type="checkbox"/> Public speaking		

If you have chosen to track the field in both volunteer and Assignment records, the same Skills box will also appear in each volunteer record. Indicate that a volunteer has specific skills by marking the relevant boxes in his or her record.

### Related help

[Help Topic 2208 \[pg:0878\]](#) - Their Characteristics Set Rule

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## Service Values

Help topic 1162

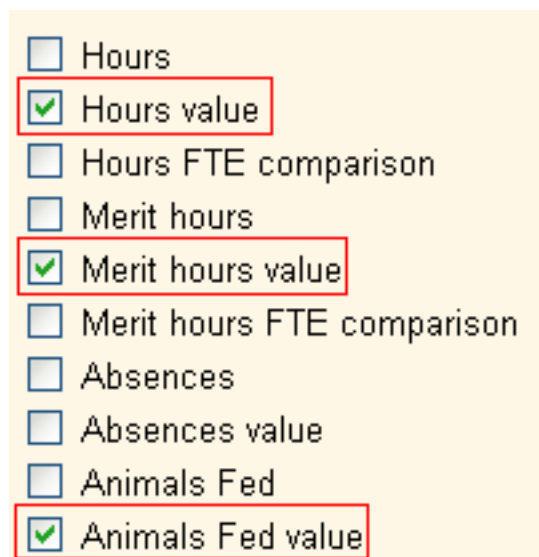
Added or revised 09-23-2016

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While many organizations' needs are met by simply tracking volunteer hours, some organizations must also track and report on the monetary value of their volunteer programs. The service values feature allows you to attribute monetary value to volunteer service in Volgistics. Service values can be given to actual hours, [merit hours \[pg:1564\]](#), and/or any [service measures \[pg:1557\]](#) used by an organization.

First, a default rate can be set for actual hours, merit hours and any service measures. Then different default rates can be set for different time periods. In addition, the service values for actual hours, merit hours and other service measures can vary by Assignment.

After [setting up service values \[pg:1413\]](#), the monetary value of service will be included in all appropriate service records. It can be included in service reports by selecting the "Value" field for any relevant measures (for example, Hours, Merit hours, Absences, etc.) on the report's Fields page, like this:



A screenshot of a web interface showing a list of checkboxes for selecting fields in a report. The items are: Hours, Hours value, Hours FTE comparison, Merit hours, Merit hours value, Merit hours FTE comparison, Absences, Absences value, Animals Fed, and Animals Fed value. The checkboxes for 'Hours value', 'Merit hours value', and 'Animals Fed value' are checked and highlighted with red boxes.

<input type="checkbox"/>	Hours
<input checked="" type="checkbox"/>	Hours value
<input type="checkbox"/>	Hours FTE comparison
<input type="checkbox"/>	Merit hours
<input checked="" type="checkbox"/>	Merit hours value
<input type="checkbox"/>	Merit hours FTE comparison
<input type="checkbox"/>	Absences
<input type="checkbox"/>	Absences value
<input type="checkbox"/>	Animals Fed
<input checked="" type="checkbox"/>	Animals Fed value

### What monetary amount should I give for the service value?

It is ultimately up to each organization to decide the monetary value of the jobs that volunteers perform. If you have a large organization, this is something the Board of Directors or Human Resources department may be able to assist with. You could also look on the web for assistance. For example, Independent Sector (a Washington, D.C. based advocacy coalition) announced the U.S. average for volunteer service value was \$23.56 per hour in 2015. The group also releases averages for each State. You can learn more about this group's figures at [https://www.independentsector.org/volunteer\\_time](https://www.independentsector.org/volunteer_time).

### Related help

[Help Topic 1163 \[pg:1413\]](#) - How to Setup Service Values

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## How to send VolunteerWorks data to Volgistics for conversion

Help topic 1196

Added or revised 02-14-2013

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If you currently use VolunteerWorks version 3, you can use VolunteerWorks to convert your data to Volgistics yourself, or Volgistics can convert your VolunteerWorks data files into your Volgistics account for you at no cost.

If you would like Volgistics to convert your VolunteerWorks data files for you, please visit the following URL address:

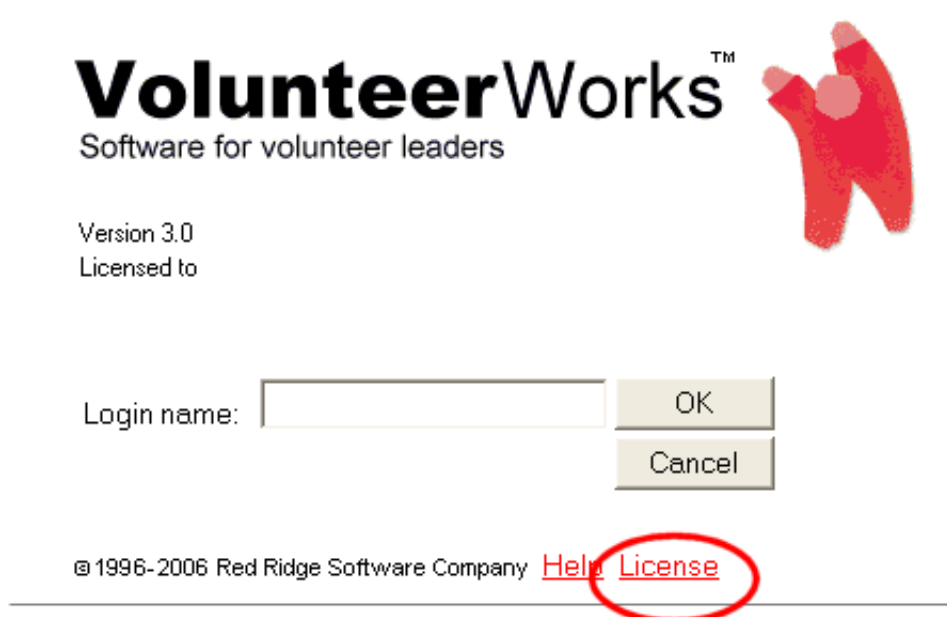
<https://www.volgistics.com/volunteerworks-request.htm>.

This help topic explains how to complete the first step of uploading your data in more detail than the web page does. After this is done, you will still need to complete step 2 to complete your request.

### Make a backup in VolunteerWorks

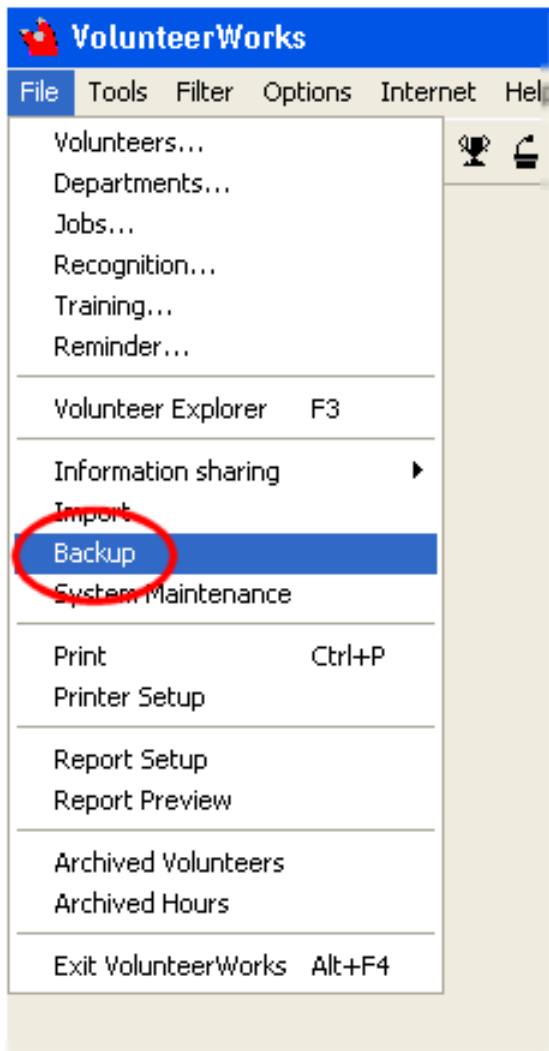
In order to send your VolunteerWorks to Volgistics for conversion you will need to make a backup of your VolunteerWorks data files like this:

1. Start VolunteerWorks on your computer as you do normally. Before you login to VolunteerWorks, click the License link in the Login dialog box to determine your VolunteerWorks serial number (you'll need this to complete your VolunteerWorks data conversion).



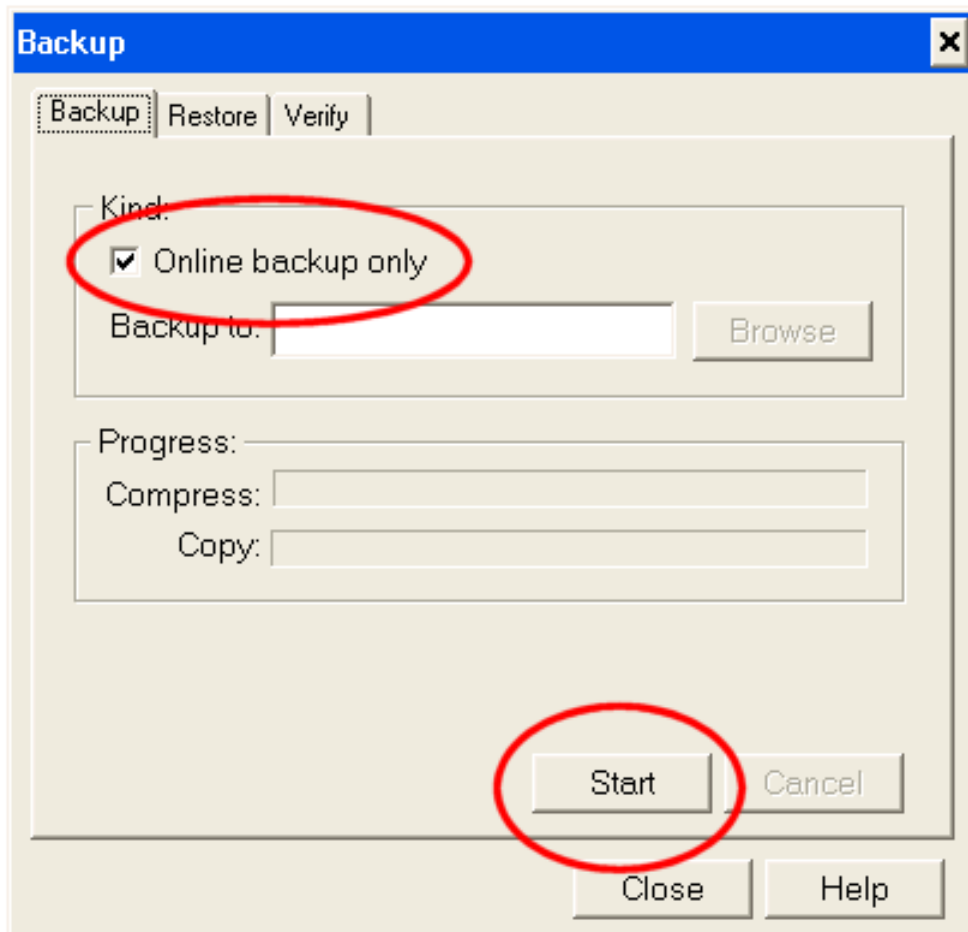
Your VolunteerWorks serial number appears at the bottom of the *Software license* dialog box. Make a note of your serial number, close the *Software license* dialog box, and then login to VolunteerWorks normally.

2. Select the File menu in VolunteerWorks and then choose "Backup."

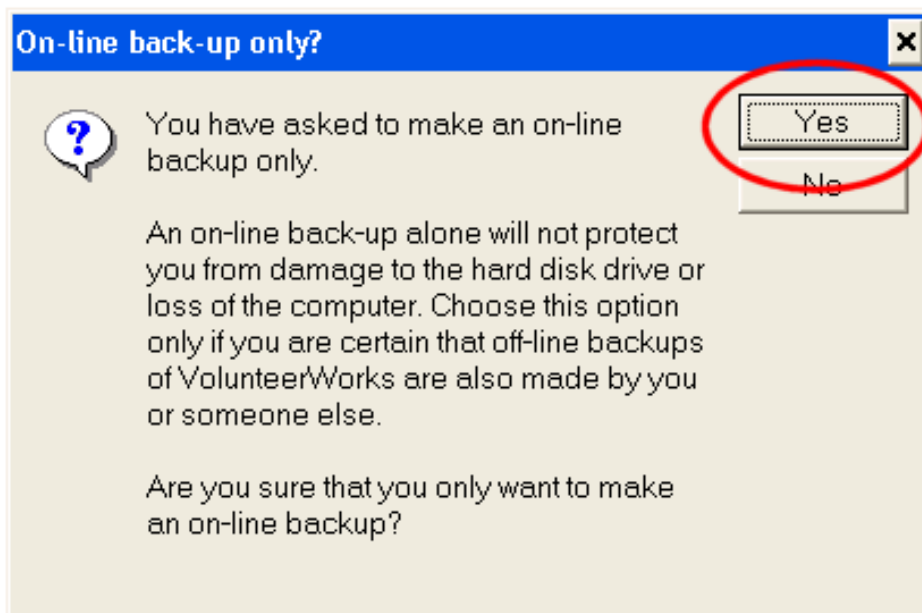


If you receive a message that others are using the database, simply click **OK**. It is fine to make a backup while others are using the data.

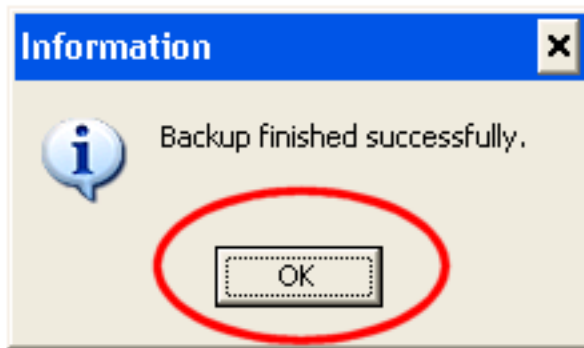
3. In the Backup dialog box, check "Online backup only" and then click the **Start** button.



4. An "Online backup only?" confirmation box will appear. When it does, click the **Yes** button to start making the backup.



5. When the backup is complete, an information message will appear letting you know that the "Backup finished successfully." When you see this message click the **OK** button.



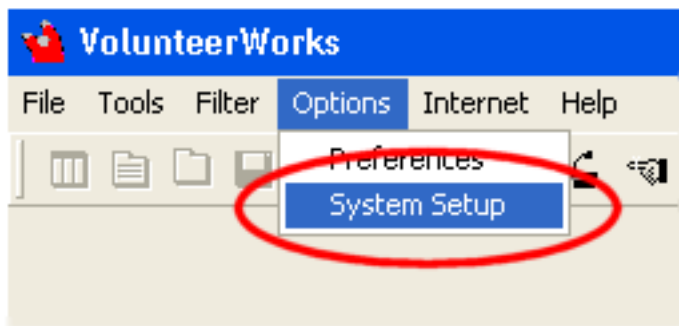
A copy of your VolunteerWorks data files has now been made and you're ready to upload that copy to Volgistics for conversion.

### **Send your data from within VolunteerWorks**

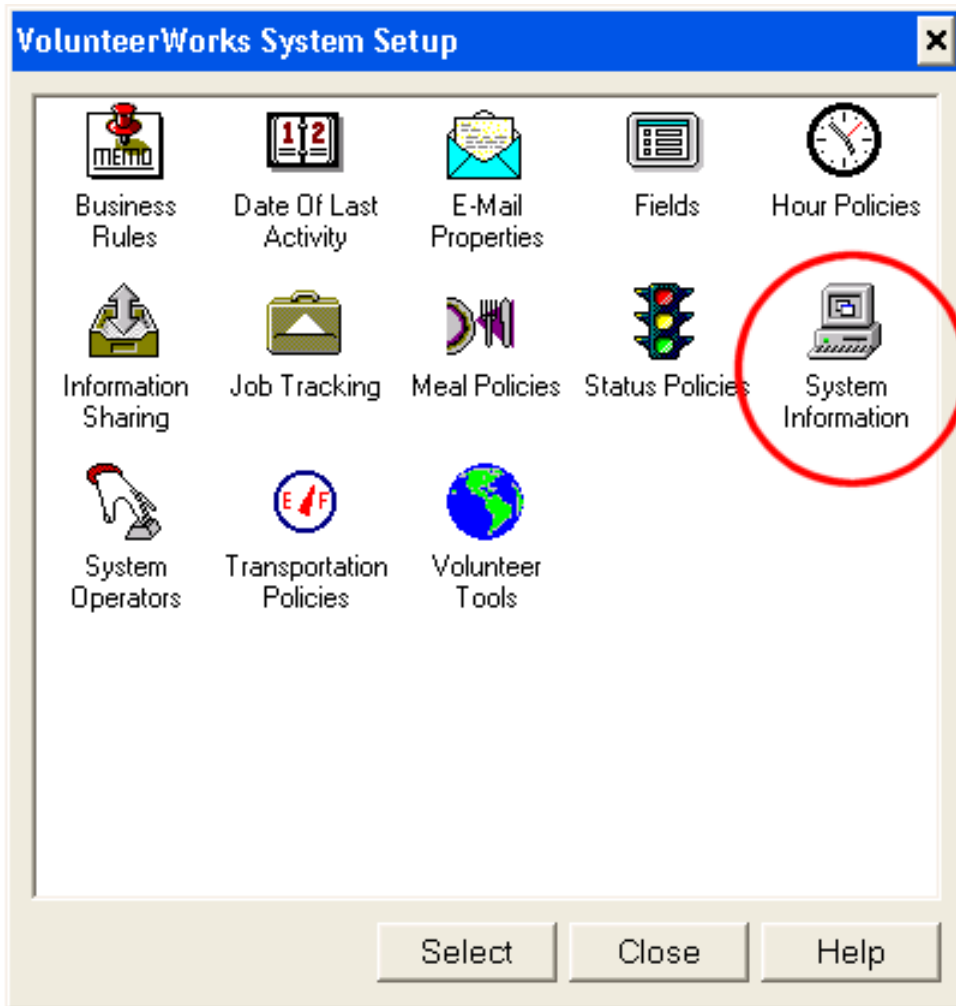
If you have an Internet connection from a computer where you can start VolunteerWorks, the easiest way to send your data for conversion is from within VolunteerWorks. The following steps show how to do this.

In some cases an organization's firewall may prevent VolunteerWorks from connecting to the Volgistics system. If this happens to you, follow the instructions in the *Upload your data from your web browser* section below.

1. Select the Options menu in VolunteerWorks and then choose "System setup."

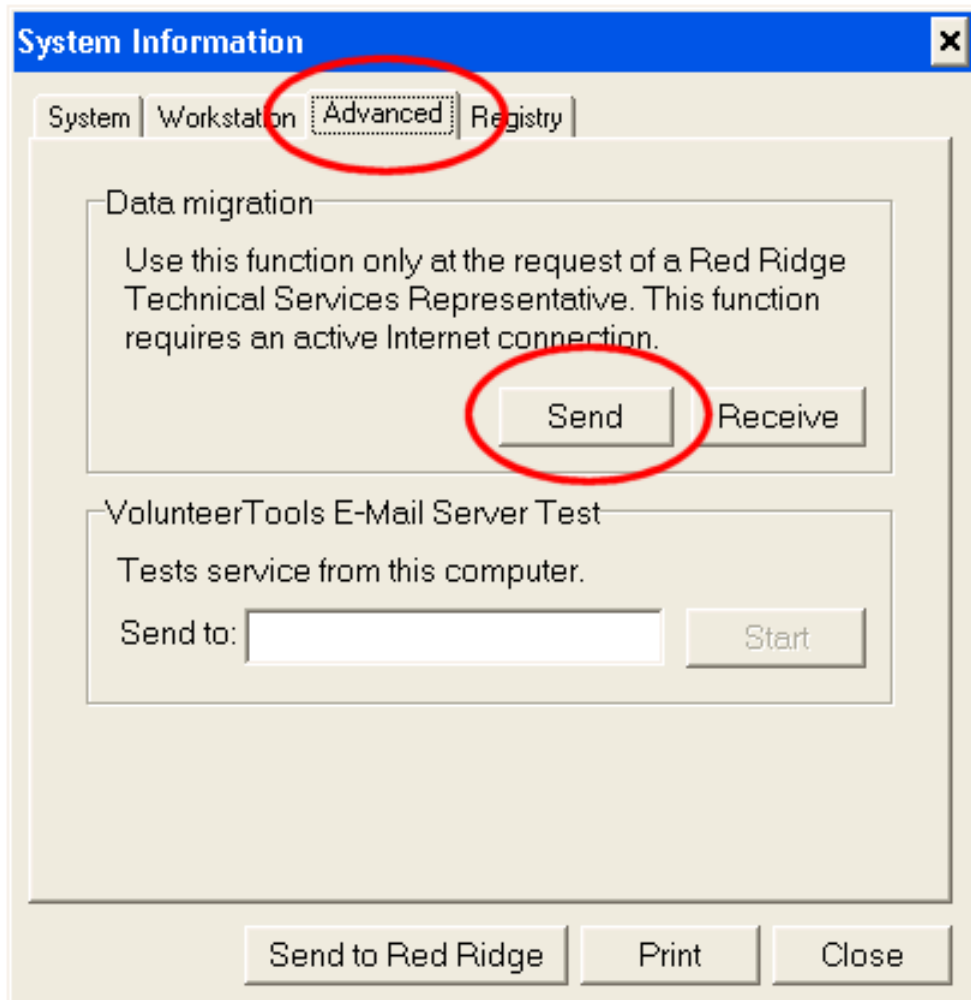


2. Double click "System Information" in the VolunteerWorks System Setup dialog box.

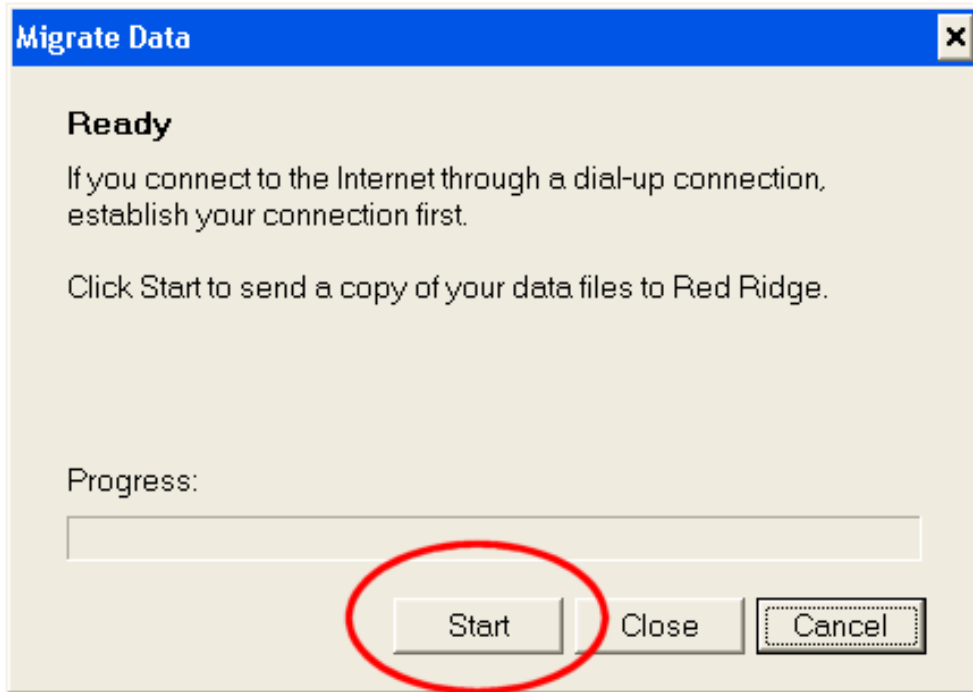


3. In the System Information dialog box, select the Advanced tab and then click the **Send** button under *Data migration*. (If your System Information box does not include a *Data migration* box, close VolunteerWorks and follow the instructions in the *Upload your data from your web browser* section below.)

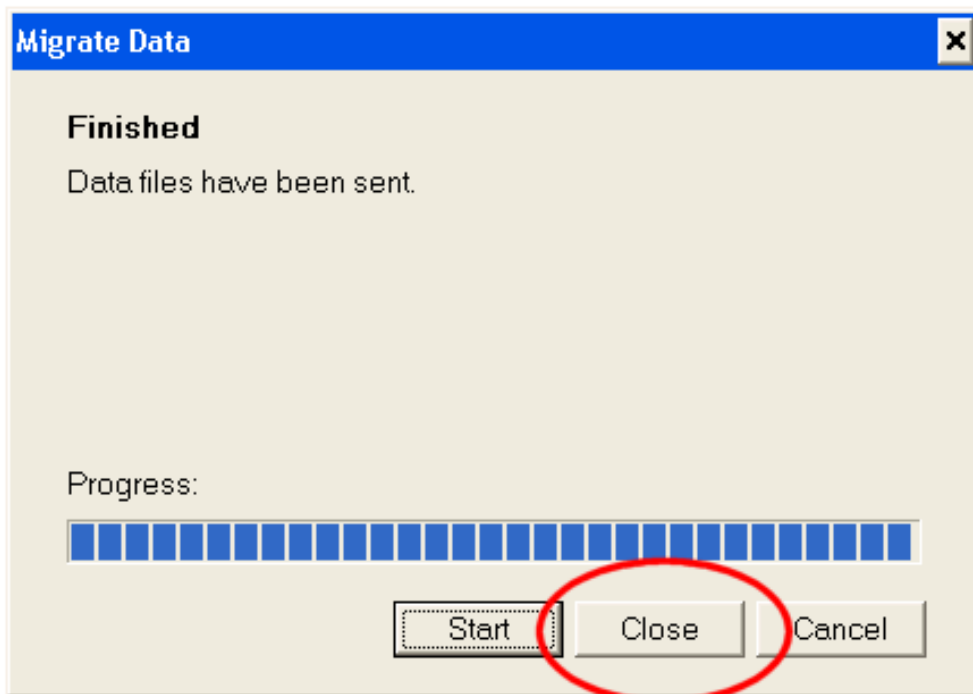




4. In the Data migration dialog box, click the **Start** button to start the file transfer.



If the file transfer is successful, you will see the Finished message shown below. Click the **Close** button and the file transfer is now complete.



If you receive an error message of any kind and you do not see the Finished message shown above, it means that VolunteerWorks cannot connect to the Volgistics system from your computer. In this case, simply close VolunteerWorks and follow the instructions in the *Upload your data from your web browser* section below.

## Upload your data from your web browser

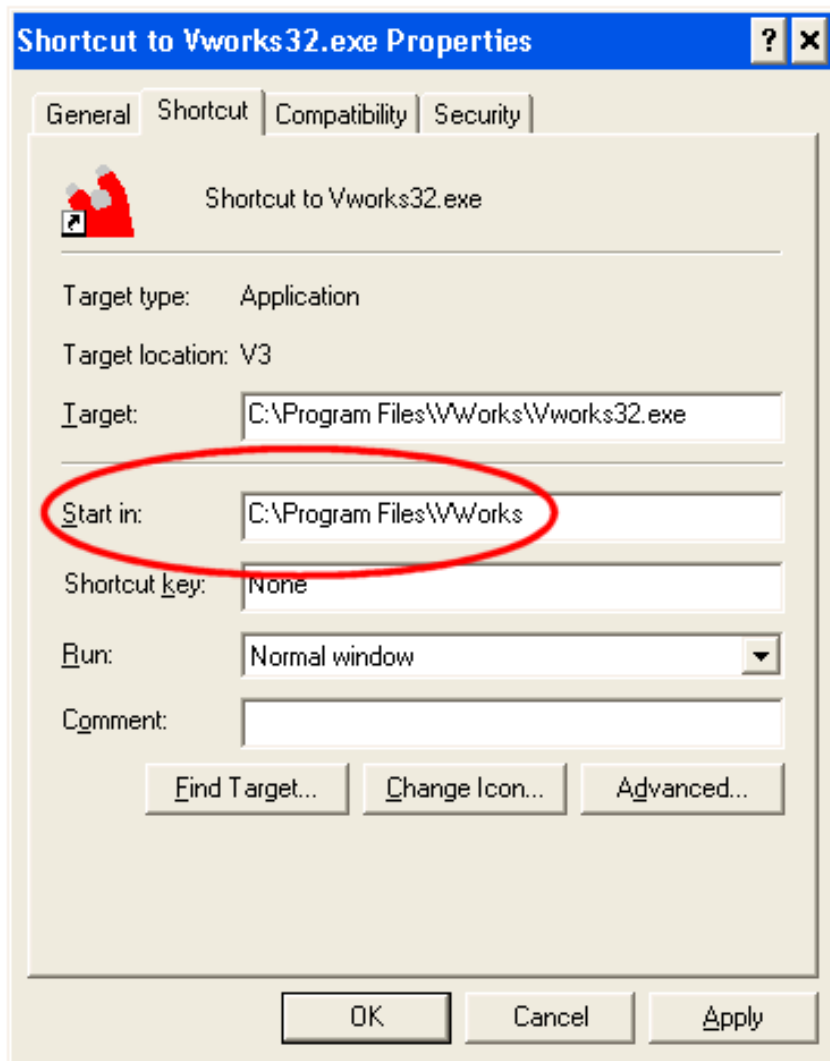
If you cannot use VolunteerWorks to transfer your VolunteerWorks data as described above, you can transfer the data using a web browser instead. Here's how:

1. Complete Step number 2 (Submit your request) at <https://www.volgistics.com/volunteerworks-request.htm>. It is not necessary to complete Step 1.
2. Right click the VolunteerWorks shortcut on your computer's desktop and then choose Properties from the pop-up menu.



**Right-click on your VolunteerWorks desktop shortcut**

3. Your shortcut Properties dialog box should have a "Start in" or "Location" field. This shows you the name of folder where your VolunteerWorks program is installed (e.g. "C:\Program Files\VWorks"). Make a note of this folder name and then close the shortcut properties box.



4. Open your web browser and go to this web page: <https://www.volgistics.com/VolunteerWorks-Upload.htm>.
5. Enter your VolunteerWorks license (serial) number in the *VolunteerWorks file upload box* as shown below. Step 1 in the *Make a backup in VolunteerWorks* section above shows how to find your serial number.

## VolunteerWorks File Upload

1. Enter your VolunteerWorks serial number.

VolunteerWorks serial number:

2. Click the **Browse** button and then select the VWDATA.BAK file from the VolunteerWorks directory on your computer or network. This folder is labeled VWORKS by default, but may be named something different on your computer.

File:

3. Click the **Send** button to start the transfer.

Once you start the transfer, do not close your browser until you receive a file *Upload Confirmation*. Closing your browser or Internet connection before you receive this confirmation will cancel the transfer.

Click Send to start the transfer:

6. Click the **Browse** button in the *VolunteerWorks File Upload* box. This will open a *Choose the file to upload* dialog box on your desktop. Use this dialog box to locate the folder you noted in step 2 above. This will be the folder that contains your VolunteerWorks program files.

7. Select the file from this folder named **VWDATA.BAK**. If you do not have a file named VWDATA.BAK, select the file named **VWAUTO.BAK**.

8. Click the **Send** button in the *VolunteerWorks File Upload* box to send the file. This will upload your VolunteerWorks data to Volgistics for conversion.

### Related help

[Help Topic 2006 \[pg:0047\]](#) - Frequently Asked Questions about Converting from VolunteerWorks to Volgistics

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## Forget your password? (System Operators)

Help topic 1306

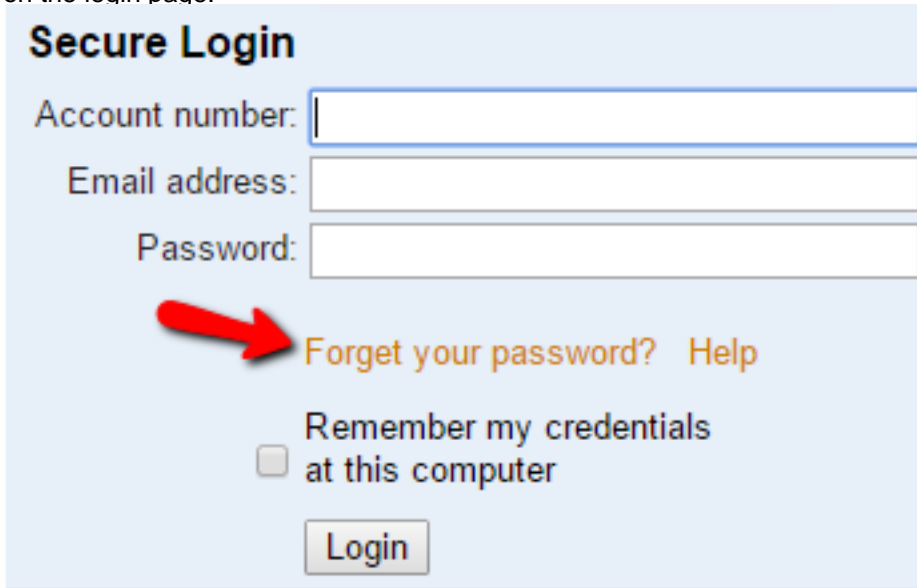
Added or revised 04-26-2016

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For security, Volgistics requires three pieces of information when you [login \[pg:0220\]](#) to your Volgistics account. These are the account number, the operator's email address, and the operator's password. If you are having trouble logging-in, we recommend double checking that the email address and account number are correct. If they are, the problem is with the password being entered. *This help topic is designed to show [System Operators \[pg:0065\]](#) how to reset the password they need to login to Volgistics.*

1. Click the *Forget your password?* link

If you have forgotten the password you use to login to Volgistics, start by clicking the *Forget your password?* link on the login page.



**Secure Login**

Account number:

Email address:

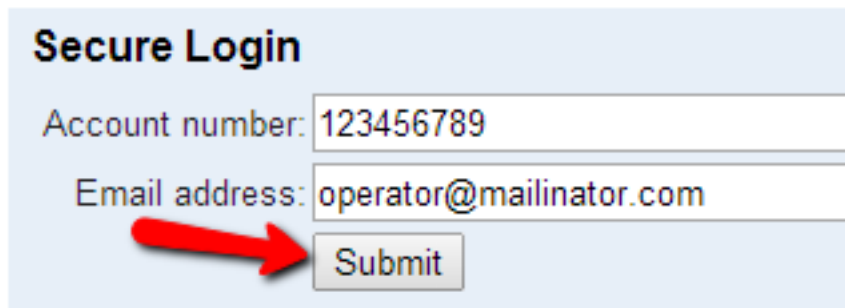
Password:

[Forget your password?](#) [Help](#)

Remember my credentials at this computer

## 2. Enter your account number and email address, then click the Submit button

Enter your account number and the email address you use to login to Volgistics, and then click the **Submit** button. The email address entered must match the email address on the [System Operator page \[pg:1895\]](#) of your operator record in order for the email to be sent. The system will send a link you can use to set a new password to your email address. **Please note:** The link will only remain active for 24 hours after it is sent. If you click the link and it says it expired, simply go back and click the *Forget your password?* link again.



**Secure Login**

Account number:

Email address:

## Don't have an account?

You can sign up for a free 30-day trial and start receiving...

If you receive a message saying you are not authorized to change your password, it means the [Administrator\(s\) \[pg:0052\]](#) of the Volgistics account has setup your operator record so you are not able to change the password on your own. In this case, you will need to contact the Administrator to either have your password reset, or to find out what the password is currently set to.

## 3. Sign-in to your email account to set your password

Go to the email account that the password was sent to, sign-in, and check for new messages. You should receive the password message within a few minutes. However, some email systems and ISPs may delay the delivery of email messages.

The passwords are sent from team@volgistics.com. If you do not see the message in a few minutes and your email program uses a spam filter, check the junk mail or spam folder for the message. If you do not see it, adjust your filter to allow messages from team@volgistics.com or add team@volgistics.com to your safe sender list.

When you receive the message, click the link in the message to set your password. If for some reason you cannot click the link, highlight the URL address beginning with *https://*. . . Once the complete address is highlighted, copy it and then paste it into a new web browser window.

You will see a screen that looks similar to the one below:

---

**Welcome Alexandra Call**

Please enter your new password.

New Password:

Confirm Password:

---

Enter a new password into both the

*New Password*

and the

*Confirm Password*

fields, and then click the

**Submit**

button. The new password you enter must be different than your previous password, *and* it must meet any password strength rules set by your account's [Administrator\(s\)](#) [pg:0052].

Remember the new password you enter because this is what you will use to login to Volgistics the next time you access the account.

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# Frequently Asked Questions about Converting from VolunteerWorks to Volgistics

Help topic 2006

Added or revised 02-14-2013

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Answers to frequently asked questions about converting from VolunteerWorks to Volgistics.

## **Q. How do I convert from VolunteerWorks to Volgistics?**

**A.** If you have VolunteerWorks version 3, you can use VolunteerWorks to convert your data to Volgistics yourself whenever you choose. Or if you'd prefer, Volgistics can convert it for you at no extra cost.

For step-by-step instructions and more information visit  
<https://www.volgistics.com/VolunteerWorks-Conversion.htm>.

## **Q. Will running the conversion to Volgistics change anything in my VolunteerWorks database?**

**A.** No. Running the Conversion Utility to copy your data from VolunteerWorks into Volgistics will not change any of the information you have in VolunteerWorks. The Conversion Utility simply reads the information from your VolunteerWorks database and inserts a copy of it into your Volgistics account.

If you want to run the conversion to see how your data will look in VolunteerWorks before you "go-live" with Volgistics, you can convert your data and then continue using VolunteerWorks while you're testing Volgistics. When you're ready to switch to Volgistics, you can clear your Volgistics account and run the conversion from VolunteerWorks again to get the latest copy of your VolunteerWorks database.

## **Q. Can I run the conversion from VolunteerWorks to Volgistics more than once?**

**A.** Yes, you can run the conversion more than once if you ran the conversion initially to see what your data will look like in Volgistics while you continued to use VolunteerWorks. When you're ready to make the switch, you can run the conversion again to get the latest copy of your VolunteerWorks database.

## **Q. Can I convert just some of the volunteer records I have in VolunteerWorks?**

**A.** Yes. You can tag selected records and then convert just the tagged records. Or you can convert all of the records with a particular status, such as just the Active volunteers, or all of the volunteers except the Inactive volunteers.

When you start the Volgistics Conversion Utility, you are asked if you want to convert just the tagged records, or just the records with certain statuses.

## **Q. Can I convert some volunteer records from VolunteerWorks now, and other volunteer records later?**

**A.** Converting selected volunteer records initially, and then converting other volunteer records later is not recommended.

Here's why: When you run the conversion, the conversion utility makes sure that your Volgistics account has all of the [Assignments \[pg:0096\]](#); reminder items (called [Checklist \[pg:0142\]](#) items in Volgistics); [awards \[pg:1551\]](#); and look-up table ([dropdown list \[pg:0963\]](#)) entries that exist in VolunteerWorks--no matter which volunteer records you're converting.



Therefore, if you make any changes to Assignments (such as [reorganizing \[pg:0112\]](#) or [renaming \[pg:0135\]](#) them); awards; Checklist items; or look-up table (dropdown list) items in Volgistics after you run the conversion for the first time and then attempt to run the conversion again, the system will again add the original Assignment names, awards, checklist items, and look-up tables (dropdown lists) back into your Volgistics account from VolunteerWorks.

**Q. Can I convert the archived volunteer records from VolunteerWorks?**

**A.** You can convert any volunteer records that are currently archived in VolunteerWorks if you choose. When you start the Volgistics Conversion Utility you are asked if you want to convert your archived records.

If you choose to convert your archived volunteer records they will convert directly into the [archived \[pg:1817\]](#) record storage in Volgistics. Meaning they will still be archived in Volgistics if they were archived in VolunteerWorks.

**Q. If I convert my VolunteerWorks data into Volgistics, can I later move it back to VolunteerWorks?**

**A.**

There is not a data Conversion Utility that moves data from Volgistics into VolunteerWorks. For this reason you should determine that Volgistics suits your needs before you convert from VolunteerWorks and begin using Volgistics. Volgistics [trial accounts \[pg:0224\]](#) are free, and you can run a test conversion of your VolunteerWorks data into your Volgistics trial account to see how things work before you decide to make the switch.

**Q. What should I do if I get error 10060 or 10061 when I run the Conversion Utility?**

**A.** These error messages mean that your computer or network firewall prevents the VolunteerWorks program from connecting to the Internet, which it needs to do to copy your data to Volgistics.

Ask the person who maintains your computer or network firewall to be sure the VolunteerWorks program (VWORKS32.EXE) has permission to access the Internet. Once you do this you should be able to run the Volgistics Conversion Utility from within VolunteerWorks.

If these steps do not resolve the problem, you can [ask Volgistics to convert \[pg:0035\]](#) your VolunteerWorks data for you. There's no charge for this service.

**Q. What should I do if the Conversion Utility appears to start, but never reports any progress even after several minutes?**

**A.** 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 <https://www.volgistics.com> from the computer where you're running the conversion. If you cannot connect to [www.volgistics.com](https://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>. Also, confirm that the VolunteerWorks program (VWORKS32.EXE) has permission to access the Internet.

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.

Then 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, you 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.

If these steps do not resolve the problem you can [ask Volgistics to convert \[pg:0035\]](#) your VolunteerWorks data for you. There's no charge for this service.

#### **Q. Is my data secure when I use the Volgistics Conversion Utility in VolunteerWorks?**

**A.** The Volgistics Conversion Utility uses SSL to encrypt all of your information as it is copied into your Volgistics account (unless you choose to disable SSL in the connection settings). This is same level of security used to protect online banking and credit card transactions.

Once your data reaches your Volgistics account it is protected by the Volgistics system security. You can learn more about Volgistics security at <https://www.volgistics.com/security.htm>.

#### **Related help**

[Help Topic 1196 \[pg:0035\]](#) - How to send VolunteerWorks data to Volgistics for Conversion

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# Adding VicNet, VicTouch or VicDocs to Your Account's Service Level

Help topic 2007

Added or revised 02-11-2016

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This help topic includes step-by-step instructions on how to add one, or more, of the Volunteer Information Center (Vic) modules to your account's [service level \[pg:0719\]](#).

The VicNet, VicTouch and VicDocs modules are all optional. You can use Volgistics without any of the Vic modules. Or, depending on your needs, you can choose to use all of the modules, or just one or two.

[VicNet \[pg:1724\]](#) is the module volunteers use to interact with Volgistics from any Internet connected computer.

[VicTouch \[pg:1778\]](#) is the module that provides an on-site touchscreen system for volunteer interaction and time clock features.

[VicDocs \[pg:1648\]](#) is the module that enables you to upload electronic document files to [volunteer \[pg:1849\]](#); [Coordinator \[pg:1922\]](#); and [Site, Place & Assignment \[pg:0096\]](#) records.

All of the modules are included free in 30 day trial accounts. Trial accounts can select to include the modules when they [start their service \[pg:0226\]](#). Organizations with paid accounts can test the VicNet and VicTouch modules on a limited basis without adding them to their service level. [Help topic 2534 \[pg:0082\]](#) explains how this works. The VicDocs feature that saves a [PDF \[pg:0449\]](#) copy of an applicant's completed [application form \[pg:0413\]](#) is available in paid accounts even if VicDocs is not included in the account's service level.

If you have a paid account and you want to add one or more of the modules to your service level, follow the steps below:

## **First, check to make sure the modules are not already part of your service level.**

If you have access to the [Setup \[pg:0887\]](#) page in Volgistics, you can do this by:

1. Login to Volgistics and choose [Setup \[pg:0887\]](#) from the menu.
2. Choose *Account management*.
3. Choose *Account status*.
4. Under *Service Level*, look for *Include VicNet*, *Include VicTouch* and *Include VicDocs*. It will say *Yes* next to these if a module is already part of your account's service level. It will say *No* if the module is not currently part of your account's service level.

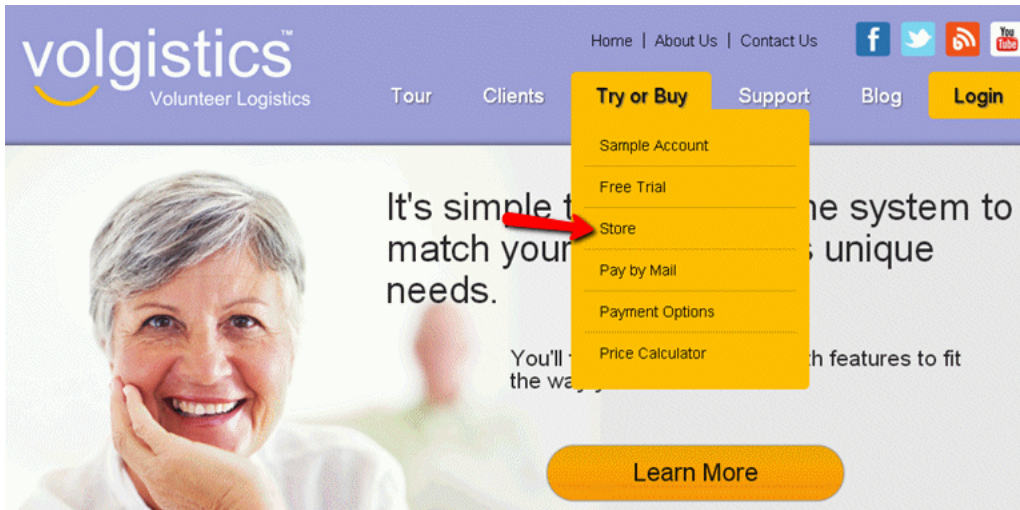
You can also do this through the Volgistics Store by following the login directions below and clicking the *Account status* link once you have signed-in.

## **If you found that the module(s) you want is not already part of your service level, the next step is to add the module(s) you need.**

You do this through the Volgistics Store by:

1. Visit [www.volgistics.com](http://www.volgistics.com).


2. Hover over *Try or Buy* in the menu at the top of the page and select Store.



3. Enter your Volgistics account number and your account credentials. Your account credentials may be either a [Volgistics Administrator's \[pg:0052\]](#) login name and password, or your account's [accounting access code \[pg:0728\]](#).

4. Click the *Change service level* link.

## Store Options

- [Account status](#)
- [Create an invoice and extend your service \(make another pre-payment\)](#)
- [Switch payment method to Automatic payment](#)
- [Order and payment history](#)
- [Change service level](#) 
- [Change billing contact email address](#)

[Exit Store](#)

5. Select the Yes option for the Vic modules you want to add\*. At this point you will see what your new service fee will be. If you are ready to make the change to your service level, click the **Continue** button. Click the **Cancel** button if you do not want to change your service level at this time.

**Change service level to:**

Volunteer records: up to  [Details](#)  
Archived volunteer records: up to  [Details](#)  
System operators: up to  [Details](#)

Include VicNet:  Yes  No [Details](#)  
Include VicTouch:  Yes  No [Details](#)  
Include VicDocs:  Yes  No [Details](#)

Monthly service fee: **\$ 96.00**  
(That's \$ 3.15 a day)

New expiration date will be: **Monday, September 26, 2016**

Click Continue to confirm a change to your service level, or Cancel to exit without changing your service level.

If you increase your service level and your account is set up for Automatic payments, Volgistics charges your account a prorated amount to cover the additional service fees for the remainder of the current billing period. Thereafter your account is charged the new monthly service fee.

If your account is setup for Pre-payment and you increase your service level, Volgistics adjusts your account's expiration date based on the new daily service fee. You will get a message regarding the new paid through date when you update your service level.

**\*Adding VicDocs**

If the change to the service level includes adding the [VicDocs \[pg:1648\]](#) module, a pop-up window will appear with the following statement:

*"Because Volgistics is designed to track volunteer information, the system is not considered HIPAA compliant. Therefore your organization should not store HIPAA sensitive documents in VicDocs."*

You must indicate your agreement with this statement to add VicDocs.

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## Volgistics Administrator

Help topic 2025

Added or revised 03-31-2017

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Volgistics includes certain administrative functions such as customizing the system, setting standards for the way you collect and store volunteer information, authorizing others to use the system, and controlling how much access individual users have. Since these administrative tasks can have far reaching effects on your important volunteer data, it's best if a single person (or just a few people) perform them in your organization.

The Volgistics Administrator is a [System Operator \[pg:0065\]](#) who oversees these administrative tasks. The Volgistics Administrator has access to all of the Volgistics [Setup \[pg:0887\]](#) features.

You can determine who the Volgistics Administrator is for your organization like this:

1. Choose Help from the [menu \[pg:0215\]](#).
2. Click "Operator Information."
3. The Operator Information window lists your organization's Volgistics Administrator(s).

#### Who should the Volgistics Administrator be?

The Volgistics Administrator is usually the volunteer coordinator or someone they designate. The Volgistics Administrator does not need to be someone from a computer or information services department, although it can be if this is appropriate for your organization. The Volgistics Administrator should be someone familiar with your organization's volunteer efforts, objectives, and policies. If you are the only person who uses Volgistics in your organization, the Volgistics Administrator should be you.

Every Volgistics account must have at least one Volgistics Administrator (Volgistics enforces this when you setup or change System Operators). You can optionally designate more than one Volgistics Administrator also.

The person who initially signs-up for a Volgistics account specifies the name, email address, and password for your organization's Volgistics Administrator. The initial Volgistics Administrator may either retain administrator rights for themselves, make other System Operators Volgistics Administrators also, or transfer the Volgistics Administrator right to another System Operator (accomplished by setting another System Operator's *user level* to "Volgistics Administrator"). For more information about user levels, see [help topic 2028 \[pg:0053\]](#).

Since the Volgistics Administrator right is controlled by your organization, the Volgistics Team at [www.volgistics.com](#) does not assign or control who the Volgistics Administrator is for your organization, and they cannot give administrator rights to a Volgistics user who does not currently have that right.

#### **Related help**

[Help Topic 1011 \[pg:1895\]](#) - System Operator Page

[Help Topic 2028 \[pg:0053\]](#) - How to Limit Operator Rights or Access

[Help Topic 2205 \[pg:0065\]](#) - System Operator

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## **How to Limit System Operator Rights or Access**

Help topic 2028

Added or revised 03/31/2017

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In Volgistics, the person who creates and maintains the account is the account's [Administrator \[pg:0052\]](#). This person can make new [System Operator \[pg:0065\]](#) records so that others can access the account. Depending on the organization's needs, the Administrator may choose to limit the access and rights the other operators have. This help topic outlines how to do this.

#### **Please note!**

System Operators are usually the volunteer managers for your organization. They will potentially have access to

volunteer data held in your account. Generally, you will not make System Operator records for volunteers unless you have a case such as a volunteer who helps manage volunteers, or a volunteer who assists with data input. If you need information on how to add volunteer records to your account, see [help topic 2299 \[pg:1878\]](#).

Administrators can limit operator rights in two ways. One is on an operator specific basis where the control will apply to just that operator, and the other is based on the operator's user level where the change will affect all operators who have the user level. While it is not possible to completely restrict an operator (such as to make everything in the account "read only"), the Administrator can greatly reduce an operator's access and rights.

For this help topic, we'll show you how to create an operator record for someone who is restricted to just viewing basic volunteer information, and entering [service entries \[pg:1581\]](#), from a computer at his organization. Normally operators will not be restricted to this degree; you can pick and choose which of the controls make sense for your needs.

You can click on a link in the *Contents* box below to go directly to a section of the help topic.

## **Contents**

### Operator Specific Controls

Limit the Operator to One Site

Set the Operator's User Level

Control Access Based on IP Address(es)

Prevent Access to Certain Menu Items

Restrict the Operator from Performing Certain Tasks

### User Level Controls

Set Tab Rights

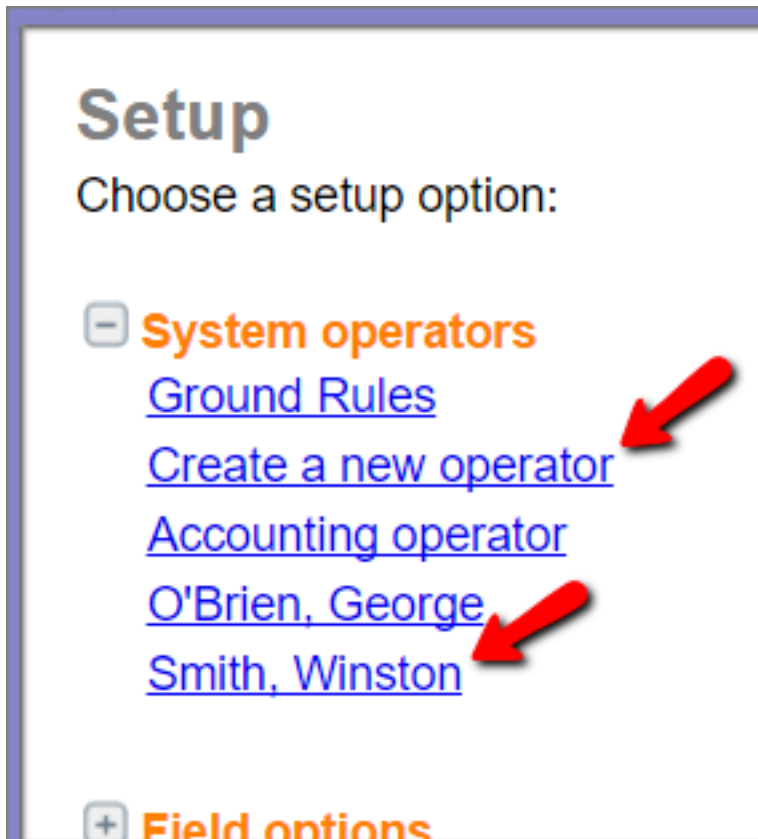
Set Field Rights

Example of Changes for an Operator

## **Operator Specific Controls**

The Administrator can put restrictions on one specific operator from the Setup page for that operator's record. The controls can be put in place when the Administrator creates the operator's record, or the operator's record can be edited afterwards. In either case, the Administrator will follow these basic steps to get started:

1. Select [Setup \[pg:0887\]](#) from the menu.
2. Expand the *System Operators* link.
3. Select the link to create a new operator, or the name of an existing operator.



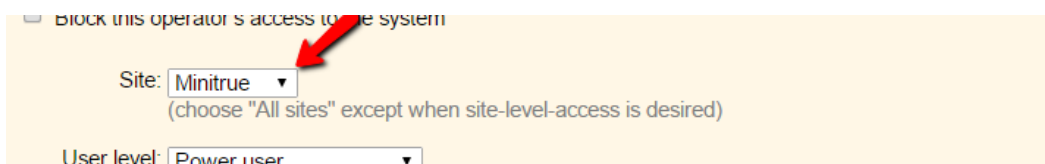
In the Rights section, the Administrator can:

- Limit the operator to a specific Site
- Set the operator's User Level
- Control access based on IP address(es)
- Prevent access to certain [menu \[pg:0215\]](#) items
- Restrict the operator from performing certain tasks

You can find more information on how to set these controls in [help topic 1011 \[pg:1895\]](#). In this help topic, we will explain more about how the changes impact what the operator can see and do.

### Limit the Operator to One Site

When the Administrator limits an operator (or operators) to one Site, it turns on the [Site Level Access \[pg:0092\]](#) feature in the account.



This makes two changes for the operator regarding the Sites (Places and Assignments), and volunteer records.

If the account has multiple Sites created for the [Assignment structure \[pg:0096\]](#), headquarters operators (those with access to all Sites) will see all of the Sites (Places and Assignments) after they select *Assignments* from the menu.



**Assignments**

Refresh Add a new site  Include inactive assignments ⓘ

- + **Miniluv**
- + **Minipax**
- **Miniplenty**
  - [Add a new Place](#)
  - Portion Control Department**
    - [Packaging](#)
    - [Quality Control](#)
    - [Add a new assignment](#)
- **Minitrue**
  - [Add a new Place](#)
  - Disintegration Team**
    - [Analysis Committee](#)
    - [Archiving and Dissolution](#)
    - [Search and Retrieval](#)

But an operator who is assigned to a single Site will only see the Site he is assigned to (and the Places and Assignments under that Site), when he selects Assignments from the menu.

**Assignments**

Refresh  Include inactive assignments ⓘ

- Minitrue**
  - Disintegration Team**
    - [Analysis Committee](#)
    - [Archiving and Dissolution](#)
    - [Search and Retrieval](#)
  - Revision Team**
    - [Editor](#)
    - [Historical Research](#)
    - [Photographer](#)
    - [Publishing and Dissemination](#)
    - [Writer](#)

For volunteer records, the operator will only see the record if the Site he is assigned to appears in the Sites box on the **Core tab** [pg:1868] of the volunteer's record.

<b>Flags</b>	A+ meeting attendance	Good standing
<b>Sites</b>	Minitrue	
<b>Statistics</b>	Life:	MTD:

You can learn more about how volunteer records can be associated with a Site (or Sites) in [help topic 2037 \[pg:0094\]](#).

### Set the Operator's User Level

In Volgistics, operators can have one of three different User Levels: Administrator, Power User, and Basic User.

Site:  (choose "All sites" except when site-level-access is desired)

User level:

Computers:  Login allowed from any computer on the Internet

The account's Administrator tailors how an operator's User Level affects his access to the account. You can learn more about this in the User Level Controls section below.

### Control Access Based on IP Address(es)

If the organization has a static or fixed IP address (or addresses), the Administrator can limit the operator so that he can only sign-in when he is using a computer associated with a certain IP address (or a certain range of IP addresses).

User level:

Computers:  Login allowed from any computer on the Internet

Login allowed only from computers that use one of these Internet addresses:

Permitted host IP address:  .  .  .

Permitted host IP address:  .  .  .  (optional)

This prevents the operator from [logging in \[pg:0220\]](#) when he is not at your facility. For example, the operator will see a message like the one below if he is restricted to your organization's IP addresses and he tries to log-in from home:

Tour	Clients	Try or Buy	Support	Blog	Login
------	---------	------------	---------	------	-------

Your organization has set up Volgistics so you can login only from certain computers on the Internet. This is not one of the computers from which you are permitted to access the system.

Please contact your organization's Volgistics Administrator for further assistance with this restriction. You will not be able to login from this computer while this restriction exists.

### Prevent Access to Certain Menu Items

The Volgistics [menu \[pg:0215\]](#) runs along the left side of your screen and gives the operator the ability to access different areas of the account. For example, in order to generate a new report, the operator would need to access Print from the menu. Or, in order to change the configuration options in the account, the operator would need to access Setup from the menu. This allows you to greatly reduce the areas of your account where an operator could view or change data.

To remove access to a menu area, un-check the box in front of the item in the *This operator may have access to* section of the operator's record. An operator with the following selections on his record:

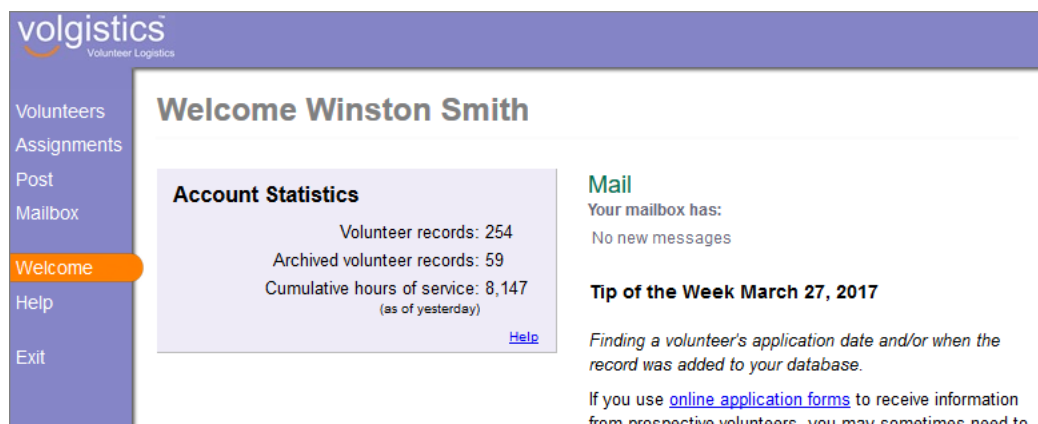
Permitted host IP address:  .  .  .  (optional)

This operator may have access to...

- Volunteers
- Assignments
- Coordinators
- Schedule
- Tickler
- Post
- Tags
- Sets
- Print
- Who's Here
- Setup (can view and change system configuration)

This operator is allowed to

Will have a menu that looks like this when he logs-in:



There is not a way to remove access to certain menu items such as the Mailbox, Welcome page, and Help page. **Restrict the Operator from Performing Certain Tasks**

The Administrator can control some of the common tasks an operator can perform, as well as some of the items the operator will see, in the

*This operator is allowed to*

section of the operator's record. Here is what an operator's record will look if the Administrator wants to limit the operator to working with [service information \[pg:1581\]](#), and [archiving \[pg:1819\]](#) and [restoring \[pg:1852\]](#) volunteers:

Setup (can view and change system configuration)

This operator is allowed to...

- Change their password (if it has not expired)
- Add new volunteer records
- Delete and restore volunteer records
- Archive and restore volunteer records
- Change or delete existing service records
- Add new assignments
- Combine, move or delete assignments
- Add or change schedule openings and schedule setup
- Send email and text messages
- Create or modify reports
- See 'Account Statistics' on Welcome page
- See 'Birthday Lists' on Welcome page
- See information popup icons (blue circles with 'i' inside)
- See session expiration warnings

### Email

In most cases, when an operator cannot perform a task the control necessary to perform the task is removed. For example, if an operator cannot delete volunteers, the **Delete** and **Combine** buttons will not appear on the **Core tab** [pg:1868] of the volunteer records. You can see an example of this in the Example of Changes for an Operator section below.

### User Level Controls

There are two ways that Administrators can control access based on an operator's user level. These are *tab rights* and *field rights*. By default, all user levels (Administrators, Power Users, and Basic Users) have the same access to all tabs and fields. The Administrators change their account's settings based on what restrictions they want to put in place for the other user levels. **These settings impact all operators who have the same user level so Administrators should keep that in mind when making the changes.**

#### **Set Tab Rights**

Tab rights control the ability for operators with a certain user level from accessing **tabs on volunteer records** [pg:1849]. All of the tabs except the Core tab can be hidden. The Docs tabs have additional options because these tabs also appear on Site, Place, Assignment, and **Coordinator** [pg:1922] records when the **VicDocs** [pg:1648] module is included in an account's **service level** [pg:0719].

Here are the steps to hide the Schedule tab for Power User level operators:

1. Select **Setup** [pg:0887] from the menu.
2. Expand the *Field options* link.
3. Select *Schedule tab*.
4. Select *Tab Rights*.
5. Un-check the box by *Power users can*.

>> Setup | Field Options | Schedule tab

**Schedule Tab Rights**

Volgistics Administrators can:  See this tab

Power users can:  See this tab

Basic users can:  See this tab

Save Cancel Help

6. Click the **Save** button.

The same basic steps apply to the other tabs that can be hidden. You can find more information on setting tab rights in [help topic 2154 \[pg:1012\]](#). See [help topic 2553 \[pg:1319\]](#) for information about the unique settings for the Docs tab.

**Set Field Rights**

The majority of the fields on volunteer records can have field rights set for them. In addition to being hidden for operators with a certain user level, fields can also be set to *view only*. In this case, the operator could see the information in the field, but could not enter or update data.

Here are the steps to make the *Last name* field on the Core tab *view only* for Power User level operators:

1. Select [Setup \[pg:0887\]](#) from the menu.
2. Expand the *Field options* link.
3. Select *Core tab*.
4. Select *Last name*.
5. In the *System operator rights* section, change the dropdown list by Power Users to *View only*.

Default entry: \_\_\_\_\_

**System operator rights**

Volgistics Administrators: View and change ▼

Power users: View only ▼

Basic users: View only ▼

Help Save Cancel

6. Click the **Save** button.

The same basic steps apply to other fields you want to hide or make view only. You can find more information on field setup options in [help topic 2017 \[pg:0957\]](#).

**Example of Changes for an Operator**

Here is example of how the settings outlined above for tab and field right restrictions impact an operator's account use. This is the view of the Core tab of a volunteer record for an Administrator level System Operator without any tab or field restrictions:

# Parsons, Thomas

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

Save Cancel Archive Delete Combine New Previous Next

Tagged Copy

**Name**

Last name: Parsons Number: 359970

First name: Thomas **Status:** Active

Middle name: Title: Mr.

Nickname: Tom Type: Outer Party

Kind:  Individual  Group

**Address**

Street 1: 1984 Chestnut Tree Drive Home: (202) 732-3321  Ok to call

City: Airstrip One Work: (202) 456-8874  Ok to call

State: DC Zip: 20500 Text:

Messaging:  No postal mail  No email

No text message

Email: t.parsons@outerparty.org

Web site:

**Flags** A+ Meeting attendance Good standing

Flag: Save

**Sites** Minitrue

Site: Save

Here is the same record for a Power User level System Operator when the restrictions outlined in this help topic are applied:

## Parsons, Thomas

Core	Profile	Service	Contacts	Vic	Docs
------	---------	---------	----------	-----	------

Save Cancel Archive Previous Next

Tagged Copy

### Name

Last name:	Parsons	Status:	Active
First name:	Thomas	Type:	Outer Party
Middle name:		Title:	Mr.
Nickname:	Tom	Kind:	Individual

### Address

Street 1:	1984 Chestnut Tree Drive	Home:	(202) 732-3321	<input checked="" type="checkbox"/> Ok to call
City:	Airstrip One	Work:	(202) 456-8874	<input checked="" type="checkbox"/> Ok to call
State:	DC	Zip:	20500	Text: <input type="text"/>

Messaging:  No postal mail  No email  
 No text message

Email:

Web site:

### Flags

A+ Meeting attendance	<input type="text"/>	Good standing	<input type="text"/>
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### Sites

Minitrue	<input type="text"/>
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Some differences in what the operators see when they view the same volunteer record are:

- The *Schedule*, *History*, and *Notes* tabs have been hidden for the Power User operators.
- The *Number* field has been hidden for Power Users, while other fields such as *Last name*, *First name*, *Status*, and *Type* have been set to view only.
- The Power User operator is also a [Site-Level Operator \[pg:1442\]](#) so he cannot change the volunteer's Site, or add a new Site.
- The Power User operator is not allowed to add or delete volunteer records so the **Delete**, **Combine**, and **New** buttons do not appear under the row of tabs.

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## Volgistics Fiscal Year

Help topic 2116

Added or revised 01-29-2013

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Volgistics calculates certain year-to-date (YTD) service statistics on a 12 month cycle that begins on the month of the year you specify. This 12 month cycle is known as the Volgistics fiscal year. Most accounts set this up to correspond with the fiscal year used for accounting at their organization.

The Volgistics fiscal year is used as the basis for calculating these statistics:

- YTD Hours. The year-to-date (YTD) hours field that appears in the Statistics box on the [Core tab \[pg:1868\]](#) is the sum of each volunteer's service since the first day of the current Volgistics fiscal year.
- Service summary reports. The [Service Summary Report \[pg:0580\]](#) format includes an option for printing volunteer service statistics for either the calendar year, or the Volgistics fiscal year.

- Award criteria. You can create [award rules \[pg:0909\]](#) based on service performed during the calendar year or the Volgistics fiscal year.

By default, the Volgistics fiscal year is the same as the calendar year (January through December). However, you can set the Volgistics fiscal year to match your organization's fiscal year if the fiscal year used by your organization is not the same as the calendar year.

To set or change the 12 month period used for the Volgistics fiscal year:

1. Choose Setup from the [menu \[pg:0215\]](#).
2. Click "Other options," and then click "Statistics."
3. Scroll down to the "Volgistics fiscal year" section.
4. Choose the month you want the Volgistics fiscal year to begin. For example, if your organization's fiscal year starts on July 1st, and you want Volgistics to use the same fiscal year, choose July.
5. Click the **Save** button.

The Volgistics fiscal year must begin on the first of a month.

#### Related help

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## Using the Clipboard to Copy and Paste Text into a Volgistics Text Area

Help topic 2138

Added or revised 07-25-2005

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If you use a Microsoft Windows operating system you can use the Windows 'clipboard' feature to copy and paste text from other sources – such as a word processor – into Volgistics.

This technique is especially useful for Volgistics "text areas" where you enter blocks of text, such as the job description field in the Assignment record. By using your word processor to initially compose such text, you can take advantage of your word processors editing features, including spelling checkers. Once you have written and checked your text you can use the clipboard to copy and paste it into Volgistics.

To copy and paste text into Volgistics:

1. Open the program and document you want to copy text from (e.g. Microsoft Word).
2. In most Windows programs you copy text to the clipboard by selecting the text you want to copy (using your mouse or the 'Select All' option on the Edit menu) and then selecting "Copy" from the Edit menu.
3. To paste the text, open Volgistics to page where you want to paste the text, click once on the field where you want to paste the text, and then choose 'Paste' from the Edit menu in your browser.

The specific menu options used in these steps may vary, depending upon your operating system and browser.



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## Creating Desktop Shortcuts

Help topic 2144

Added or revised 02-12-2013

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If you use Volgistics regularly from a particular computer, you can create a desktop shortcut to the Volgistics Login page at that computer. Then you can get to the login screen each time you want to use Volgistics by simply clicking the shortcut. If you're using the Windows operating system on your computer, you can make a shortcut by following these steps.

1. Go to [www.volgistics.com](http://www.volgistics.com).
2. Select *Login* from the menu at the top of the page.
3. Highlight the address that appears in the URL window of your web browser and copy it. You can copy by right-clicking on the highlighted address and selecting *Copy*. Or you can hold down the Control (CTRL) key on your keyboard and press the key for the letter C.
4. Minimize the screen showing the Volgistics page if you need to, then right-click on an open area of your desktop.
5. Select *New* from the menu.
6. Select *Shortcut* to start the Create Shortcut Wizard.
7. Paste the URL address you copied into the location field. You can paste by right-clicking in the field and selecting *Paste*. Or you can left-click so the cursor appears in the field, hold down the Control (CTRL) key on your keyboard and press the key for the letter V.
8. Once the URL address is pasted into the location field, click the **Next** button and follow the directions in the Create Shortcut Wizard to complete the shortcut.

You now have a shortcut that will take you directly to the Volgistics login page.

### Related help

[Help Topic 1183 \[pg:0888\]](#) - Managing Volgistics Cookies

[Help Topic 2203 \[pg:0064\]](#) - How do I change the login name or password I use to access Volgistics

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## How do I change the login name or password I use to access Volgistics?

Help topic 2203

Added or revised 05-28-2014

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### If you are not a Volgistics Administrator

If you are a [System Operator \[pg:0065\]](#) with access to [Setup \[pg:0887\]](#) on the menu, proceed to the *If you are the Volgistics Administrator* section below. If you do not have access to Setup, you may be able to change your password by:

1. Login to Volgistics using your current login name and password.

2. Choose *Welcome* from the [menu \[pg:0215\]](#) if you are not already on this page.
3. Click the *Change your Volgistics password* link.
4. Follow the instructions on the page for changing your password and then click the **Save** button.

Note: The [Volgistics Administrator \[pg:0052\]](#) for your organization may configure your system so that it's not possible for you to change your own password. If the *Change your Volgistics password* link does not appear on the Welcome page, contact your organization's Volgistics Administrator for assistance. You can find the Administrator(s) for your account by selecting *Help* from the menu and clicking the *Operator information* link.

#### If you are the Volgistics Administrator

If you are the Volgistics Administrator for your account, you can change your login name and/or password, and other System Operator's login names and passwords, like this:

1. Login to Volgistics using your current login name and password.
2. Choose *Setup* from the [menu \[pg:0215\]](#).
3. Select *System Operators*.
4. Click on your name, or the name of the System Operator for whom you want to change the email address or password.
5. On the System Operator page, enter the new email address and/or password in the *Email address* and *Password* fields, and then click the **Save** button. The new email address and password take affect right away.

#### **Related help**

- [Help Topic 1011 \[pg:1895\]](#) - System Operator Page
- [Help Topic 1306 \[pg:0044\]](#) - Forget your password? (System Operators)
- [Help Topic 2236 \[pg:1442\]](#) - System Operator Ground Rules
- [Help topic 2248 \[pg:1612\]](#) - What to do if a System Operator reports they cannot login

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## **System Operator**

Help topic 2205

Added or revised 04-03-2017

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System Operators are the people in your organization who you give access to the Volgistics system. Each System Operator has a login name (their email address), and a password you assign when you [setup a new System Operator \[pg:1440\]](#). You can also tailor certain system "rights" for each System Operator. You can use these rights to control the degree of access an operator has to the system, and what features they can use. [Help topic 2028 \[pg:0053\]](#) explains how to do this.

With the [Site Level Access \[pg:0092\]](#) features, you can also control which volunteers an individual System Operator will "see" when they access Volgistics. This is ideal for organizations that have volunteer coordinators at different remote sites (such as branch or county offices) or for different volunteer groups within the same organization (such as Adult and Junior volunteer programs). These [site-level operators \[pg:1442\]](#) only "see" the volunteers for their own site or program when they login to Volgistics.

Who the individual System Operators are in your organization depends on the nature of your volunteer program. Typically, System Operators are the paid or volunteer staff who manage or coordinate your organization's volunteer program, especially those responsible for maintaining volunteer records.

All Volgistics accounts come with space for two different System Operators, although you may increase your account's [Service Level \[pg:0719\]](#) to provide space for as many different System Operators as you need.

It is permissible for two or more different individuals to share the same Volgistics System Operator login name and password; however they cannot both use Volgistics at the same time. In addition, people who share the same System Operator login name and password will have the same system rights, and appear to be the same person in the system log.

At least one of your System Operators must be designated as the [Volgistics Administrator \[pg:0052\]](#) for your organization.

**Note** that you can also setup [Coordinators \[pg:1922\]](#) in Volgistics. Coordinators are different than System Operators in several ways:

- Coordinators are typically people who coordinate, supervise, or schedule volunteers in a specific assignment (or multiple assignments). They are often volunteer chairpersons, team leaders or paid staff who coordinate the volunteers in their area as just one responsibility.
- Coordinators cannot access the Volgistics database directly; however they can manage certain core information about the volunteers they supervise and their volunteer's schedules through [VicNet \[pg:1724\]](#).
- There's no limit to the number of Coordinators you can have in your account. The number of Coordinators you track in your account does not affect your account's [Service Level \[pg:0719\]](#).

#### Related Help

[Help Topic 1011 \[pg:1895\]](#) - System Operator Page

[Help Topic 1020 \[pg:0024\]](#) - What to Do When a System Operator Leaves Your Organization

[Help Topic 1306 \[pg:0044\]](#) - Forget your password? (System Operators)

[Help Topic 2025 \[pg:0052\]](#) - Volgistics Administrator

[Help Topic 2028 \[pg:0053\]](#) - How to Limit Operator Rights or Access

[Help Topic 2236 \[pg:1442\]](#) - System Operator Ground Rules

[Help Topic 2248 \[pg:1612\]](#) - What to do if a System Operator reports they cannot login

[Help Topic 2535 \[pg:0084\]](#) - Assuming the Role of Volgistics Administrator

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## Archive Help Inquiries

Help topic 2231

Added or revised 04-16-2014

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Answers to help inquiries you post for the Volgistics Team appear on the *Help E-mail* tab in your Volgistics mailbox. [Help topic 1027 \[pg:1902\]](#) shows how to view these.

You can optionally "archive" the old help inquiries in your Volgistics mailbox. When you archive a help inquiry, it will no longer appear on the *Help E-mail* tab, except for [Volgistics Administrators \[pg:0052\]](#) who want to view the archived inquiries.

To archive a help inquiry:

1. From the *Help E-mail* tab in your Volgistics Mailbox, click on the message you want to archive.

2. Click the **Archive** button.

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## Volgistics Updates

Help topic 2232

Added or revised 12-16-2016

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This page lists the latest Volgistics features and improvements from January 2010 until now. Visit this page any time to see what's new!

### **Volgistics Now Supports Microsoft Edge** December 19, 2016

Microsoft Edge has been added to the list of web browsers Volgistics supports for use with the system. [More information \[pg:0179\]](#)

### **Send Screenshots, or Other Files, with Help Inquiries** July 22, 2016

You can now provide a screenshot of what you're seeing, or a document that you are referring to, when you submit a question to the Volgistics Support Team. [More information \[\\_\\_\\_\\_\\_\]](#)

### **New Stock Reports Available** May 26, 2016

We've added new stock reports to the robust array of stock reports already available. Stock report categories were created for [Name Tags \[pg:0531\]](#), [Statistics \[pg:0593\]](#), and [Volunteer Profiles \[pg:0703\]](#). Also, a new [Service Summary \[pg:0580\]](#) by calendar report was added. [More information \[pg:0595\]](#)

### **Updated Methods for Setting and Sending Passwords** May 6, 2016

Volgistics made updates to the way passwords are set and reset. Temporary passwords can no longer be sent by email. Instead, a link is sent by email to set or reset the password. Recipients sign-in to their email account and click the link to set their own passwords. The link remains valid for 24 hours. If the recipient does not click the link within 24 hours, she can click the *Forget your password?* link on the login screen to have a new link sent. [More information](#)

### **Added Options to Limit Service Reports to Active Assignments, Control Service Measure Wording, Re-evaluate Checklist Items, Turn off Session Expiration Alerts, and Choose if Opening Notes Appear on Applications** April 8, 2016

You can now configure [Service Detail \[pg:0560\]](#) and [Service Summary \[pg:0580\]](#) reports to show hours for just active assignments, just [inactive assignments \[pg:0140\]](#), or both active and inactive assignments. [More information here \[pg:0554\]](#) and [here \[pg:0571\]](#)

If you allow volunteers to enter [Service Measure \[pg:1557\]](#) information on the [Time Sheet tab \[pg:1460\]](#) in [VicNet \[pg:1724\]](#), you can now control the wording that shows along with the Service Measure. [More information \[pg:1406\]](#)

When you use the Tickler feature to find volunteers due for a [Checklist item \[pg:0142\]](#), you can re-evaluate if your volunteers are due before you search. [More information \[pg:0148\]](#)

You can now turn off the alerts that warn when your [session will expire \[pg:1589\]](#) on an operator-by-operator basis. This will not prevent the [operator's \[pg:0065\]](#) session from expiring, but the operator will not see the warnings pop up. [More information \[\\_\\_\\_\\_\\_\]](#)

If you use Schedule Preference fields on your [online application forms \[pg:0413\]](#), you can now select to include, or not include, [opening notes \[pg:0750\]](#). [More information \[pg:1343\]](#)

### **Upload Documents to Volunteer, Coordinator, and Assignment Records** February 19, 2016

Phases three and four of the new VicDocs feature have been released. You can now go paperless by storing electronic documents on volunteer, [Coordinator \[pg:1922\]](#), and [Site, Place, and Assignment \[pg:0096\]](#) records. Due to the increases in bandwidth, storage, and administrative costs, you will need to add VicDocs to your account's [service level \[pg:0719\]](#) in order to utilize it. We have tried to keep the increase in fees for VicDocs as small as possible. [More information \[pg:1648\]](#)

### **Volunteer & Assignment Matching Feature Updated** January 24, 2016

The Volunteer & Assignment matching feature is designed to help you find volunteers who meet certain requirements you enter on assignment records. This can make it easier to place new volunteers in assignments they are qualified to fill. This feature has been re-worked to be easier to use while producing more predictable results. [More information \[pg:0899\]](#)

### **Added New Features to Volunteers Page** December 9, 2015

New features were added that give you more control over how many, and which, records are displayed on the Volunteers page. This makes finding just the records you want much easier. [More information here \[\\_\\_\\_\\_\\_\]](#) and [here \[\\_\\_\\_\\_\\_\]](#)

### **Added Mobile Friendly View of VicNet** November 6, 2015

A mobile friendly view of [VicNet \[pg:1724\]](#) is available. There is a guide to show volunteers how to use this [here \[pg:1676\]](#). We've also added options in [Setup \[pg:0887\]](#) to allow [Administrators \[pg:0052\]](#) to customize what their volunteers and [Coordinators \[pg:1922\]](#) will see. [More information \[pg:1934\]](#)

### **PDF File of Completed Application Automatically Saved** October 16, 2015

Phase two of the

VicDocs electronic document storage feature has been released. This phase automatically saves a [PDF \[pg:0449\]](#) file of the completed online [application form \[pg:0413\]](#) to the new volunteer record. [More information \[pg:1373\]](#)

### **Change to Volunteer Search During Record Combination** July 2, 2015

We replaced the dropdown list of volunteer names used when two volunteer records were combined with a new feature that displays potential matches after the first two characters are entered. The search is narrowed down as each additional character is entered, which will make the correct record easier to locate. [More information \[pg:1884\]](#)

### **Added Feature to Print a Blank Application Form and Added Application Name column to Applications Tab** March 27, 2015

You can now print or save a PDF of any of your [application forms \[pg:0413\]](#) that are setup in your Volgistics account. This allows you to use the form for prospective volunteers who do not have Internet access, or create forms to hand out at activities such as volunteer fairs. [More information \[pg:1375\]](#)

The Applications tab of the Volgistics mailbox allows you to preview some basic information about applicants before accepting their volunteer record into the database. We've added a new column to this tab that shows the internal name of the application form the applicant submitted. This will be helpful in cases where your organization uses multiple forms because it you will be able to identify the form used by the applicant without receiving the record into your database. [More information \[pg:0415\]](#)

### **Added Ability to Clone an Application Form** January 16, 2015

You can now take an existing application form and make a new one that has the same settings selected. You can then modify the new form that was created. This allows you to quickly make new forms that have the same basic settings. [More information \[pg:1367\]](#)

## **Added Features for Deleting Multiple Tagged Records and Restricting Access to the VicNet Time Sheet**

**Tab** October 17, 2014

In March, Volgistics added the ability to [restore accidentally deleted volunteer records \[pg:1888\]](#) during a five day hold period. Because of this added ability, Volgistics has added a new feature to delete multiple [non-archived \[pg:0709\]](#) records at the same time by using the [Tags \[pg:1529\]](#) feature. [More information \[ \]](#)

The [VicNet \[pg:1724\]](#) Time Sheet tab allows volunteers to input their own [service \[pg:1581\]](#) information from any computer with an Internet connection. You can now limit access to this tab to selected volunteers based on their [Type or Flag \[pg:0212\]](#) without changing which volunteers can access the entire VicNet module. [More information \[pg:1460\]](#)

## **Set Rule Added for No Postal Mail Field** September 19, 2014

The *No postal mail* box on the [Core tab \[pg:1868\]](#) of the volunteer's record is used to prevent the volunteer's information from being included in [Address Label Reports \[pg:0483\]](#). This can be used when the volunteer (or your organization) wants to prevent postal mail from being sent. For instance, if more than one person in the household volunteers with your organization, or the volunteer has been dismissed but you still need to keep a record for him or her. A [Set Rule \[pg:0853\]](#) has been added that allows you to identify records that have this box checked, or un-checked. [More information \[pg:0881\]](#)

## **The "Their schedule" Set Rule Can Now Be Limited to a Specific Site, Place or Assignment** September 12, 2014

You can now limit the *Their schedule* Set rule to look for just volunteers who are scheduled for a specific [Site, Place or Assignment \[pg:0096\]](#). This allows you to find the volunteers who were, or are, scheduled on a certain date, or in a certain time frame, for the Site, Place or Assignment. [More information \[pg:0832\]](#)

## **Text Messaging Now Available** August 8, 2014

[System Operators \[pg:0065\]](#) can now send outgoing text (SMS) messages to their volunteers and [Coordinators \[pg:1922\]](#). This service is offered free-of-charge but does require the [VicNet \[pg:1724\]](#) module as part of the account's [service level \[pg:0719\]](#) because regulations require users to [opt-in to text messaging \[pg:1948\]](#).

You can send volunteers and Coordinators [custom text messages \[pg:0343\]](#). Depending on your account's setup, volunteers can also receive [schedule reminders \[pg:0791\]](#) by text as well as reminders when annual or periodic [Checklist \[pg:0142\]](#) items are due. Additionally, Coordinators can receive [schedule alerts \[ \]](#) via text when volunteers add or remove themselves from the schedule. System Operators can also have texts sent for [application alerts \[ \]](#) to let them know when an application form has been received.

The following video has more information on the text messaging feature: [Here](#)

There is also more information on the text messaging feature in the following help topics:

[Help Topic 1300 - "Text Messaging" \[pg:1966\]](#)

[Help Topic 1301 - "Getting Started with Text Messaging" \[pg:1971\]](#)

## **Procedure Change for Forgotten Passwords** May 23, 2014

We changed the way forgotten passwords are delivered as part of our commitment to continually enhance security. When a user forgets her or his password, the system now sets the password to a temporary, random password, which is sent to the user by email. This password must be changed to a permanent password that meets the password strength rules setup for your account when the user signs-in using the temporary password. The following help topics explain more about passwords and how the system handles forgotten passwords:

[Help topic 1305 "Volunteer & Coordinator Passwords \[pg:1699\]](#)

[Help topic 1307 "Forget your password? \(Volunteers and Coordinators\) \[pg:1975\]](#)

[Help topic 1306 "Forget your password? \(System Operators\) \[pg:0044\]](#)

### **Search for volunteer records based on their country** May 12, 2014

A new [Set rule \[pg:0853\]](#) was added that allows you to search for volunteer records based on the information in the Country field on the [Core tab \[pg:1868\]](#) of the record. [More information \[pg:0885\]](#)

### **Restore deleted records feature added, session expiration warning added, Site Selection field enabled for all application forms, and ability to hide information popup icons for a System Operator added** March 3, 2014

A feature was added to hold deleted volunteer records for five (5) days before permanently deleting them from the system. During this hold period, a [System Operator \[pg:0065\]](#) can restore a [deleted volunteer record \[pg:2016\]](#) if it was accidentally deleted. [More information \[pg:1888\]](#)

[System Operators \[pg:0065\]](#) will now receive a warning message approximately 10 minutes before their current Volgistics session expires and after the session ends. [More information \[pg:1589\]](#)

The Site Selection field is now enabled for [online application forms \[pg:0413\]](#) even if [Site Level Access \[pg:0092\]](#) is not in use for the account. This allows an application form to show [Assignment Preferences \[pg:1351\]](#) for just [one specific Site \[pg:0967\]](#) as long as the form is setup to apply to the Site. [More information \[pg:1338\]](#)

The information popup icons that appear through-out the account to give more information about fields and features can now be hidden, or disabled, on an operator-by-operator basis. [More information \[\\_\\_\\_\\_\\_\]](#)

### **Travel Time Merit Hours feature added and Group sign-in added for VicTouch** January 10, 2014

Volgistics has always had a feature to use [Merit Hours \[pg:1564\]](#) to add time to a volunteer's regular [service hours \[pg:1581\]](#) automatically. This is useful in situations where you want to award extra service because the volunteer served on a [holiday \[pg:1391\]](#) or weekend. Many organizations also used this feature to give volunteers credit for the time they spent traveling to and from the facility. This use had some limitations, though, which have now been addressed with our new Travel Time Merit Hours feature. This feature is designed specifically for giving credit for travel time and allows you to give the same number of hours and minutes for all volunteers, or hours and minutes based on up to six zones. [More information \[pg:1416\]](#)

[Group \[pg:1909\]](#) leaders can now sign-in to the [VicTouch \[pg:1778\]](#) module and record the number of volunteers who are serving in their group. This eliminates the need for a [System Operator \[pg:0065\]](#) to go back and edit the service entry to contain the number of volunteers because the number will automatically be recorded. To start using this new feature, you will need to [shut down VicTouch \[pg:1762\]](#) and then re-start the module. [More information \[pg:1759\]](#)

### **Volunteers field for posting service for groups added to Post page, Edit link added for service record auditing, and Middle Name field added to Volunteers page** December 4, 2013

You can now enter the number of volunteers who served in a [group \[pg:1909\]](#) when entering volunteer service for multiple records on the Post page. [More information \[pg:1559\]](#)

When you review service entries setup for auditing, you can now edit a service entry directly from the Service tab of the Volgistics Mailbox. [More information \[pg:1415\]](#)

The Middle Name field was added to the fields available to show on the Volunteers page. The field will appear in the Name column at the end of the "Last Name, First Name" entry if you select to show it. [More information \[pg:1381\]](#)

### **Link and tag features added to Who's Here page and Service Measures now available when adding**

**Mandatory Service from Tags page** October 30, 2013

You can now go directly to a volunteer record and [tag \[pg:1529\]](#) volunteer records from the Who's Here page. [More information \[pg:1772\]](#)

When using the [tags feature \[pg:1529\]](#) to add [Mandatory Service \[pg:1419\]](#) to multiple records at a time, you can now add any [Service Measures \[pg:1557\]](#) setup to be recorded for the mandate. [More information \[pg:1999\]](#)

### **Mailbox and message history updates, date selector calendar revision, Date of Last Activity added for System Operators, and VicNet access date field added to Volunteers page**

October 18, 2013

To ensure efficiency and clean up the list views for [System Operators \[pg:0065\]](#), changes were made to the Volgistics Mailbox and to the message history on volunteer records. These changes affected alert and report storage on the [In Box \[pg:1917\]](#) tab, message storage on the [Out Box \[pg:1978\]](#) tab, and the [message history \[pg:0370\]](#) stored on volunteer records. More information

The date selector calendar for adding dates to date fields was totally revised to make it easier to use. [More information \[pg:0198\]](#)

A Date of Last Activity field was added to [System Operator \[pg:0065\]](#) records to help determine when the operator logged into Volgistics last. In some cases, you will need to use this field in conjunction with your account's [Event Log \[pg:0028\]](#) to accurately establish the last date the operator accessed Volgistics. [More information \[pg:1895\]](#)

The Last VicNet Access date field from the [Vic tab \[pg:1810\]](#) of volunteer records was added to the fields available to show on the Volunteers page. The Last VicNet Access field records the last date a volunteer signed into the [VicNet \[pg:1724\]](#) portal for your account. [More information \[pg:1381\]](#)

### **Getting Started help topic and manual updated**

August 27, 2013

The Getting Started help topic was completely redone to meet the needs of new users. The revised help topic includes many additional help topics previously not included, enhancements to some of the previously included help topics, brand new help topics addressing account setup, and a reorganization of the order help topics appear in to match the procedure of setting up an account more closely. [More information \[pg:0222\]](#)

The Getting Started manual, a PDF file compiled from the help topics in the Getting Started help topic, was also updated. Changes include the addition of all help topics used in the Getting Started help topic, a table of contents, indexes organized by help topic number and alphabetically, clickable links to navigate within the PDF document, and page numbering. More information

### **New Assignment Profile reports available and "All Sites" option added on Print page**

May 23, 2013

The new Assignment Profile report feature makes it possible to create [PDF \[pg:0449\]](#) files that include [Assignment \[pg:0096\]](#) and [Coordinator \[pg:1922\]](#) information. The reports have optional Summary Pages outlining the information included in the report and/or Assignment Detail Pages for each Assignment depending on the options you choose when you create the report. [More information \[pg:0492\]](#)

An "All Sites" checkbox was added to the Print page to allow headquarters level operators to see, modify or delete reports created by [Site-Level Operators \[pg:1442\]](#). [More information \[pg:0438\]](#)

### **Delete multiple reports, wildcard search and VicNet time zone features added**

January 21, 2013

Before you were only able to delete a single [custom report \[pg:0467\]](#) at a time. The new feature allows [System Operators \[pg:0065\]](#) to delete multiple reports at one time. [More information \[pg:0438\]](#)



New wildcard search options were added to help you find volunteer records when you only know part of the information for the search field, or are unsure of the spelling. [More information \[pg:1982\]](#)

New settings were added to the VicNet Time Sheet tab to allow volunteers in time zones where the date is different than the date for your account's time zone to enter service. [More information \[pg:1460\]](#)

### **Event added for Set changes and Nickname added to Who's Here page** November 3, 2012

The Event Log will now show an entry for "Edited Set Record" whenever the **Finished** button is clicked on the [Define a new set \[pg:0859\]](#) page. This will track when a new Set is created if the button is clicked to complete the action, or when a Set rule is added, modified, or deleted from an existing Set. If an operator clicks the button without making a change, this will also cause the entry to be made in the Event Log. [More information \[pg:0028\]](#)

The Who's Here page will now include the information in the Nickname field on the [Core tab \[pg:1868\]](#) of the volunteer record. For example, if a volunteer named

*Theodore Smith*

has

*Teddy*

entered in the Nickname field, his name will now appear as

*Theodore Smith ("Teddy")*

on the Who's Here page. There is a setting to enable or disable this feature under Settings on the Who's Here page. [More information \[pg:1772\]](#)

### **Import Utility program updated and "Re-evaluate now" button added to Tickler** September 28, 2012

The Import Utility program used to transfer volunteer records from spread sheet files into new accounts was updated to improve usability. The update also includes a re-write of the Import Utility Manual to address program changes, as well as adding usability features such as links to Help topics and clickable links to navigate within the PDF document. [More information](#)

A

#### **Re-evaluate now**

button was added to the Awards section of the Tickler feature. Previously, a volunteer's eligibility to receive an Award was evaluated only during the overnight maintenance cycle or if you visited the History tab of the volunteer's record. The new button allows you to check who is eligible for Awards without visiting each record, or waiting for overnight maintenance. This is helpful if you recently added service entries that may make a volunteer eligible for an Award. [More information \[pg:1551\]](#)

### **Reference manual updated and information buttons added** August 29, 2012

Volgistics includes a reference manual in PDF format that is a compilation of Help topics. This manual was updated to include Help topic edits and new Help topics added since it was published last. Other changes to the manual included adding a table of contents, indexes organized by Help topic number and alphabetically, clickable links to navigate within the PDF document, and page numbering. [More information](#)

Information buttons were added throughout Volgistics in locations where more information might be needed about a setting, button, field or function. If you move your cursor over an information button, a window appears with advice. The window may also have links to Help topics with more information. You can click the link to open the Help topic in a new window, or move your cursor off of the button to cause the window to no longer be shown.

#### **Control VicNet display options for completed Mandatory Service items** July 18, 2012

Previously if organizations selected to include the progress chart for Mandatory Service items on the VicNet "My Service" tab, completed Mandatory Service items were shown for six months by default. The latest release allows organizations to select if they want completed Mandatory Service items to be displayed, and if they do for how long the completed items will be shown. There are settings to display the item for 1, 2, 3, 4, 5 or 6 months after the item has been completed. Accounts that had the item set to be displayed will have the 6 month option selected automatically. [More information \[pg:1419\]](#)

#### **Sort columns on the Volunteers page and new features on the Print page** July 2, 2012

By default, the list of information on the page you see when you select Volunteers from the Menu is sorted in alphabetical order based on the record's last name. The new change allows you to click on the headers that appear at the top of each column to sort the page by that column. [More information \[pg:1381\]](#)

The layout of the page you see when you select Print from the Menu has been changed to make finding the reports you need easier. Reports that are created with rows and columns of information appear under "Table Style Reports." Reports designed to be printed on labels appear under "Label Style Reports." Schedule reports appear under "Other Reports" because they can be in calendar, list or table formats. Any custom reports previously in your account will still be found under the link they were originally created under.

Another change to this page is that if you place your cursor over a [stock report \[pg:0595\]](#) link, a thumbnail image with an example of this report will appear. If you place your cursor over the thumbnail image, an expanded view of the image appears. This change will make it easier to identify the report you need.

#### **Sort birthday list by date and insert current time into entries on the Who's Here page** June 4, 2012

By default, the birthday list is sorted alphabetically by the volunteer's last name each time you visit the Welcome page. With the latest update, a button has been added to allow you to quickly sort the list by date order instead. [More information \[pg:1385\]](#)

When you edit service entries on the Who's Here page, you can now simply click a button to insert the current time into 'Time-in' or 'Time-out' fields. [More information \[pg:1772\]](#)

#### **New HTML Email Features available** April 23, 2012

New HTML emails features were added to allow more flexibility in creating email documents with HTML formatting. The HTML format for email messages offers many advantages that will help your messages get noticed such as font choices; bold faced, underlined or italicized text; text colors; graphics, pictures and more. If your organization uses these emails to send newsletters or announcements, this can help eliminate the need to send an additional email attachment. [More information \[pg:0295\]](#)

#### **New schedule reports available** January 6, 2012

New schedule report features were added to allow more flexibility in creating PDF documents with schedule information. Monthly, weekly and daily time frames are available along with the option to include a range of dates. The reports include six stock reports, but can also be customized to meet different needs. [More information \[pg:0547\]](#)

### **New password strength rules available**December 5, 2011

New password strength rules were added to allow account Administrators to have more control over passwords System Operators must use to log-in. [More information \[pg:1442\]](#)

The update also allows Administrators to have more control over the passwords volunteers use when they log-in to the VicNet portal. [More information \[pg:1447\]](#)

### **Delete archived volunteer records by Flag**October 3, 2011

Archived volunteer records can now be deleted based on a particular Flag. This allows operators to pin point archived records to delete when making mass deletions. [More information \[pg:1822\]](#)

### **New web site look and self-scheduling alerts**August 1, 2011

The Volgistics web site has new cosmetic and navigation changes designed to improve the look and functionality of the site. Page names are more user friendly and the page footers on each page contain quick links to commonly used pages.

New self-scheduling alerts are available to let Coordinators and System Operators know when a volunteer adds and/or removes herself from the schedule through VicNet or VicTouch. The alerts are customizable on an assignment-by-assignment basis on the Rules tab of each assignment. [More information \[pg:2006\]](#)

### **MS Word 2007 documents supported and retroactive Service Measures available**March 9, 2011

Microsoft Word 2007 document formats (.docx) can be uploaded to the Documents tab of the Volgistics Mailbox. [More information \[pg:0388\]](#)

You can now apply a default value for a Service Measure retroactively to volunteer records. This eliminates the need to manually enter information on past records when you create a new Service Measure. [More information \[pg:1406\]](#)

### **Group records now available and customizable Volunteer List page**February 18, 2011

The latest release introduces Group records to Volgistics. These can be used in place of Individual records if a group of volunteers serve and you do not want to track individual service hours or contact information. The Group records contain many of the same features as Individual records, but have additional fields designed for scheduling and recording service for multiple volunteers at once. [More information \[pg:1909\]](#)

You can also customize which fields of information will appear on the Volunteer List page. This is the page that comes up after you select Volunteers from the Menu. [More information \[pg:1381\]](#)

### **Insert volunteer information in email messages**December 12, 2010

Added the ability to imbed volunteer information into email messages. Messages personalized with the volunteer's name have been shown to improve response rates. This feature also allows items like the volunteer's VicNet password and/or VicTouch PIN number to be included in the message. [More information \[pg:0386\]](#)

### **Clear spare (custom) fields throughout account**October 12, 2010

Added ability to clear all data from any of the spare (custom) fields on the Profile tab of volunteer records. This action deletes all data entered into the field for all volunteer records throughout the account no matter if they are regular, archived or restricted to a certain site. Operators must confirm they wish to make the change by entering their credentials. [More information \[pg:0957\]](#)

## **Add All States or Provinces at once to State or Province dropdown list**September 17, 2010

By default, Volgistics only puts the State or Province an account originated in as an entry in the State or Province dropdown list because this is often all that is needed. Previously new States or Provinces had to be added individually. This feature allows all States or Provinces to be added in one step. [More information \[pg:1016\]](#)

## **New Schedule Features**July 30, 2010

The New Schedule Features include:

Track specific tasks or locations on the schedule

Streamlined schedule opening management Coordinator schedule view in VicNet

Improved calendar views

Improved navigation

Optionally place new applications directly on the schedule

[More information \[pg:0741\]](#)

## **Sender ID email authentication**May 21, 2010

Volgistics now supports "Sender ID" email authentication for the email messages you send to volunteers and coordinators through Volgistics. Email authentication helps ensure that your email is delivered, and helps prevent your email from going into spam folders. [More information \[pg:0311\]](#)

## **Get alerts for new volunteer applications**January 28, 2010

You can have an alert sent to a designated Volgistics [system operator \[pg:0065\]](#) each time someone submits an online volunteer application. To setup these alerts:

1. Choose Setup from the menu.
2. Select Online forms.
3. Select Volunteer application forms.
4. Click on the name of the application for you would like alerts sent for.
5. Under "Alerts," choose the name of the system operator who should receive the alerts, and choose to receive the alert in your Volgistics mailbox and/or by email.
6. Click the save button.

An alert will be sent each time a new online application is submitted through this online volunteer application form. If you use several different online application forms, alerts may be sent to a different system operator for each form.

## **New annual Checklist items**January 2, 2010

When you setup Checklist items in Volgistics you can now create items that expire annually based on a volunteer's date of birth, or the anniversary of their start date. [More information \[pg:0916\]](#)

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## It's Time to Change Your Password

Help topic 2237

Added or revised 02-24-2006

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Your organization can require that you periodically change the password you use to access Volgistics. Changing your password periodically can improve security.

If your password expiration date is in the coming week, Volgistics shows you a message on the Welcome screen when you login to let you know that your password will expire soon. You can click the link in this message to change your password before it expires.

If you do not change your password before it expires, you'll receive a message that your password has expired when you login. If you receive this message you must enter a new password before you can access the system.

An expired password does not mean that your Volgistics account has expired. It simply means that you need to choose a new password for Volgistics. If it chooses to, your organization can optionally configure Volgistics so passwords do not expire.

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## Date of Last Activity

Help topic 2259

Added or revised 05-25-2006

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A volunteer's *date of last activity* is the latest date for which they have service recorded. You can use the *Date of last activity* field to determine how recently a volunteer participated.

If your account is configured to show the *Date of last activity* field, it appears in the Statistics box on the Core tab for each volunteer.

Statistics	Life:	YTD:	MTD:
Hours:	2,813:00	144:45	10:30
Years of service: 9 years, 4 months			
Date of last activity: 12-31-2006			

If the *Date of last activity* field does not appear in the Statistics box, you can use the [Statistics \[pg:1387\]](#) Setup page to add it.

Volgistics maintains each volunteer's *date of last activity* automatically based on their service records. You cannot edit the *Date of last activity* field directly, however each time you add, edit, or remove a volunteer service record, Volgistics updates that volunteer's *date of last activity* so it always shows the latest date for which service has been recorded. A volunteer's service records are listed in the Service box on the Service tab in their record.

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## Years of Service

Help topic 2261

Added or revised 05-25-2006

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Volgistics can automatically calculate and display each volunteer's years of service. You can use the Years of service field to see how long a volunteer has participated and as the basis for volunteer recognition. *Years of service* is displayed in years and months (e.g. 10 years and 6 months).

The *Years of service* field appears in the Statistics box on the Core tab for each volunteer.

Statistics	Life:	YTD:	MTD:
Hours:	2,495:15	100:15	42:00
Years of service:	10 years, 6 months		
Date of last activity:	12-31-2006		

If the *Years of service* field does not appear in the Statistics box, you can use the [Statistics \[pg:1387\]](#) Setup page to add it.

Volgistics maintains each volunteer's *years of service* automatically based on their status date records (when they became active, for example). You cannot edit the *Years of service* field directly, however each time you add, edit, or remove a status date record, Volgistics updates that volunteer's *years of service* field to reflect their status history. A volunteer's status date records are listed in the Dates box on the History tab in their record.

### How years of service is determined

Volgistics looks at each volunteer's *status* dates to determine how long they have been a volunteer. By default, Volgistics calculates a volunteer's years of service as the cumulative number of years and months they have been an 'active' volunteer: excluding any periods of time the volunteer was not active. *Years of service* is always as-of the current date.

For example, as-of January 1, 2007, a volunteer who became active on January 1, 2004 and is still active would have 3 years of service (3 years, 0 months). The status dates for such a volunteer would look something like this:

Dates						
	Event	Date	Expires	Notation		
Status	Active	01-01-2004			Edit	Delete
Status	Applicant	12-05-2003			Edit	Delete

Add

Add a:   date

In the Dates box shown above, the volunteer was an 'applicant' between December 5, 2003 and January 1, 2004. On January 1, 2004 they became an 'active' volunteer. So if the current date were January 1, 2007, the volunteer whose status dates are shown above would have exactly 3 years of service. The time they were an applicant (December 5, 2003 through January 1, 2004) is not counted under the default settings.

Similarly, if a volunteer's status changes from active to inactive, and then later back to active, the period of time they were inactive is **not** counted as part of their years of service *by default*. For example, if the volunteer whose record is shown above had been 'inactive' for a year, their years of service as-of January 1, 2007 would be 2 years instead of 3 years. This volunteer's status dates would look something this:

Dates						
	Event	Date	Expires	Notation		
Status	Active	01-01-2006			Edit	Delete
Status	Inactive	01-01-2005			Edit	Delete
Status	Active	01-01-2004			Edit	Delete
Status	Applicant	12-05-2003			Edit	Delete

**Add**

Add a:   date

In the Dates box shown above, the volunteer was an 'applicant' between December 5, 2003 and January 1, 2004. On January 1, 2004 they became an 'active' volunteer. On January 1, 2005 they became an inactive volunteer. Finally, on January 1, 2006 they returned and became an active volunteer again. If the current date were January 1, 2007, the volunteer whose status dates are shown above would have exactly 2 years of service. The time they were an applicant (December 5, 2003 through January 1, 2004), and the time they were inactive (January 1, 2005 through January 1, 2006) would not be counted under the default settings.

If you want

*years of service*

to also include the time a volunteer's status is something other than 'active,' you can configure Volgistics to include other statuses. You do this on the [Statistics \[pg:1387\]](#) Setup page. For example, if you have a status called 'Trainee,' and you want the *years of service* value to include the cumulative years a volunteer spends as either an 'active' volunteer or a 'trainee' volunteer you would configure this setup option as shown here:

## Years of service

Volgistics can calculate the number of years each volunteer has served. This statistic is often used as the basis for volunteer recognition.

Calculate 'years of service' as the total amount of time a volunteer's status is:

- Active
- Applicant
- Inactive
- Prospect
- Trainee

Save

Cancel

---

## How to Update Your Organization's Name

Help topic 2312

Added or revised 03-25-2015

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There may be times when the original name setup for your Volgistics account needs to be changed. For example, if your organization is acquired by a new organization or merges with another organization, or if your board of directors votes to change the organization's name. In these cases, there are a few things you will need to do to update your Volgistics account.

### Update the Account Name for Your Organization

To update your account's name:

1. Select [Setup \[pg:0887\]](#) from the menu.
2. Expand the *Account management* link.
3. Select *Agency information*.
4. Update the information on the page.
5. Click the **Save** button.

### Update Organization Name on Reports

All of your [stock \[pg:0595\]](#) and [custom \[pg:0467\]](#) reports automatically used the name of your organization in the title. So if your organization's name has changed, this will need to be updated. Here is an example of how to change the information for the *Assignment service details (stock)* report. Changing the other reports will require a similar process.



1. Select *Print* from the menu.
2. Expand the *Service details* link.
3. Select *Assignment service details (stock)*.
4. Click the **Modify it** button.
5. Select the *Page Design* tab if you are not on it already.
6. Change the title fields with your organization's new name.
7. Click the **Save** button on stock reports. On custom reports, go to the *Save* tab and click the **Save** button.

You will need to follow this process to update the title on all of the reports in your account.

### **Update Site Name**

In most cases, the name of the account is used as the name of a Site in the account. In this case, if the name of the organization changed you may also need to re-name the Site record that has the old name. If you need to do this:

1. Select *Assignments* from the menu.
2. Click on the Site record that you need to change.
3. Place your cursor in the Site name field, delete the old information and type in the new name of your organization.
4. Click the **Save** button.

If you need additional help with this, you may find [help topic 2268 \[pg:0137\]](#) useful.

### **Update Application Names**

You may have included the name of your organization in your application form titles. In this case, you can update these to the new name of your organization by:

1. Select [Setup \[pg:0887\]](#) from the menu.
2. Expand the *Online forms* link.
3. Select *Volunteer application forms*.
4. Select a form from the list.
5. Edit the title fields as necessary.
6. Click the **Save** button.

You will need to repeat these steps for each form that needs to be updated.

### **Update Content in Automatic Email Messages & Instruction Fields**

Volgistics has templates for automatic emails that are sent out. These could include things such as the [VicNet \[pg:1724\]](#) password emails, [Schedule Reminders \[pg:0791\]](#), and reminders sent out when [Checklist \[pg:0142\]](#) items need to be renewed. Your organization's name may have been placed into the message body for these emails by default, or you may have customized the message to include your organization's name. In either case,

you will need to edit the content to update the name of your organization.

Volgistics also has instruction fields for locations the volunteers access. For example, [application forms \[pg:0413\]](#), the [Opportunity Directory \[pg:0420\]](#), and the [VicNet \[pg:1724\]](#) and [VicTouch \[pg:1778\]](#) all have instruction fields. The system may have entered your organization's name into these fields by default, or you may have customized the message with your organization's name. You will need to edit the content of these fields with the new name of your organization to update them.

Due to the numerous locations the email templates and instruction fields could be, it would not be practical to detail how to get to the field to update the information in this help topic. If you need help locating one of these fields to update the information, please submit a [help inquiry \[pg:1902\]](#) letting us know where or when the volunteer sees the old organization name. We will be happy to give you directions on how to update the field.

### **Update Email Addresses If Necessary**

In many cases when an organization's name changes, their email addresses also change to match the new name. For example, your old email address may be "p.jones@hospital.org" but after the name change your email may be "jones.p@healthsystem.com." To make sure your account is up-to-date, you will need to update your email addresses recorded in the system.

#### Operator Record

The first location to change the email addresses is on the [System Operator \[pg:0065\]](#) records. This is the address that operators use to login with so if you are the [Administrator \[pg:0052\]](#) make sure you let your operators know they will need to use a new address to login with. To change an operator's email address:

1. Select [Setup \[pg:0887\]](#) from the menu.
2. Expand the *System Operators* link.
3. Select an operator's name from the list.
4. Edit the *Email address* field.
5. Click the **Save** button.

This will need to be done for each operator record in your account.

#### Reply-to Addresses

Your account also has *Reply-to* address fields that may need to be updated. [Help topic 2190 \[pg:0398\]](#) shows all the different locations that may have a *Reply-to* email address recorded.

#### Billing Contact

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## VicNet and VicTouch trials

Help topic 2534

Added or revised 02-19-2013

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[VicNet \[pg:1724\]](#) and [VicTouch \[pg:1778\]](#) are optional modules you can add to your account.

[Free trial accounts \[pg:0224\]](#) include the VicNet and VicTouch modules automatically so that organizations evaluating Volgistics can see how these features work. When you activate your account you can include, or omit, the modules in your [service level \[pg:0719\]](#) depending on your needs. You can always add these modules later if you do not want to include them in your service level initially.

If you do not include these modules in your service level, they are still available in your paid account but only on a trial basis. This makes it possible for organizations that have active Volgistics accounts where the modules are not included to evaluate VicNet and VicTouch.

To determine if your account includes these modules:

1. Choose [Setup \[pg:0887\]](#) from the [menu \[pg:0215\]](#).
2. Select *Account Management*.
3. Select *Account Status*. The *Service Level* section shows your current service level. The *Vic Activity* section shows you the number of VicNet logins and VicTouch transactions since these counters were reset.

You can also tell if VicNet and VicTouch are included by selecting Setup from the menu. When VicNet and VicTouch are not included in your service level, the word "trial" appears next to the name of the module(s) as shown below:



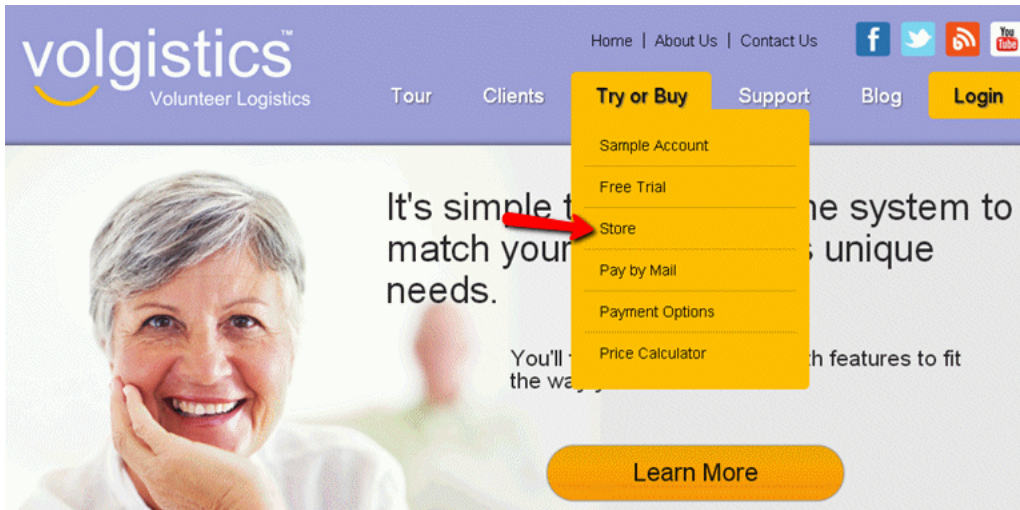
In this case, you can still setup the modules in your account and use them on a limited basis to evaluate them. [Help topic 1175 \[pg:1670\]](#) shows how to get started with VicNet and [Help topic 1184 \[pg:1755\]](#) shows how to get started with VicTouch.

When you use the VicNet module on a trial basis, you can access VicNet up to 15 times in a given month for the purpose of evaluating the module. You will see a *Trial* message each time you login. However, other than this message and the login limitation, VicNet will work the same way under the trial as it will when you add it to your account.

When you use the VicTouch module on a trial basis, you can complete up to 25 VicTouch transactions in a given month for the purpose of evaluating the module. You will see a *Trial* message on each transaction. However, other than this message and the transaction limitation, VicTouch will work the same way under the trial as it will when you add it to your account.

If you decide you would like to add either (or both) modules to your account, change your account's service level in the online Volgistics store. To add a module to your service level:

1. Visit [www.volgistics.com](http://www.volgistics.com).
2. Hover over Try or Buy in the menu at the top of the page and select Store.



3. Enter your Volgistics account number and your account credentials. Your account credentials may be either a [Volgistics Administrator's \[pg:0052\]](#) login name and password, or your account's [accounting access code \[pg:0728\]](#).
4. Click the "Change service level" link.

## Store Options

- [Account status](#)
- [Create an invoice and extend your service \(make another pre-payment\)](#)
- [Switch payment method to Automatic payment](#)
- [Order and payment history](#)
- [Change service level](#) ←
- [Change billing contact email address](#)

[Exit Store](#)

5. Select the "Yes" option for the Vic modules you want to add. At this point you will see what your new service fee will be. If you are ready to make the change to your service level, click the **Continue** button. Click the **Cancel** button if you do not want to change your service level at this time.

### Change service level to:

Volunteer records: up to  [Details](#)  
Archived volunteer records: up to  [Details](#)  
System operators: up to  [Details](#)

Include VicNet:	<input checked="" type="radio"/> Yes	<input type="radio"/> No	<a href="#">Details</a>
Include VicTouch:	<input checked="" type="radio"/> Yes	<input type="radio"/> No	<a href="#">Details</a>
Include VicDocs:	<input checked="" type="radio"/> Yes	<input type="radio"/> No	<a href="#">Details</a>

Monthly service fee: **\$ 96.00**

(That's \$ 3.15 a day)

New expiration date will be: **Monday, September 26, 2016**

Click Continue to confirm a change to your service level, or Cancel to exit without changing your service level.

<input checked="" type="button" value="Continue"/>	<input type="button" value="Cancel"/>
--	---------------------------------------

If you increase your service level and your account is set up for *Automatic payments*, Volgistics charges your account a prorated amount to cover the additional service fees for the remainder of the current billing period. Thereafter your account is charged at the new service level fee.

If your account is setup for *Pre-payments* and you increase your service level, Volgistics adjusts your account's expiration date based on the new daily service fee.

You can begin using VicNet or VicTouch without the trial limitations as soon as you complete these steps.

### Related help

[Help Topic 2002 \[pg:0710\]](#) - Volgistics Price List

[Help Topic 2027 \[pg:0719\]](#) - Service Levels

[Help Topic 2072 \[pg:0722\]](#) - How can I get a receipt for a payment?

[Help Topic 2074 \[pg:0723\]](#) - Has my payment arrived?

[Help Topic 2091 \[pg:0725\]](#) - How do I update or change my credit card information?

[Help Topic 2166 \[pg:0731\]](#) - How do I change the service level on my account?

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## Assuming the Role of Volgistics Administrator

Help topic 2535

Added or revised 04-03-2017

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Volgistics is an online system that offers unparalleled features in online volunteer recruitment, tracking and coordination. Each organization that uses Volgistics permits certain individuals (known as **System Operators** [\[pg:0065\]](#)) to access their Volgistics account. The **Volgistics Administrator** [\[pg:0052\]](#) is a System Operator who handles certain administrative functions, including system customization, control over volunteer information collection and storage, and responsibility for determining how much access other System Operators can have to the system.

This help topic is intended for people who have recently taken on the role of Volgistics Administrator in their organization. It offers some basic information about how to get started as a Volgistics Administrator.

You can click a link in the Contents box below to be taken directly to a section of the help topic.

## Contents

Taking on the Role of Volgistics Administrator

How to Update the Volgistics Administrator's Credentials

What if I don't know the previous Administrator's login information?

What a New Volgistics Administrator Should Do Once He or She Can Login

## Taking on the Role of Volgistics Administrator

Often as a matter of typical staff turnover, a volunteer manager may leave an organization and a new person may take over the role of managing an organization's Volgistics account. When this happens, the first thing the new volunteer program coordinator should do is add him or herself as a Volgistics Administrator and delete the System Operator credentials for the person who is no longer serving as a Volgistics Administrator for the organization.

*Please note that updating the System Operator information for your account is something that must be done from within your account--it is not something that the Volgistics support team can do for you. Please refer to the instructions below to update this information.*

### How to Update the Volgistics Administrator's Credentials

#### 1. Login as the former Volgistics Administrator for your account.

If the System Operator record for the former Volgistics Administrator is still stored in the system, you will need to log into Volgistics as that operator (or as another operator with access to [Setup \[pg:0887\]](#)) to update account access. Use the former Volgistics Administrator's login credentials (email address and password) to log in.

1. Go to [www.volgistics.com](http://www.volgistics.com).
2. Select *Login* from the menu at the top of the page.
3. Enter the account number, former Volgistics Administrator's email address, and his or her password. Or, you can enter the email address and password for another System Operator who has access to [Setup \[pg:0887\]](#) on the menu.

# Login

## Secure Login

Account number:

Email address:

Password:

[Forget your password?](#)

4. Click the **Login** button.
- 2. Create a new record or replace the former Administrator's information with your own.**
1. Once you're logged into the system, choose [Setup \[pg:0887\]](#) from the [menu \[pg:0215\]](#).
2. Expand the *System operators* link.
3. Click the *Create a new operator* link. If you get a page telling you that you cannot add a new operator because you do not have room, repeat steps 1 and 2 and then select the name of the Administrator you are replacing.
4. If you are making a new operator record for yourself, enter your information. If you were not able to make a new operator record, replace the former Administrator's information with your own. Make a careful note of the email address and password you enter because you will need to use it the next time you login.

### System Operator

#### New Administrator

Last name:

First name:

Email address:

Phone number:

Password:

Confirm password:

Operator must change their password when they login next

Time zone:

5. Also review your rights and email settings on this page.

**Be sure your user level is set to *Volgistics Administrator*.** You may find [help topic 1011 \[pg:1895\]](#) useful because it explains more about the settings on the page.

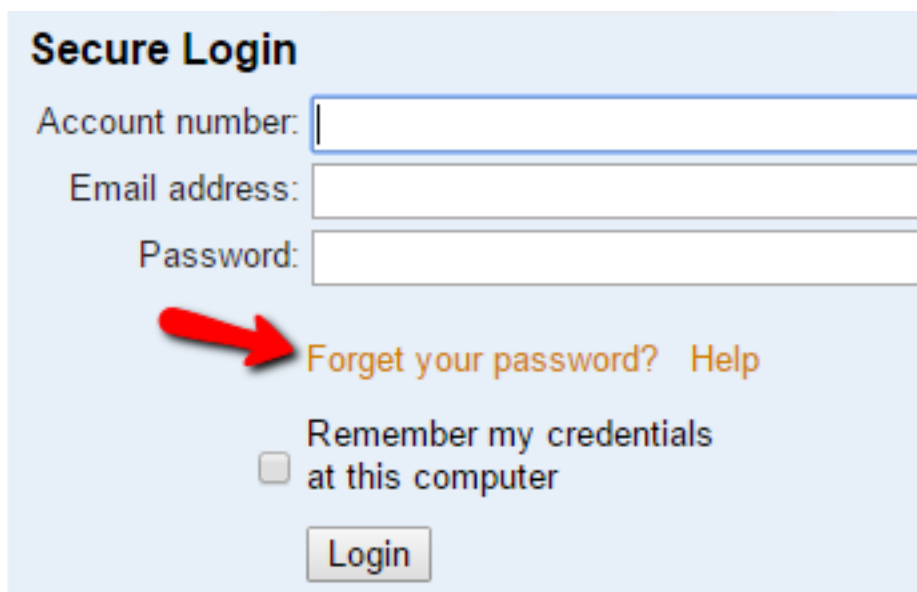
6. Once you have made all necessary changes, click the **Save** button at the bottom of the page.

Question: What if I don't know the previous Administrator's login information?

Answer: If no one in the organization can log in as an Administrator (for example, if the previous Administrator left the organization without passing on his or her login credentials), Volgistics staff cannot simply provide the previous Administrator's login information to anyone who asks. We hope you understand that this is necessary. Otherwise, anyone could simply ask for, and receive, an account's login information. This would eliminate the account's security.

One way an organization can deal with not knowing a previous Administrator's Volgistics password is if you (or someone else in your organization) has access to your predecessor's email address. With that person's email address, you can reset the former Administrator's password by taking the steps provided below:

1. Go to [www.volgistics.com](http://www.volgistics.com).
2. Select *Login* from the menu at the top of the page.
3. Click on the *Forget your password?* link beneath the blue Secure Login window.



**Secure Login**

Account number:

Email address:

Password:

[Forget your password?](#) [Help](#)

Remember my credentials at this computer

4. Enter the account number and email address associated with your organization's previous Volgistics Administrator. A link to set a new password will be sent to the email address you have provided as long as the email address entered matches the email address on the former Administrator's record.

5. Retrieve the email from the former Administrator's email account and click the link.

6. Enter a new password, and use it to login to Volgistics. You can find more information on how to do this in [help topic 1306 \[pg:0044\]](#).



Once you can login as the Volgistics Administrator, you can proceed with updating the Administrator's login credentials.

Alternatively, there may be other System Operators who have access to [Setup \[pg:0887\]](#) even if they are not Volgistics Administrators. Those operators can also reset the Volgistics Administrator login credentials. Simply log into Volgistics as another System Operator who has access to Setup, and you will be able to edit the personal information (name, email address, and password) for the Volgistics Administrator.

## **What a New Volgistics Administrator Should Do Once He or She Can Login**

### **1. Review who has access to your account.**

System Operators are the individuals in your organization who are permitted to access your Volgistics account. Once you can log into Volgistics, take the following steps to view the names of the other [System Operators \[pg:0065\]](#) for your account:

1. Choose Setup from the menu.
2. Expand the *System operators* link.
3. Beneath the *Accounting operator* on the list, you will see the names of the other individuals with System Operator credentials for your account.

Click on the name of one of your System Operators to learn more about his or her rights in the system. You can learn more about how to control operator rights and access in [help topic 2028 \[pg:0053\]](#).

### **2. Review your account's service level and payment method.**

An account's [service level \[pg:0719\]](#) determines how many volunteer records that organization can manage in Volgistics, the number of [archived \[pg:0709\]](#) volunteer records that can be stored, the number of [System Operators \[pg:0065\]](#) that can be established, and if the optional [VicNet \[pg:1724\]](#), [VicTouch \[pg:1778\]](#), or [VicDocs \[pg:1648\]](#) modules are used.

Volgistics is paid for by a monthly service fee. This fee includes access to Volgistics for each of your System Operators; automatic data backup; online application forms and opportunity directory; and online technical support. There are no software or licensing charges.

There are two [payment options \[pg:0733\]](#) for the monthly Volgistics service fee. You can either make automatic monthly payments, which are charged to a credit card, or you can pre-pay with a credit card or check. The easiest way to pay is with the automatic payment option.

To check your account's service level and payment information:

1. Choose [Setup \[pg:0887\]](#) from the menu.
2. Expand the *Account management* link.
3. Click on *Account status*.

This page displays the payment information, paid through date, service level, space available and [VicNet \[pg:1724\]](#), [VicTouch \[pg:1778\]](#), or [VicDocs \[pg:1648\]](#) activity associated with your Volgistics account. It also provides information on [how to change your service level \[pg:0731\]](#).

### **3. Update your reply-to addresses.**

Your account may have reply-to addresses for the old Administrator recorded. You will want to update these to use your email address (or another email address you want replies to go to). You can find information on how to locate and change the reply-to email addresses in [help topic 2190 \[pg:0398\]](#).

#### 4. Change your billing contact.

Each account has a billing contact email address listed. This is the email that important account information messages such as renewal reminders, billing reminders, transaction confirmation notices, and account status messages are sent to.

If you are a part of a large organization, this address may be someone in a corporate accounts payable department who is not even associated with the volunteer program. Or, if you have a smaller organization, this may be a board member such as a treasurer. In many accounts, the billing contact is same as the account's Administrator.

As the new Administrator, you will want to find out what email address is listed for the billing contact and update this if necessary. You can find directions on how to do this in [help topic 1019 \[pg:0706\]](#).

#### 5. Get Familiar with Volgistics.

Explore the Getting Started Guide. The [Getting Started guide \[pg:0222\]](#) is an online documentation series that teaches you how to begin working with the Volgistics system. It answers basic questions about the system's reliability and security characteristics; using Volgistics to track and schedule volunteers; familiarizing yourself with the optional VicNet, VicTouch, and VicDocs modules; and customizing Volgistics to meet your organization's specific needs. A new user should read through the Getting Started guide as time permits. Even if they are not updating their account's information, it is useful to review how this can be done in case you need to do it in the future.

Join Us for a Demo. The Volgistics support team hosts an online demonstration of the system twice a week. Even though you already have an account, we invite you to join us because a demonstration is a great way to see how the different pieces of the system work together to make your job as a volunteer manager easier. During the session, we give an overview of the Volgistics system and there is time for questions and answers at the end. If you'd like to register to attend a demo, just go to the following URL address: [www.volgistics.com/demo.htm](http://www.volgistics.com/demo.htm). You'll receive an email message with information on how to join the session after you register. We look forward to meeting you!

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## Removing VicNet or VicDocs from Your Account's Service Level

Help topic 2551

Added or revised 02-10-2016

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Removing [VicNet \[pg:1724\]](#) or [VicDocs \[pg:1648\]](#) from your account's [service level \[pg:0719\]](#) can have an impact beyond simply lowering your account's monthly service fee, and removing your ability to access the modules. This help topic outlines the impact of removing the optional modules, and the additional steps that must be taken when you remove the features.

You can go directly to a section of the help topic by clicking the link in the *Content* box below.

### Contents

[Removing VicNet from Your Service Level](#)

[Removing VicDocs from Your Service Level](#)

## Removing VicNet from Your Service Level

Changes to an account's service level must be made in the Volgistics Store for the account. If you need help with how to access the Store to change the service level, please see [help topic 2166 \[pg:0731\]](#).

Normally when you remove VicNet from your account's service level, it simply means that your account will be limited to using VicNet on a [trial basis \[pg:0082\]](#). This means your volunteers and [Coordinators \[pg:1922\]](#) can only access VicNet a total of 15 times (for the entire account) each month and after this no one will be able to use VicNet until the count resets on the first of the following month.

However, if your account has [text messaging enabled \[pg:0321\]](#), and you try to remove VicNet, a message will appear to let you know that you cannot remove VicNet until you disable text messaging first. The reason for this is that VicNet is required to allow volunteers and Coordinators to do things such as opt-in to text messaging and change their message preferences.

If you see a message that you cannot remove VicNet, an [Administrator \[pg:0052\]](#) level System Operator will need to follow the directions shown in [help topic 1294 \[pg:0342\]](#) to disable text messaging. After text messaging has been disabled, you will be able to remove VicNet from your service level.

## Removing VicDocs from Your Service Level

Changes to an account's service level must be made in the Volgistics Store for the account. If you need help with how to access the Store to change the service level, please see [help topic 2166 \[pg:0731\]](#).

When you remove VicDocs from your account's service level, the end result is that documents uploaded to volunteer, [Coordinator \[pg:1922\]](#), and [Site, Place, and Assignment \[pg:0096\]](#) records will no longer be available. Here is how this works:

- Access to the Docs tab on Coordinator, Site, Place, and Assignment records will be removed. Operators will still be able to see the Docs tab on volunteer records (if their rights allow).
- Operators will be able to see documents that have been uploaded on the Docs tab of volunteer records (if their rights allow) for 5 days after VicDocs is removed. However, they will not be able to open any documents except the PDF files for completed application forms.
- If you add VicDocs back to your service level within 5 days from the date it is removed, access to the Docs tab on all types of records, and the documents on these tabs, will be restored.
- When you remove VicDocs, there will be an option to have all documents in the account saved to a zip file.
  - The zip file will be available on the [In Box \[pg:1917\]](#) tab of your Volgistics mailbox for you to download to your local system, but this must be done within 5 days from the date VicDocs is removed. After 5 days, the zip file will no longer be available.
- After 5 days pass from the time VicDocs is removed, the system will automatically clear all documents from the account except for the PDF files for completed volunteer application forms. After this occurs, if an account wishes to use VicDocs again, they will need to upload each document individually to each record's Docs tab again.

Because of the ramifications listed above, Volgistics requires an [Administrator \[pg:0052\]](#) level System Operator to remove VicDocs from an account's service level. The radio button to remove VicDocs will be disabled unless the person accessing the Store has logged in to the Store using the email address and password of an Administrator. The Administrator will need to verify that VicDocs should be removed by entering her or his password.

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## HIPAA

Help topic 8273

Added or revised 02-08-2016

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HIPAA is the Health Insurance Portability and Accountability Act

Enacted in August 1996, the Health Insurance Portability and Accountability Act (HIPAA) requires the Department of Health and Human Services to adopt national uniform standards for the electronic storage and transmission of certain health information, such as insurance claim, enrollment, eligibility, payment, and coordination of benefits information. These kinds of information are generally known as *protected information* under HIPAA.

Under this Act, the federal government has developed specific regulations that govern the security measures that must be taken to protect the electronic storage and transmission of medical insurance records. Computer systems - from database programs to network infrastructures - used to store or transmit protected information must meet certain standards. In addition, organizations that generate, use, or store protected information must adopt certain internal procedures to ensure the protection of these kinds of a data.

*Volgistics is intended for managing information about **volunteer** personnel. As such, it is not a Covered Entity for HIPAA regulations. Volgistics is designed to track volunteer information, so it is typically not used to store, process, or transmit HIPAA protected information.*

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## Site Level Access

Help topic 2035

Added or revised 10-18-2012

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In some organizations it is useful to have a single volunteer database in which different users have access to only some of the volunteer records. Volgistics makes this possible through a feature known as *Site Level Access*.

With site level access, an organization creates two or more Sites in their Volgistics database, and then makes one or more [system operators \[pg:0065\]](#) a [Site Level Operator \[pg:1442\]](#) for a specific site (see [Setup site level access \[pg:0093\]](#)). When a 'Site Level' Operator uses Volgistics, they only 'see' the volunteers associated with their own site, not the volunteers associated with other sites. To these 'Site Level' Operators, Volgistics appears to include only the volunteers for their Site. At the same time, Volgistics operators who have not been given a Site Level restriction can see and work with all of the volunteer records from all of the Sites when they login.

When you use Site Level Access:

- The headquarters site can establish certain database and recordkeeping standards. This can help you apply organization-wide volunteer management policies and keep information consistent, an important task if you want to generate organization-wide reports and statistics. These database standards can include the choice of which fields you use; what dropdown list (look-up table) entries are created; who can access the system and what they can do; and the creation of organization-wide reports including letters, service reports, and statistics.
- Volgistics is even easier for Site Level Operators to understand and use, since some or all of the administrative functions are performed for them. This is especially beneficial in organizations where volunteer management is just one of many responsibilities the Site Level Operators have.
- When Site Level Operators generate reports, their reports include just their site's volunteers.
- Headquarters can generate reports that include all volunteers from all sites.
- System operators have access to either *all Sites*, or just to *one Site*. There is not a way to create system operators who have access to multiple Sites but not all Sites.

These are some examples of organizations in which this Volgistics feature is useful, and how it might be used:

- A health care network has three different local hospitals under its umbrella. Each hospital has a volunteer coordinator and a cadre of volunteer personnel. The main hospital serves as the headquarters, and the volunteer coordinator there has administrative responsibility for the volunteer programs at all three hospitals. This headquarters administrator wants to have access to volunteer records and statistics for all three facilities, to be able to set volunteer record keeping standards for the entire health care network, and to give the volunteer coordinators at the other hospitals access only to the records for the people who volunteer at their facilities.

In this example the headquarters administrator creates one Site in Volgistics for each of the three hospitals, and then creates one (or more) Volgistics system operators for each site.

- A state-wide child welfare agency has an employee in each county whose responsibilities include coordination of the local volunteers who assist the agency. At the state capital, an overall volunteer administrator needs to monitor volunteer background check results for volunteers statewide, to be able to produce state-wide volunteer statistical reports, and set volunteer record keeping standards for the volunteer coordinators in all counties. At the county level, the agency's volunteer coordinators need to be able to track, schedule, and communicate with their volunteers, but at this level they need only need access to the volunteers from their

- own county.

In this example, the state wide volunteer administrator creates one Site in Volgistics for each county, and then creates a Volgistics system operator for each county.

- A national environmental education group has several dozen volunteer teams in local communities around the country. Each team has a coordinator who needs the ability to manage volunteer records for their own region. At the national office, an overall volunteer leader wants to provide a standardized volunteer record keeping system to all of its regional coordinators, and to be able to tap into information about the specialized skills of volunteers from all of the local regions while traveling around the country.

In this example, the national leader creates a Volgistics Site for each region, and a Volgistics system operator for each of their regional coordinators.

While Site Level Access provides great convenience, it may not (and is not intended to) provide a level of security in which operators at one site could never discover any information about volunteers from another site *in the same Volgistics account*. For example, when a volunteer serves at more than one site in the same Volgistics account, their record is shared between those sites. In this case the operators at the sites sharing the volunteer are privy to some common information about that volunteer. In addition, there are reporting features in Volgistics that enable the headquarters site to create reports that list all volunteers for all sites (if they choose to). The headquarters site could then make these reports available to all system operators at all sites.

A good rule of thumb is this: when you use Site Level Access, your system operators should be people you would trust with any volunteer information in your account, even if they normally only see their own volunteer records.

If you need a higher level of security between the different sites in your organization, use separate Volgistics accounts for each site. With separate accounts you can be sure operators from one account will never see information in another, however you'll no longer have the advantages of a common database.

To learn more about using this feature, see [Setup Site Level Access \[pg:0093\]](#) and [Manage Site Level Access \[pg:0094\]](#).

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## Setup Site Level Access

Help topic 2036

Added or revised 02-14-2012

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To setup [Site Level Access \[pg:0092\]](#):

If you've not already done so, start by creating a Site record in Volgistics for each of the locations you want to have Site Level Access:

1. Choose Assignments from the [menu \[pg:0215\]](#).
2. Click "Add a new Site."
3. Enter the name of the Site in the 'Site' field, then any additional information you want to record on the Site tab (such as the location).
4. Click the Save button to save the new Site.

Repeat this process for each Site. After you've created each Site you can optionally enter each Site's assignments. Alternatively, you can let the Volgistics operators at each Site enter their own assignments.

Next, [create at least one System Operator \[pg:1440\]](#) for each Site.

Each time you create new System Operators, you choose if you want them to see all of the volunteer records in the database, or only the volunteers for a particular Site. (System Operators have access to either *All Sites*, or just to *one Site*. There is not a way to create System Operators who have access to multiple Sites but not all Sites). Usually, just the System Operator(s) at your headquarters location would be permitted to see all of the records for all Sites, while the System Operators for individual Sites would be allowed to see just their Site's volunteers.

To create a new System Operator:

1. Choose Setup from the [menu \[pg:0215\]](#).
2. Click 'System Operators' to see the list of existing users.
3. Click 'Create a new operator' (or click the name of an existing operator).
4. Enter the operator's name, contact information, login name and password.
5. Use the 'Site' field to choose the Site you want this operator to see. If you want this operator to see all of the volunteers in the system choose 'All Sites.'
6. Click 'Save' to save the new operator record.

To learn more about using Site Level Access once it has been setup, see [Manage Site Level Access \[pg:0094\]](#).

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## Manage Site Level Access

Help topic 2037

Added or revised 02-14-2012

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If you haven't setup your Volgistics database for [Site Level Access \[pg:0092\]](#), read [Setup Site Level Access \[pg:0093\]](#) first.

Once you've setup at least one [System Operator \[pg:1895\]](#) with a Site restriction, the Core tab in each volunteer's record will include a 'Sites' box, like the one pictured below. This Sites box does not appear until you've setup at least one System Operator whose Site is not 'All sites.'

The Sites box shows you which site(s) the selected volunteer belongs to. To see this in your database, select any volunteer record and view their Core tab. This is an example of the 'Sites' box for a 'Northside' volunteer:



Under Site Level Access the volunteers you track can be...

- a. Not associated with any Site.

- b. Associated with a single Site, as in the above example.
- c. Associated with multiple Sites.

When a volunteer is not associated with any sites, their 'Sites' box is empty, like this:

The screenshot shows a light blue header bar with the word "Sites" in bold. Below it, there is a "Site:" label followed by a dropdown menu with a downward arrow and a "Save" button.

A volunteer associated with multiple sites ('Northside' and 'Southside' in this example) would have a 'Sites' box that looks like this:

The screenshot shows a light blue header bar with the word "Sites" in bold. Below it, there are two text boxes: "Northside" and "Southside". To the right of each text box is a "Delete" button. Below these, there is a "Site:" label followed by a dropdown menu with a downward arrow and a "Save" button.

### Headquarters volunteers

If your organization has some volunteers who serve at a 'headquarters' Site, consider creating a Site in your database called 'Headquarters.' Then associate those volunteers with the headquarters Site. At headquarters, you can create a Volgistics System Operator who has access only to the 'Headquarters' Site. This user would then see just the 'Headquarters' volunteers.

### Establishing or changing a volunteer's Sites

#### At headquarters...

Users at headquarters (those who can see all the records in the system), can establish or change a volunteer's Site simply by adding or deleting Sites from the 'Sites' box.

For example, if headquarters wants to add a new volunteer record to the database and 'assign it' to a particular Site, the operator at headquarters simply chooses the desired Site from the 'Site' field on the 'Sites' box for the new volunteer. As soon as headquarters saves the new volunteer record it becomes visible to the Volgistics operators at the volunteer's Site, but not at other Sites.

If headquarters wants to end a volunteer's association with a given Site, the headquarters operator simply clicks the 'Delete' button *next to the Site name in the 'Sites' box*. As soon as headquarters deletes a Site from the 'Sites' box, Volgistics operators at that Site no longer see that volunteer record.

When a volunteer's Site is changed or deleted, the rest of the volunteer's record remains the same. For example, volunteer hours entered at the original Site will still appear in their record even after the record is transferred to a new Site.

Operators at headquarters can transfer a volunteer record from one Site to another simply by deleting the old Site, and adding the new Site.

#### At a Site...

When a Site Level Operator adds a new volunteer to the database, the new volunteer record automatically has an association with the System Operator's Site. Users at that Site and headquarters can see this newly added record; however users at other Sites cannot.



For example, if 'Jennifer' is a Volgistics System Operator with Site Level Access for the 'Northside' Site, and Jennifer adds a new volunteer record for a volunteer named 'George Bailey,' then George Bailey is automatically shown to be a 'Northside' volunteer in the 'Sites' box on the Core tab in his record. Jennifer does not have to add this herself. Given his association with the 'Northside' Site, George Bailey's volunteer record will be visible only to operators at headquarters (because they can see all volunteer records for all Sites), and the Northside (because George is a Northside volunteer), not any other Sites.

Sharing...

If a volunteer serves at more than one Site, each of their Sites share the volunteer's record.

If the volunteer (or a Volgistics operator) changes their address in the database, the change is instantly visible to all of the Sites that share the volunteer.

If a System Operator at a remote Site is allowed to delete volunteer records, and they choose to delete a volunteer record for a volunteer that serves *only at their own Site*, the volunteer record is deleted.

If an operator at a remote Site is allowed to delete volunteer records, and they choose to delete a volunteer record for a volunteer that serves at multiple Sites, the volunteer record will no longer be associated with the Site where they have been deleted (and therefore appear to have been deleted from that Site's database), however the record remains in the database and it is still accessible to the other Site and to headquarters.

If a headquarters operator is allowed to delete volunteer records, they can delete any volunteer record no matter how many other Sites the record is associated with.

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## Tracking Assignments

Help topic 2099

Added or revised 10-03-2016

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In most volunteer programs, volunteers perform a variety of tasks. And most volunteer leaders like to keep track of what task each volunteer performs. Tracking assignments is important if you want to use Volgistics to produce job rosters, print reports that show the number of hours served in each assignment, keep track of what task each volunteer performs for your organization, determine where volunteers are needed when scheduling or placing volunteers, etc.

Setting up Assignments properly is important to unlocking the power of Volgistics. This help topic provides an overview of how the Assignment file works, spells out the three options you have for organizing assignments in Volgistics, and helps you to determine how your agency organizes volunteer jobs.

### Assignments

Assignment is the term Volgistics uses to describe the various tasks volunteers perform in your organization. Some people use the terms "job," "work area," "project," "opportunity," or "position" to mean the same thing.

Volgistics provides a variety of features for tracking your volunteer assignments, and coordinating volunteer efforts within them. For example, you can keep job descriptions; inventories of the skills or certifications required to serve in the assignment; lists of qualified, interested, and assigned volunteers; volunteer schedules; and more.

How many of these assignment tracking capabilities you use may depend on the needs of your organization. At the very least you should plan on entering the name of each assignment.

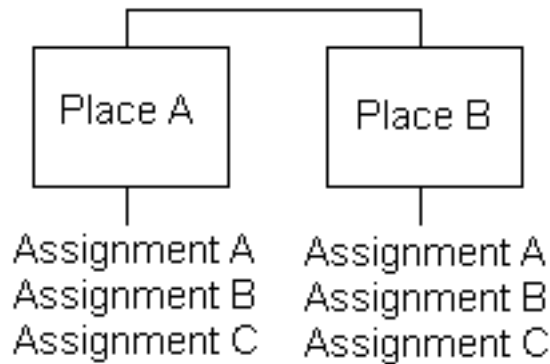
## Sites & Places

In addition to tracking information *about* volunteer assignments, Volgistics gives you ways to *arrange* assignments into organizational groups, or locations, if you need to.

Volgistics provides two organizational features called *Sites* and *Places* to help you do this. Exactly what 'Sites' and 'Places' will represent in your organization is something you can choose, depending on your needs. You may choose to use only 'Places,' you may choose to use both 'Sites,' and 'Places,' or you may not need to use either. The balance of this help topic explains more, and can help you choose what's best for you.

### Places

If your volunteer assignments occur at more than one location, or if your organization has multiple internal departments or divisions, you may want to arrange your volunteer assignments accordingly. Volgistics lets you define multiple 'Places' for this purpose. Once you define a Place you can begin adding volunteer assignments 'under' it. Here's a simple organizational chart that shows an example of a volunteer program with two places, A and B. In this example Place A and Place B each has three assignments, A, B, and C.



Although Places might be different physical locations (such as branch locations, parks, counties, states, provinces), they don't have to be. They can also be organizational units such as departments or agencies.

You can create the same assignments under different Places, different assignments under different Places, or any combination of the two.

Why organize assignments this way?

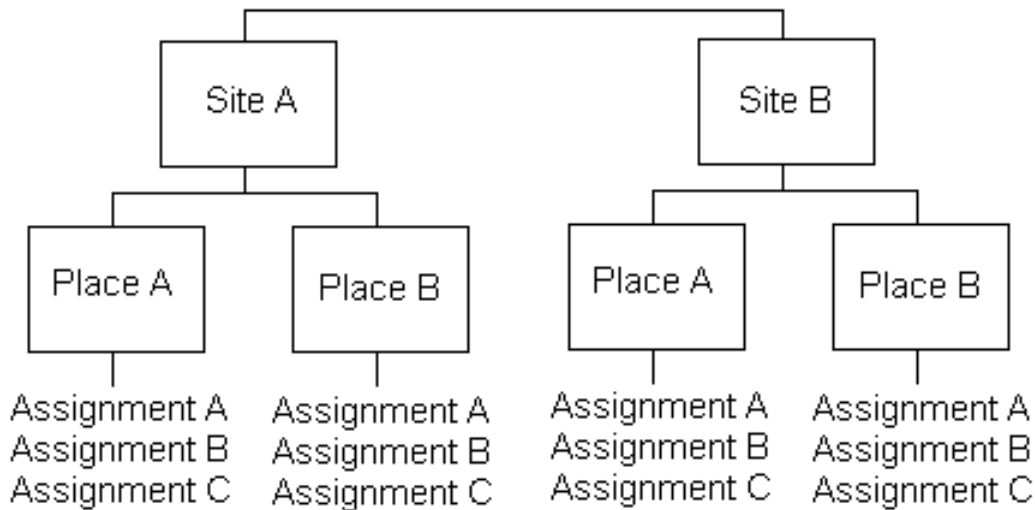
- It makes it easier to identify or locate assignment records
  - You can send email or text messages to (or print reports for) all of the volunteers who have an assignment at a specific Place.
  - You can sort some volunteer, service, and schedule reports according to Place
  - You can let visitors to your web site search for volunteer opportunities by Place
- These are some examples of how organizations might arrange their volunteer assignments into Places:

- A Parks department creates a Place for each park, and then organizes its assignments by park. Visitors to the department's web site can search for an assignment by park.

- A Hospital creates a Place for each internal department, and then organizes assignments by department. The hospital can print volunteer service reports by department.
- A performing arts center creates a Place for each venue, and then organizes assignments by Venue. The center can print a volunteer schedule for each venue.
- A political campaign creates a Place for each district, and then organizes assignments by district. They can send email or text message announcements to volunteers according to the district they serve.

### Sites

While tracking assignments according to *Place* may be adequate for many volunteer programs, others may need an additional level of organization. This is known as the *Site* in Volgistics. Sites provide one higher level of organization, as illustrated in this organizational chart:



If the Places that have your volunteer assignments occur at more than one location, in different agencies, or if they are coordinated by individual volunteer leaders, consider using "Sites."

You can create the same Places under different Sites, different places under different Sites, or any combination of the two.

Why organize Places this way?

- It makes it easier to identify or locate assignment records
- You can send email or text messages to (or print reports for) all of the volunteers who have an assignment at a specific Site.
- You can sort some volunteer, service, and schedule reports according to Site.
- You can let visitors to your web site search for volunteer opportunities by Site.
- You can use the [Site Level Access \[pg:0092\]](#) feature so that some of your [System Operators \[pg:1895\]](#) only see the volunteers assigned to a specific site.

These are some examples of how organizations might arrange their volunteer assignments into Sites and Places:

- A city government creates a Site for each city department, and a Place for each location where assignments occur within each department. For example, the Parks department creates a Place for each park, and then organizes its assignments by park. Visitors to the city's web site can search for an assignment by department, as well as location. Volgistics System Operators in each department see just the volunteers assigned to their department.
- A health care network creates a Site for each hospital in its network. Each of these hospitals creates a Place for each of their internal departments, and then organizes assignments by department. The health care network can print volunteer service reports by Hospital (and each hospital's departments). The System Operators at each hospital see just the volunteers assigned to their hospital.
- A volunteer center creates a Site for each agency that has volunteer assignments. Within each agency they create Places for the various programs or departments where assignments occur. Visitors to the volunteer center's web site can search for assignments by Agency, and then program. The volunteer center can report the number of volunteers referred to each Agency.
- A convention and visitor's bureau creates a Site for each event they coordinate. Within each event they create Places for the various activities associate with the event, and within each activity they list the assignments performed. The bureau can produce volunteer schedules by event, activity, or individual assignment; and they can easily communicate throughout the year with the volunteers associated with individual events.

Do you need Sites or Places?

What if your organization does not have sites and/or places? You do not have to create site and place records if they do not apply to your organizational structure.

In very simple volunteer programs there's often no need to organize volunteer assignments any further than a single list. For example, a small animal adoption center with a single location might have just three or four volunteer assignments, like these:

Veterinarian  
Adoption counselor  
Animal care  
Fund raiser

In this kind of organization there is probably no need to use the Site and Place features. That's OK, there's still plenty to be gained by tracking just the assignments.

Understand your organization first

If your organization has more than a few dozen volunteers or assignments, multiple locations, or if it encompasses other agencies, understanding the different ways of organizing volunteer assignments is very important to making the most of Volgistics and working efficiently with your information. Also, since you should organize your volunteer database to reflect or compliment the actual structure of your organization, you need to understand – or define – your organization's structure before you setup your assignments in Volgistics.

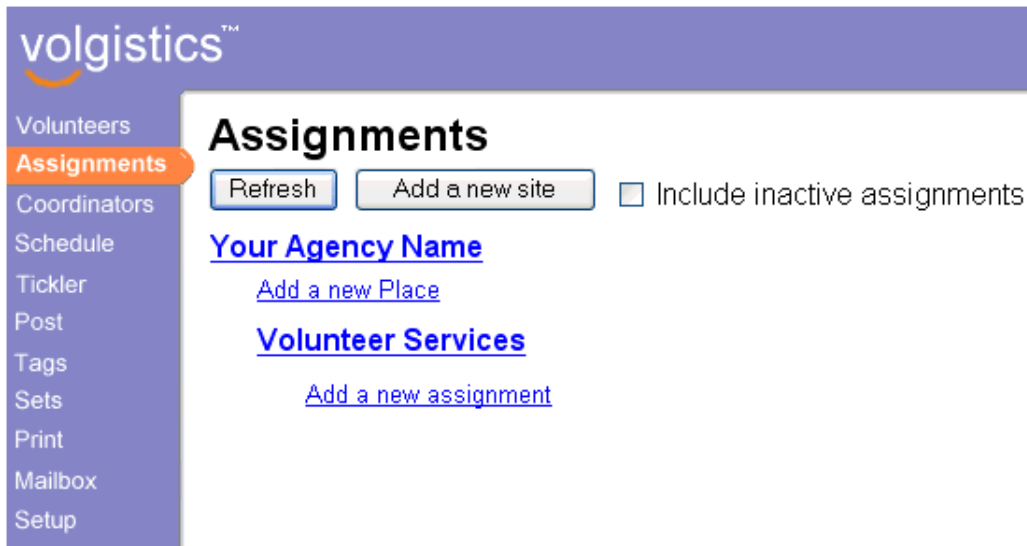
Before continuing you should decide

1. If you will initially track Assignments only; Places and Assignments; or Sites, Places, and Assignments. Start with what you need now, you can always grow to another level later.
2. If you want to track Places, you should have an initial list of Places, and which assignments will go under each place. You can always add more places and assignments later.

3. If you want to track Sites, you should have an initial list of what your sites are, and which Places will go under each site. You can always add more sites later.

### How Assignments appear in Volgistics

To view the volunteer Assignments in your Volgistics database, choose Assignments from the [menu \[pg:0215\]](#). If you're just getting started, your Assignments list will look something like this:



By default, every new Volgistics system includes one initial Site, titled with your organization's name, and one initial Place called 'Volunteer Services.' If you choose *not* to track Places or Sites in your database, simply leave these default entries as they are, and click "Add a new assignment" to begin adding assignment records.

If you choose to track Places in your database, you can re-name the default Place record to suit your needs. You can create additional Place records by clicking the "Add a new Place" link. To add new Assignment to a particular Place, click the "Add a new assignment" link that appears beneath the name of the Place.

If you choose to track Sites in your database, you can re-name the default Site record to suit your needs. To add new Site records click the **Add a new site** button. To add a new Place record to a particular Site, click the "Add a new place" link that appears beneath the name of the Site.

Volgistics lists the assignments you enter alphabetically, as shown here:

volgistics™

Volunteers  
**Assignments**  
 Coordinators  
 Schedule  
 Tickler  
 Post  
 Tags  
 Sets  
 Print  
 Mailbox  
 Setup  
 Welcome  
 Help  
 Exit

## Assignments

[Refresh](#) [Add a new site](#)  Include inactive assignments

[Your Agency Name](#)  
[Add a new Place](#)

[Volunteer Services](#)  
[Antique sale heper](#)  
[Information desk](#)  
[Library cart](#)  
[Meal delivery](#)  
[Tour guide](#)  
[Tutor](#)  
[Add a new assignment](#)

If you track Places in your database, the Assignments list shows each of your Places, sorted alphabetically. The list of Assignments at each Place appears indented, beneath the Place name. The following illustration shows an organization that has two Places, "Direct services" and "Support services," with several assignments under each Place:

volgistics™

Volunteers  
**Assignments**  
 Coordinators  
 Schedule  
 Tickler  
 Post  
 Tags  
 Sets  
 Print  
 Mailbox  
 Setup  
 Welcome  
 Help  
 Exit

## Assignments

[Refresh](#) [Add a new site](#)  Include inactive assignments

[Your Agency Name](#)  
[Add a new Place](#)

[Direct services](#)  
[Library cart](#)  
[Meal delivery](#)  
[Tour guide](#)  
[Tutor](#)  
[Add a new assignment](#)

[Support services](#)  
[Antique sale heper](#)  
[Information desk](#)  
[Add a new assignment](#)

If you track Sites in your database, the Assignment list shows each of your Sites, sorted alphabetically. The list of Places at each Site appears indented, beneath the Site name. The following illustration shows an organization with two Sites, "Northside" and "Southside:"

**volgistics™**

Volunteers  
**Assignments**  
 Coordinators  
 Schedule  
 Tickler  
 Post  
 Tags  
 Sets  
 Print  
 Mailbox  
 Setup  
 Welcome  
 Help  
 Exit

## Assignments

[Refresh](#) [Add a new site](#)

**Northside** — Site

[Add a new Place](#)

**Direct services** — Place

[Library cart](#) — Assignment

[Meal delivery](#) — Assignment

[Tour guide](#) — Assignment

[Tutor](#) — Assignment

[Add a new assignment](#)

**Support services** — Place

[Information desk](#) — Assignment

[Add a new assignment](#)

**Southside** — Site

[Add a new Place](#)

**Volunteer Services** — Place

[Antique sale heper](#) — Assignment

[Information desk](#) — Assignment

[Add a new assignment](#)

### Step-by-step

You can find step-by-step instructions on how to perform the tasks discussed in this help topic in these locations:

- [Help Topic 2215 \[pg:0106\]](#) - Add an Assignment
- [Help Topic 2216 \[pg:0108\]](#) - Add a Place
- [Help Topic 2217 \[pg:0110\]](#) - Add a Site
- [Help Topic 2218 \[pg:0112\]](#) - Reorganize Sites, Places, or Assignments

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## Roles

Help topic 2173

Added or revised 10-03-2016

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If you use Volgistics to [track Assignments \[pg:0096\]](#), you can also specify what *roles* volunteers have in each of their assignments.

These are some examples of different roles a volunteer might have in an assignment:

- Assigned

The volunteer currently serves in this assignment, or is qualified to serve in the assignment. In other words, this is what the volunteer currently does.

- Preference

Use the 'Preference' role to show that the volunteer would be willing to serve in a particular assignment.

- Trainee

In some organizations, new volunteers serve in an assignment as a trainee for some period of time before that are given the assignment permanently. In this case a volunteer's role in an assignment could be 'trainee.'

- Former

The volunteer was previously assigned to this assignment, but is no longer. Tracking a volunteer's 'former' assignments isn't always necessary, but the role of 'Former' can be used in situations where it's useful to see which assignments a volunteer previously served in. Changing a volunteer's role from 'Assigned' to 'Former' in a particular assignment allows you to preserve a history of the volunteer's past assignment, without having the volunteer appear in lists of people who are currently assigned to the job.

- Substitute

If you use the Volgistics scheduling features rigorously you may want to track the substitutes for individual assignments. In this case a role called 'Substitute' can be used to indicate that a volunteer is available to substitute when needed for a particular assignment.

### Where Roles are tracked

When a system operator [adds an Assignment \[pg:0193\]](#) to a volunteer's Service tab, they indicate the volunteer's Role in that Assignment by selecting the appropriate Role from the dropdown list in the "Add" box.

#### Add

Assignment:  ▼

Role:  ▼

From:   To:



Once the **Save** button is clicked, the Assignment entry becomes part of the list of Assignment list on the Service tab.

Speaker's Bureau [Headquarters\Administration]	Assigned		<a href="#">Edit</a>	<a href="#">Delete</a>
---	----------	--	----------------------	------------------------

To change a volunteer's Role in an Assignment, click the orange "Edit" link, select the new Role from the dropdown list, and save your changes.

It is also possible for a volunteer to have more than one Role in an Assignment. To give a volunteer an additional Role in an Assignment, add a new Assignment entry, choosing the same Assignment and a different Role.

### **View volunteers according to their role**

If you track roles, it's easy to see which volunteers have a particular role in any Site, Place, or Assignment.

1. Choose Assignments from the [menu \[pg:0215\]](#).
2. Select any Site, Place, or Assignment.
3. Click the Volunteers tab.
4. Locate the Include field near the bottom and select "These volunteers."
5. Locate the

#### Status


and











#### Role

sections. Use the checkboxes in these two sections to choose the volunteer status(es) and role(s) you want to include (Volunteer [Status \[pg:1832\]](#) is tracked on the Core tab, and it represents the volunteer's overall relationship to your organization – such as 'active' or 'inactive.' Their Role in an assignment is different: it describes where the volunteer stands in relation to a certain assignment).

6. Click the **Refresh** button.

For example, if you want to see a list of all of the volunteers whose Status is Active and whose Role in this assignment or any assignment at this Site or Place (if you've selected a Site or Place record) is either Assigned or Substitute you would configure these checkboxes as shown here:

**Volunteers**  Messages

Tag	Volunteer	Role	New role	
<input type="checkbox"/>	 <a href="#">Burger, James</a>	Assigned	Assigned ▼	Delete
<input type="checkbox"/>	 <a href="#">Hawkins, Sandra</a>	Assigned	Assigned ▼	Delete
<input type="checkbox"/>	 <a href="#">Nowicki, Judith</a>	Assigned	Assigned ▼	Delete
<input type="checkbox"/>	 <a href="#">Padilla, Lula</a>	Substitute	Substitute ▼	Delete
<input type="checkbox"/>	 <a href="#">Plemons, Mary</a>	Assigned	Assigned ▼	Delete
<input type="checkbox"/>	 <a href="#">Tillman, Jennifer</a>	Assigned	Assigned ▼	Delete
<input type="checkbox"/>	 <a href="#">Traylor, Anne</a>	Assigned	Assigned ▼	Delete
<input type="checkbox"/>	 <a href="#">Wells, Mary</a>	Assigned	Assigned ▼	Delete
<input type="checkbox"/>	 <a href="#">Williams, Estell</a>	Assigned	Assigned ▼	Delete
<input type="checkbox"/>	 <a href="#">Zimmerman, Elena</a>	Assigned	Assigned ▼	Delete

10 Volunteers listed

**Include:**

All volunteers  
 These volunteers

---

**Status**

Active       Applicant       Inactive  
 LOA       Prospect

---

**Role**

Assigned       Former       Inactive  
 Preference       Substitute       Trainee

---

[Help](#)

### Tag volunteers according to their role


If you track the roles volunteers have in your assignments, there may be times when you'd like to tag all of the volunteers with certain roles in certain assignments. To do this simply view the list of volunteers who have the role(s) you want using the steps listed above, and then click the **Tag these** button at the bottom of the Volunteers tab.

### Send messages to volunteers according to their role



If you track the roles volunteers have in your assignments, there may be times when you'd like to send an **email** [pg:0404], **Vic mail** [pg:0315], or **text message** [pg:0343] to all of the volunteers with certain roles in certain assignments. To do this, simply view the list of volunteers who have the role(s) you want using the steps listed above, and then click the **Messages** link at the top of the Volunteers tab.

Assignment Coordinators Profile Description **Volunteers** Schedule Rules

Save Cancel

 Messages

**Volunteers**

Tag	Volunteer	Role	New role
<input type="checkbox"/>	 <a href="#">Burger, James</a>	Assigned	Assigned ▼ <a href="#">Delete</a>
<input type="checkbox"/>	 <a href="#">Hawkins, Sandra</a>	Assigned	Assigned ▼ <a href="#">Delete</a>

### Customizing the Roles you track

By default Volgistics has several common volunteer roles already setup, such as 'Assigned' and 'Former.' If you have rights to the Setup area you can customize the roles you track by removing any of the default roles or adding your own roles. To customize the roles you track:

1. Choose setup from the [menu \[pg:0215\]](#).
2. Click "Field options."
3. Click "Service tab."
4. Click "Role." This opens the Field Properties window for the Role field.
5. Use the "Add a new item" field to add new roles. You can remove an existing role using the **Merge** button to merge the role you want to remove into one that you want to keep.

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## Add an Assignment

Help topic 2215

Added or revised 10-03-2016

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To add a new *assignment* record:

1. Choose Assignments from the [menu \[pg:0215\]](#).
2. Click the 'Add a new assignment' link.

# Assignments

Include inactive assignments

[Sample Agency Name](#)

[Add a new Place](#)

[Volunteer Services](#)

[Add a new assignment](#)

If you have more than one *place* [pg:0096], click the 'Add a new assignment' link under the *place* where the new assignment will be located. If you want to create a new *site* and/or *place* for the assignment, [add the site and/or place](#) [pg:0110] [place](#) [pg:0110] record first.

3. Enter an assignment name on the Assignment tab.

Assignment
Coordinators
Profile
Description
Volunteers
Schedule

**Name**

Site: **Sample Agency Name**

Place: **Volunteer Services**

Assignment:

Impact:

Status: Active  Advertise  Sign-in option  Schedule reminders

**Address**

Street 1:  Office:

Street 2:  Cell:

Street 3:  Fax:

City:

State:  Zip:

**Detail**

Minimum age:

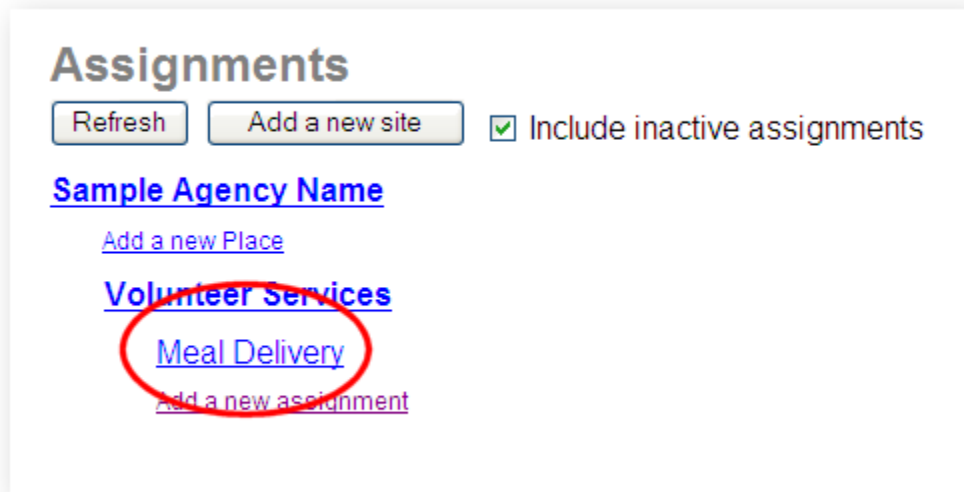
Spare dropdown 1:  Spare field 1:

Spare checkbox 1

You can also enter any additional information you would like on the Assignment tab at this time; or you can return to this assignment record later to add additional information.

4. Click the **Save** button.

Your new assignment now appears on your assignment list. To add or edit information for this assignment, simply click the assignment name.



#### Related help

[Help Topic 2099 \[pg:0096\]](#) - Tracking Assignments

[Help Topic 2216 \[pg:0108\]](#) - Add a Place

[Help Topic 2217 \[pg:0110\]](#) - Add a Site

[Help Topic 2266 \[pg:0135\]](#) - How do I change the name of an Assignment?

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## Add a Place

Help topic 2216

Added or revised 03-10-2011

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You can optionally [organize your volunteer assignments according to sites and places \[pg:0096\]](#).

To add a new *place* record:

1. Choose Assignments from the [menu \[pg:0215\]](#).
2. Click the 'Add a new place' link.

# Assignments

Include inactive assignments

[Sample Agency Name](#)  
[Add a new Place](#)  
[Volunteer Services](#)  
[Add a new assignment](#)

If you have more than one *site* [pg:0096], click the 'Add a new place' link that appears under the *site* where the new *place* will be located.

3. Enter the *place* name on the Place tab.

**Place**
Coordinators
Mission
Volunteers
Schedule
Service

**Name**

Site: \_\_\_\_\_

Place:

Type:

**Address**

Street 1: <input type="text"/>	Home: <input type="text"/> <input type="checkbox"/> Ok to call
Street 2: <input type="text"/>	Work: <input type="text"/> <input type="checkbox"/> Ok to call
Street 3: <input type="text"/>	Cell: <input type="text"/> <input type="checkbox"/> Ok to call
City: <input type="text"/>	Fax: <input type="text"/> <input type="checkbox"/> Ok to call
State: <input type="button" value="v"/> Zip: <input type="text"/>	Pager: <input type="text"/> <input type="checkbox"/> Ok to call
	Other: <input type="checkbox"/> Ok to call
	Email: <input type="text"/>
	Web site: <input type="text"/>

**Detail**

Spare dropdown 1:  Spare field 1:

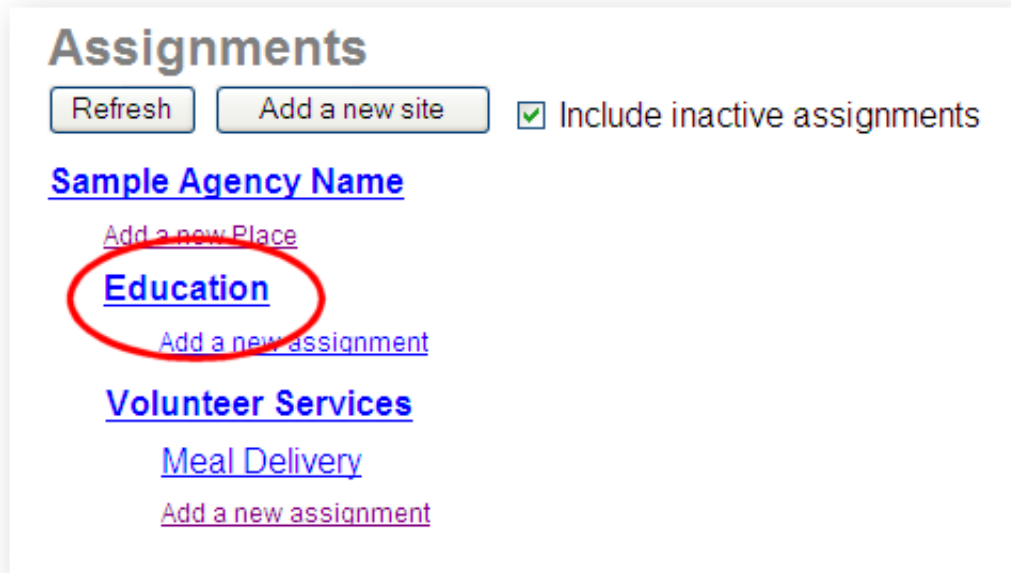
Spare checkbox 1

You can also enter any additional information you would like on the Place tab at this time; or you can return to this place record later to add additional information.

4. Click the **Save** button.

Your new *place* now appears on your assignment list. To add or edit information for this *place*, simply click the *place* name.

You're now ready to [add the assignments \[pg:0106\]](#) for this *place*.



#### Related help

[Help Topic 2099 \[pg:0096\]](#) - Tracking Assignments

[Help Topic 2215 \[pg:0106\]](#) - Add an Assignment

[Help Topic 2217 \[pg:0110\]](#) - Add a Site

[Help Topic 2267 \[pg:0136\]](#) - How do I change the name of a Place?

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## Add a Site

Help topic 2217

Added or revised 03-10-2011

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You can optionally [organize your volunteer assignments according to sites and places \[pg:0096\]](#).

To add a new *site* record:

1. Choose Assignments from the [menu \[pg:0215\]](#).

2. Click the **Add a new site** button.

# Assignments

Include inactive assignments

[Sample Agency Name](#)

[Add a new Place](#)

[Volunteer Services](#)

[Add a new assignment](#)

3. Enter the *site* name on the Site tab.

**Site** | Coordinators | Mission | Volunteers | Schedule | Service

**Name**

Site:

Type:

**Address**

Street 1: <input type="text"/>	Home: <input type="text"/> <input type="checkbox"/> Ok to call
Street 2: <input type="text"/>	Work: <input type="text"/> <input type="checkbox"/> Ok to call
Street 3: <input type="text"/>	Cell: <input type="text"/> <input type="checkbox"/> Ok to call
City: <input type="text"/>	Fax: <input type="text"/> <input type="checkbox"/> Ok to call
State: <input type="button" value="v"/> Zip: <input type="text"/>	Pager: <input type="text"/> <input type="checkbox"/> Ok to call
	Other: <input type="checkbox"/> Ok to call
	Email: <input type="text"/>
	Web site: <input type="text"/>

**Detail**

Spare dropdown 1:  Spare field 1:

Spare checkbox 1

You can also enter any additional information you would like on the Site tab at this time; or you can return to this *site* record later to add additional information.

4. Click the **Save** button.



Your new *site* now appears on your assignment list. To add or edit information for this *site*, simply click the *site* name.

Each time you add a new

*site*

to your database, Volgistics automatically creates a *place* record under the new *site* called 'Volunteer Services.' You can optionally [rename \[pg:0136\]](#) or [delete \[pg:0112\]](#) the 'Volunteer Services' place.



#### Related help

[Help Topic 2099 \[pg:0096\]](#) - Tracking Assignments

[Help Topic 2216 \[pg:0108\]](#) - Add a Place

[Help Topic 2215 \[pg:0106\]](#) - Add an Assignment

[Help Topic 2268 \[pg:0137\]](#) - How do I change the name of a Site?

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## Reorganizing Sites, Places or Assignments

Help topic 2218

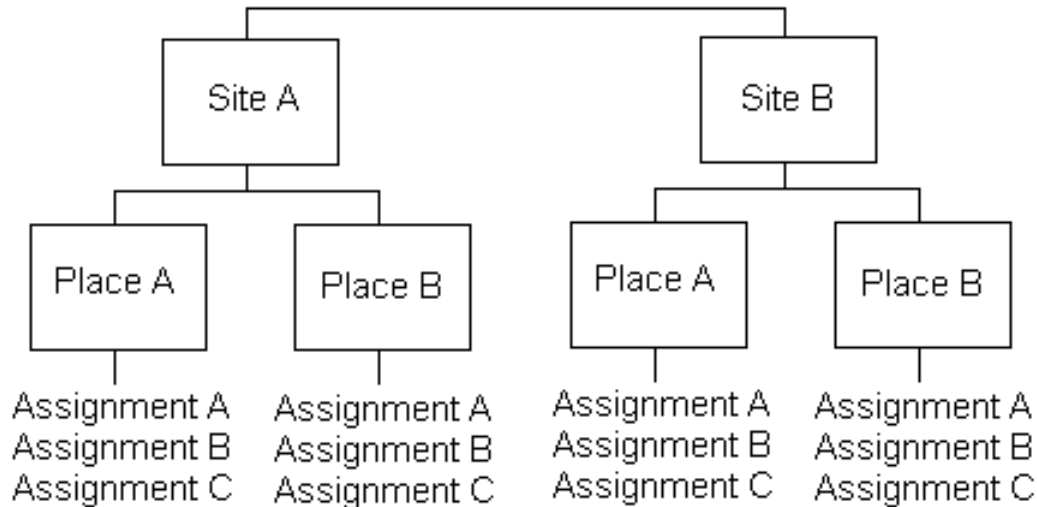
Added or revised 05-17-2016

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Volgistics provides features for tracking volunteer Assignments. Assignments is the term Volgistics uses to describe the tasks volunteers perform at your organization. Depending on your organization's purpose, Assignments may also be thought of as jobs, tasks, opportunities, projects, work areas, positions, events, or something else.

You may want to organize your Assignments under Sites and Places. As with Assignments, Sites and Places are just terms Volgistics uses. The Sites and Places can represent many different things depending on your organization. For example, they might be campuses, locations, departments, floors, programs, events, and more.

The chart below shows the basic Site, Place, and Assignment structure:



You can learn more about the Site, Place, and Assignment structure in [help topic 2099 \[pg:0096\]](#).

There may be times when you need to re-arrange the way Sites, Places, and Assignments have been organized in your account. Volgistics includes tools you can use to

- Combine two or more Assignments into one
- Move Assignments from one Place to another
- Delete Assignments
- Combine two or more Places into one
- Move a Place from one Site to another
- Delete Places
- Combine two or more Sites into one
- Delete Sites

This help topic explains how to perform these tasks, and what happens when you do. You can click a link in the *Contents* box below to go directly to a section of the help topic.

## **Contents**

### Restrictions

#### Assignments

Combine Two or More Assignments into One  
Move Assignments from One Place to Another  
Delete Assignments

#### Places

Combine Two or More Places into One  
Move Places from One Site to Another  
Delete Places

## Sites

Combine Two or More Sites into One

Delete Sites

## VicDocs

VicDocs and Combining Sites, Places, or Assignments

VicDocs and Deleting Sites, Places, or Assignments

## **Restrictions**

The Site, Place, and Assignment records form the framework, or structure, you use to track volunteer scheduling and service. The system uses different kinds of records for different purposes. Because of this, you cannot automatically:

- Change an Assignment record into a Site or Place record
- Change a Place record into an Assignment or Site record
- Change a Site record into a Place or Assignment record
- Give volunteers a [Role \[pg:0103\]](#) (such as *Assigned*) at a Site or Place. Volunteers can only have Roles in Assignments.

These restrictions ensure that your database always has the logical organization required for features such as reporting and scheduling to function properly.

## **Assignments**

This section covers how to combine, move, or delete Assignment records in your account.

### **Combine Two or More Assignments into One**

If you find you have two or more Assignment records for the same Assignment, or you are merging what are currently separate volunteer Assignments into one, you can easily combine Assignment records.

#### What happens when you combine Assignments

When you combine two Assignments into one, Volgistics merges them together in the database. Specifically:

- If the Assignments had different names, the name of the Assignment that you combined the first Assignment into will be the name of the combined Assignment. For example, if you combine an Assignment titled *Front Desk* with an Assignment titled *Information Desk*, the combined Assignment will be titled *Information Desk*
- Volunteers who have a [Role \[pg:0103\]](#) such as *Assigned* in the first Assignment will have the same Role in the new combined Assignment. No volunteer Roles are deleted.
- When volunteers have [service entries \[pg:1581\]](#) associated with the first Assignment, these will now be associated with the new combined Assignment. No service records are deleted.
- The [schedules \[pg:0746\]](#) for the two Assignment records are combined into one schedule for the new combined Assignment.

[Coordinators \[pg:1922\]](#) for the first Assignment become Coordinators for the new combined Assignment.

[Reports \[pg:0595\]](#) that list volunteer service by Assignment will no longer list the first Assignment. Instead, all of the service for the first Assignment will appear under the new combined Assignment.

- Any documents uploaded for the first Assignment will be moved to the [Docs tab \[pg:1642\]](#) of the new combined Assignment as long as the combined Assignment is not be over the 50 document limit. If the combined Assignment will be over the 50 document limit, you will be able to select which documents to keep.

### How to combine Assignments

To combine two Assignments into one:

1. Choose Assignments from the [menu \[pg:0215\]](#).
2. Select the Assignment you want to combine into another. For example, if you want to merge *Front Desk* into *Information Desk*, select *Front Desk*.
3. Click the **Combine, move, or delete** button.
4. In the *Combine* box, use the dropdown list to select the other Assignment. In the example from step 2, if you're in the record for *Front Desk*, you will select *Information Desk* from the dropdown list. You can combine any Assignment with any other Assignment in your account, no matter what Site or Place it's under.
5. Click the **Start** button.
6. If the two Assignments will have over 50 documents when they are combined, a *Combine Documents* page will appear. See the VicDocs and Combining Sites, Places, or Assignments section below for information on deciding which documents to keep.

### **Move Assignments from One Place to Another**

If you organize your Assignments under Places, you can move (relocate) an Assignment from one Place to another. For example, if you have an Assignment called *Tutor* at a Place called *Educational programs*, you can move the Assignment to a different Place called *Outreach programs*.

### What happens when you move an Assignment

When you move an Assignment from one Place to another, all of the records associated with the Assignment move along with it. Volunteer [Role \[pg:0103\]](#) and [service entry \[pg:1581\]](#) information, plus [Coordinator records \[pg:1922\]](#) associated with the Assignment, will not change other than appearing under the new Place.

Service [reports \[pg:0595\]](#) that list service according to Place will now list service associated with the Assignment that was moved under the new Place rather than the old Place.

### How to move an Assignment

To move an Assignment from one Place to another:

1. Choose Assignments from the [menu \[pg:0215\]](#).
2. Select the assignment you want to move.
3. Click the **Combine, move, or delete** button.
4. In the *Move* box, use the dropdown list to select the Place you want to move the Assignment to. You can move an Assignment to be under any other Place in your account, no matter what Site the Place is under.
5. Click the **Start** button.

## Delete Assignments

If you have Assignments you no longer need to track, you can delete them. Deleting Assignments cannot be undone so

*be sure you understand what happens when you delete an Assignment before proceeding*

. In some cases it may be better to [mark the Assignment inactive \[pg:0140\]](#), or merge it into another Assignment, rather than delete it.

### What happens when you delete an Assignment

When you delete an Assignment in your account, Volgistics erases the entire Assignment record and all references to the Assignment. Specifically:

- No volunteers will show the deleted Assignment on their [Service tab \[pg:0138\]](#).
- Any [service records \[pg:1581\]](#) associated with the Assignment will have a blank Assignment field after the Assignment is deleted.
- Service reports such as the [All service by assignment-fiscal year \(stock\) \[pg:0620\]](#) report that list service according to Assignment will report service records that were associated with the Assignment under (*None*).
- Any [Coordinator \[pg:1922\]](#) records associated with the Assignment will remain in your account. However, they will no longer be associated with the deleted Assignment.
- The [schedule \[pg:0746\]](#) for the Assignment will be deleted. No volunteers will appear scheduled for the deleted Assignment.
- Documents uploaded to the [Docs tab \[pg:1642\]](#) of the Assignment will be deleted. You will have the option to download these locally during the deletion process

### How to delete an Assignment

To delete an Assignment:

1. Choose Assignments from the [menu \[pg:0215\]](#).
2. Select the Assignment you want to delete.
3. Click the **Combine, move, or delete** button.
4. Locate the *Delete* box and be sure to review the information regarding how deleting the Assignment will impact your account.
5. If the Assignment has documents uploaded to the [Docs tab \[pg:1642\]](#), there will be an option to have these documents downloaded or deleted. See the VicDocs and Deleting Sites, Places, or Assignments section below for information on downloading and retrieving documents.
6. If you are sure that you want to proceed, select the *Yes* option under *Are you certain you want to delete . . .* and then click the **Continue** button.

## Places

This section covers how to combine, move, or delete Place records in your account.

## Combine Two or More Places into One

You can combine two or more Place records into one. The Place records you combine may be under the same Site, or under different Sites.

### What happens when you combine Places

When you combine Place records, the two Places are merged in your account. The Places can be under the same Site, or different Sites.

- If the Places had different names, the name of the Place you combined the first Place into will be the name of the combined Place. For example, if you combine a Place titled *Volunteer Training* with a Place titled *Continuing Education*, the combined Place will be titled *Continuing Education*
- When you combine two Places into one, any Assignments under the first Place are moved to the new combined Place. If the same Assignment name exists under both Places, the duplicate Assignment name will have a number added to it. For example, if both Places had Assignments titled *Wheelchair Skills*, the Assignment from the first Place would become *Wheelchair Skills 1* in the combined Place.
- Volunteer Roles [pg:0103], service entries [pg:1581], and schedules [pg:0746] for Assignments that are moved will continue to be associated with that Assignment.

Coordinator [pg:1922] records associated with an Assignment that is moved will continue to be associated with that Assignment.

- Any documents uploaded for the first Place will be moved to the Docs tab [pg:1642] of the new combined Place as long as the combined Place is not be over the 50 document limit. If the combined Place will be over the 50 document limit, you will be able to select which documents to keep.

### How to combine Places

To combine two Places into one:

1. Choose Assignments from the menu [pg:0215].
2. Select a Place you want to combine into another. For example, if you want to merge the Place called *Volunteer Training* into the Place called *Continuing Education*, select *Volunteer Training*.
3. Click the **Combine, move, or delete** button.
4. In the *Combine* box, use the dropdown list to select the other Place. In the example from step 2, if you're in the record for *Volunteer Training*, you will select *Continuing Education* from the dropdown list. You can combine any Place with any other Place in your account, no matter what Site it's under.
5. Click the **Start** button.
6. If the two Places will have over 50 documents when they are combined, a *Combine Documents* page will appear. See the VicDocs and Combining Sites, Places, or Assignments section below for information on deciding which documents to keep.

## Move Places from One Site to Another

If you organize your Places by Site, you can move a Place from one Site to another.

#### What happens when you move a Place

When you move a Place from one Site to another, all of the records associated with the Place move along with it.

- Volunteers who have **Roles** [pg:0103] in Assignments under the Place will continue to have the same Roles in the same Assignments.

**Service entries** [pg:1581] associated with Assignments under the Place will continue to be associated with the same Assignments. The difference is that **reports** [pg:0595] organized by Site, Place, and Assignment will now show the service under the new Site instead of the old.

- The **schedule** [pg:0746] for the Place will now appear under the Schedule for the new Site.

#### How to move a Place

To move a Place from one Site to another:

1. Choose Assignments from the **menu** [pg:0215].
2. Select the Place you want to move.
3. Click the **Combine, move, or delete** button.
4. In the *Move* box, use the dropdown list to select the Site you want to move the Place to. You can move a Place to be under any other Site in your account.
5. Click the **Start** button.

#### **Delete Places**

You can delete Places from your account as long as the Place is not the only Place under a Site. Each Site must have at least one Place record under it. Also, there cannot be any Assignments listed under the Place. You must move or delete all Assignments under the Place before you can delete the Place.

#### What happens when you delete a Place

- When you delete a Place, Volgistics removes all references to the Place, and deletes the Place record itself.
- Any **Coordinator** [pg:1922] records associated with the Place you delete will remain in your database. However, they will no longer be associated with the deleted Place.
- Documents uploaded to the **Docs tab** [pg:1642] of the Place will be deleted. You will have the option to download these locally during the deletion process

#### How to delete a Place

To delete a Place:

1. Choose Assignments from the **menu** [pg:0215].
2. Select the Place you want to delete.

3. Click the **Combine, move, or delete** button.

4. Locate the *Delete* box and be sure to review the information regarding how deleting the Place will impact your account. *If there are still Assignments under the Place, the Delete box will not appear. In this case you will need to move or delete the Assignments before proceeding.*

5. If the Place has documents uploaded to the [Docs tab \[pg:1642\]](#), there will be an option to have these documents downloaded or deleted. See the VicDocs and Deleting Sites, Places, or Assignments section below for information on downloading and retrieving documents.

6. If you are sure that you want to proceed with deleting the Place, select the *Yes* option under *Are you certain you want to delete . . .* and then click the **Continue** button.

## **Sites**

This section covers how to combine, move, or delete Site records in your account.

### **Combine Two or More Sites into One**

You can merge the information for Sites together by combining the Sites.

#### What happens when you combine Sites

When you combine two Sites, all information and related records from one Site are moved to another. Specifically:

- The name of the Site that you combined the first Site into will be the name of the combined Site. For example, if you combine a Site titled *North Campus* into a Site titled *West Campus*, the combined Site will be titled *West Campus*
- When you combine two Sites into one, all of the Places and Assignments under the first Site are moved to the new combined Site. If the same Place name exists under both Sites, the duplicate Place name will have a number added to it. For example, if both Sites had Places titled *Continuing Education*, the Place from the first Site would become *Continuing Education 1* in the combined Site.
- Volunteer [Roles \[pg:0103\]](#), [service entries \[pg:1581\]](#), and [schedules \[pg:0746\]](#) for Assignments under the Places that are moved will continue to be associated with that Assignment.

[Coordinator \[pg:1922\]](#) records associated with Assignments under the Places that are moved will continue to be associated with that Assignment.

- If your account uses [Site Level Access \[pg:0092\]](#), the [System Operators \[pg:0065\]](#) assigned to each Site ([Site-Level Operators \[pg:1442\]](#)) will still be limited to just the combined Site after the merge. However, after the merge they will see the Places, Assignments, and volunteers that were associated with other Site involved in the merge.
- If your account uses [Site Level Access \[pg:0092\]](#), your volunteers can be [associated with a Site \[pg:0094\]](#). After the merge, volunteers associated with the first Site will now be associated with the combined Site.
- Any documents uploaded for the first Site will be moved to the [Docs tab \[pg:1642\]](#) of the new combined Site as long as the combined Site is not be over the 50 document limit. If the combined Site will be over the 50 document limit, you will be able to select which documents to keep.

#### How to combine Sites



To combine two Sites into one:

1. Choose Assignments from the [menu \[pg:0215\]](#).
2. Select one of Sites you want to combine into another. For example, if you want to merge Site *North Campus* into Site *West Campus*, click the link to *North Campus*
3. Click the **Combine, move or delete** button.
4. In the *Combine* box, use the dropdown list to select the other Site. For example, if you want to combine *North Campus* into *West Campus*, and you're on the record for *North Campus*, select *West Campus* from the dropdown list.
5. Click the **Start** button.
6. If the two Sites will have over 50 documents when they are combined, a *Combine Documents* page will appear. See the VicDocs and Combining Sites, Places, or Assignments section below for information on deciding which documents to keep.

### Delete Sites

You can delete Sites from your account as long as the Site is not the only Site in the Site, Place, and Assignment structure. If your account only has one Site, you will not be able to delete the Site. Also, there cannot be any Assignments listed under the Site. You must move or delete all Assignments under the Site before you can delete the Site.

#### What happens when you delete a Site

- When you delete a Site, Volgistics removes all references to the Site, and deletes the Site record itself.
- Any [Coordinator \[pg:1922\]](#) records associated with the Site you delete will remain in your database. However, they will no longer be associated with the deleted Site.
- If you use [Site Level Access \[pg:0092\]](#), Volgistics [System Operators \[pg:0065\]](#) who [only have access \[pg:1442\]](#) to the Site you delete will be blocked from the system until an [Administrator \[pg:0052\]](#) un-checks the *Block this operator's access to the system* box on their [System Operator record \[pg:1895\]](#).
- If you use [Site Level Access \[pg:0092\]](#), volunteers who had the Site you delete [listed on the Core tab \[pg:0094\]](#) of their record will no longer show this Site.
- Documents uploaded to the [Docs tab \[pg:1642\]](#) of the Site will be deleted. You will have the option to download these locally during the deletion process

#### How to delete a Site

To delete a Site:

1. Choose Assignments from the [menu \[pg:0215\]](#).
2. Select the Site you want to delete.
3. Click the **Combine, move, or delete** button.

4. Locate the *Delete* box and be sure to review the information regarding how deleting the Site will impact your account. *If there are still Assignments under the Site, the Delete box will not appear. In this case you will need to move or delete the Assignments before proceeding.*

5. If the Site has documents uploaded to the **Docs tab** [pg:1642], there will be an option to have these documents downloaded or deleted. See the VicDocs and Deleting Sites, Places, or Assignments section below for information on downloading and saving documents.

6. If you are sure that you want to proceed with deleting the Site, select the *Yes* option under *Are you certain you want to delete . . .* and then click the **Continue** button.

### **VicDocs**

If your account uses the optional **VicDocs** [pg:1648] module, you may have additional considerations when combining or deleting Sites, Places, or Assignments. You can learn more about these in the sections below.

### **VicDocs and Combining Sites, Places, or Assignments**

Each Site, Place, or Assignment record can have a up to 50 documents uploaded to the **Docs tab** [pg:1642]. If combining two Sites, Places, or Assignments will cause the Docs tab of the combined record to be over the limit, you will see a *Combine documents* page after you click the **Start** button.

The documents for the Site, Place or Assignment that will remain after the merge will be in the *Keep these documents* column on the left. Drag and drop documents from one column to the other until you have the documents you wish to have for the combined record in the *Keep these documents* column. When you are finished, click the **Combine** button to finish combining the records.

**Combine Documents** Combine Cancel

The two assignments you are merging have a total number of documents that is more than the allowed document maximum (50). You need to select which documents you want to keep and which ones to be deleted.

The documents listed below are color coded for each assignment as follows: Front Lobby Desk West Lobby Desk

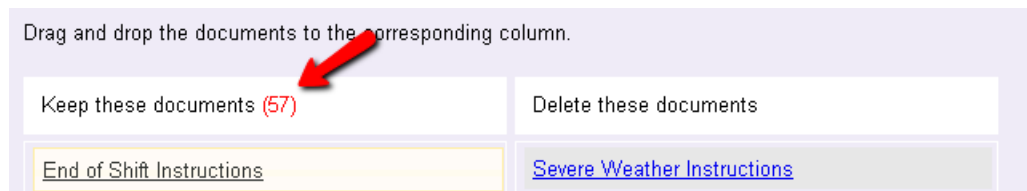
Drag and drop the documents to the corresponding column.

Keep these documents (46)	Delete these documents
<a href="#">End of Shift Instructions</a>	<a href="#">Emergency Contact Numbers</a>
<a href="#">Supervisor Contacts</a>	<a href="#">Severe Weather Instructions</a>
<a href="#">Community Resource Contacts</a>	<a href="#">Visitor Policies</a>

If you need to see the contents of a document, in many cases you can just click on the document's name. Your web browser will launch the program it needs to open the document. In some cases your web browser's settings are not configured to recognize the file type so the file will not open. In this case, you will need to change your web browser's settings so that it associates the correct program with the file extension if you want to open the document just by clicking on it.

If you wish to save any of the documents in the *Delete these documents* column before combining the records, open them as described above and then use the save feature in whatever program the file opens with. Or you can often right-click on the document's name and select the option to save the document from the menu.

If the number of documents in the *Keep these documents* column is more than 50, the **Combine** button will be disabled until the column's count is 50 or less. You can easily see when the column's total exceeds the limit because the document count in the column heading will turn red.



## VicDocs and Deleting Sites, Places, or Assignments

If the Site, Place, or Assignment you're deleting has documents on the [Docs tab \[pg:1642\]](#), you will see an option to make the documents available during the steps to delete the record.

This assignment with another, follow the instructions in the Combine box above.

Front Desk has documents on file:

- Download documents and delete Front Desk
- Delete Front Desk and documents

A message will be sent to your In Box when the documents are ready for download.

Are you certain you want to delete "Front Desk"?

If you do not need the documents, choose the option to delete the record and the documents. If you want to save the documents locally, select the option to download the documents. When you choose this option, the documents for the record will be placed in a zip file and sent to the [In Box \[pg:1917\]](#) tab of your Volgistics mailbox. You must save the zip file to your local computer within 5 days. After 5 days the zip file will be automatically deleted and the documents will be permanently removed from the system.

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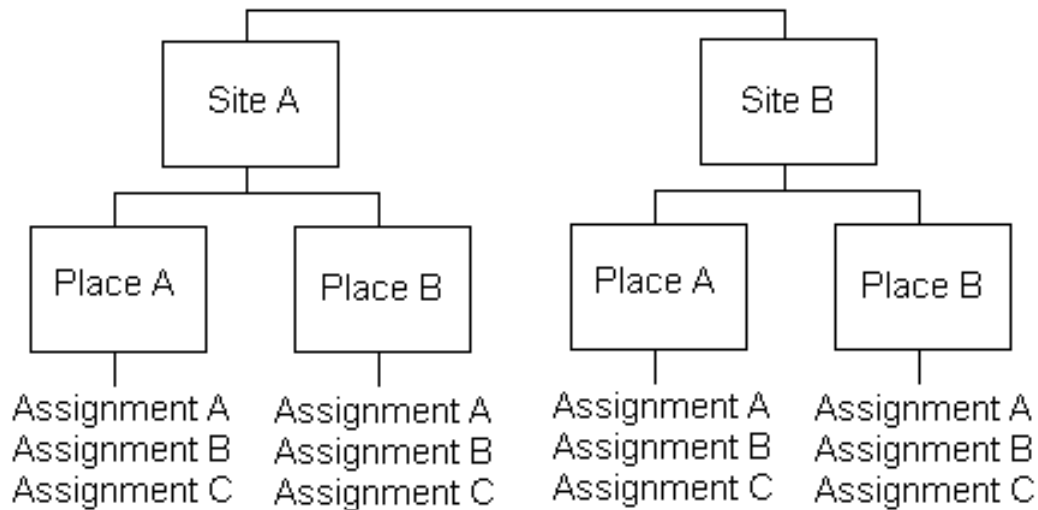
## View Volunteers for a Site

Help topic 2219

Added or revised 10-28-2015

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You can [organize the volunteer assignments \[pg:0096\]](#) you track in Volgistics to reflect the structure of your organization. Volgistics supports up to two levels of organization for this purpose: *Sites* and *Places*. This structure is shown in the following illustration:



With assignments organized this way, it's often useful to view or manage the list of volunteers who have *any* assignment at a selected *Site*. For example, you may want to see a list of the volunteers who have any of the six assignments under Site A (Places A and B) in the illustration above.

To do this:

1. Select *Assignments* from the [menu \[pg:0215\]](#).
2. Click the Site where you want to see the volunteer list.
3. Click the *Volunteers* tab for the selected Site.

The Volunteers tab looks similar to this:

**Volunteers**

*Press the Search button to start your search.*

**Include:**

---

**Status**

Active       Applicant       Inactive  
 LOA       Prospect

---

**Role**

Assigned       Former       Inactive  
 Preference       Substitute       Trainee

---

[Help](#)

### Search for the Records to Show

You set the criteria for the volunteer records you want to have shown on the tab. Once the criteria are selected, click the **Search** button. The tab will populate with all records that match the criteria selected. You can learn more about each option for searching below:

## Status

Under Status, click each of the volunteer [Statuses \[pg:1832\]](#) you want to appear on the list. Check *all* of the Statuses if you want to see all volunteers who have assignments in the selected Site regardless of their Status.

In the example pictured above, only volunteers who have the *Active* Status will appear on the list.

## Role

Under Role, click each of the assignment [Roles \[pg:0103\]](#) you want to appear on the list. Check *all* of the Roles if you want to see all volunteers who have assignments that fall under the Site regardless of their Role in the assignment. Please note that you must select a Role (or Roles) in order for the search to bring back results because the system is looking for volunteers in the assignments that are listed under the Site.

In the example pictured above, only volunteers who have the Roles *Assigned*, *Substitute* or *Trainee* in assignments that fall under the Site will appear on the list.

## **Status vs. Role**

Note that a volunteer's

*Status*

in your organization is different than their

*Role*

in an assignment.

A volunteer's [Status \[pg:1832\]](#) is their overall standing in your organization. Common Statuses include *Active* (the volunteer is regularly involved in your organization) and

*Inactive*







(the volunteer is no longer regularly involved in your organization). Volunteers can have just one Status. You enter or set a volunteer's status on the [Core tab \[pg:1868\]](#) of their record.

Roles, on the other hand, relate to a volunteer's standing in a specific *assignment*. Common [Roles \[pg:0103\]](#) include *Assigned* (the volunteer regularly serves in this assignment), *Former* (the volunteer no longer serves in this assignment--but did once), and *Substitute* (the volunteer can be called to substitute for someone else in this assignment). Volunteers can have one (or more) Roles in each of their assignments.

In the example pictured above, the volunteer list will include all of the volunteers whose volunteer Status is *Active*, and who have any of these three Roles in assignments that fall under the Site: *Assigned*, *Substitute*, or *Trainee*.

## Using the Volunteers Tab

After you select the criteria for the volunteers you want on the page, and click the **Search** button, your volunteer list will appear similarly to what is shown below:

Tag	Volunteer	Assignment	Role	New role	
<input type="checkbox"/>	 <a href="#">Barra, Cathy</a>	[Heart Center] Cardiovascular Waiting Room	Assigned	Assigned ▼	<a href="#">Delete</a>
<input type="checkbox"/>	 <a href="#">Beesley, Margaret</a>	[Heart Center] Cardiovascular Waiting Room	Assigned	Assigned ▼	<a href="#">Delete</a>
<input type="checkbox"/>	 <a href="#">Brown, Hazel</a>	[Heart Center] Information Desk	Assigned	Assigned ▼	<a href="#">Delete</a>
<input type="checkbox"/>	 <a href="#">Brown, Hazel</a>	[Heart Center] Information Desk	Substitute	Substitute ▼	<a href="#">Delete</a>
<input type="checkbox"/>	 <a href="#">Campbell, Diane</a>	[Heart Center] Information Desk	Assigned	Assigned ▼	<a href="#">Delete</a>
<input type="checkbox"/>	 <a href="#">Green, Nicole</a>	[Heart Center] Information Desk	Assigned	Assigned ▼	<a href="#">Delete</a>
<input type="checkbox"/>	 <a href="#">Jackson, Jennifer</a>	[Heart Center] Information Desk	Substitute	Substitute ▼	<a href="#">Delete</a>
<input type="checkbox"/>	 <a href="#">Lewis, Alysia</a>	[Heart Center] Information Desk	Assigned	Assigned ▼	<a href="#">Delete</a>
<input type="checkbox"/>	 <a href="#">Mitchell, Loan</a>	[Heart Center] Information Desk	Substitute	Substitute ▼	<a href="#">Delete</a>
<input type="checkbox"/>	 <a href="#">Plemons, Mary</a>	[Heart Center] Cardiovascular Waiting Room	Assigned	Assigned ▼	<a href="#">Delete</a>
<input type="checkbox"/>	 <a href="#">Scott, Mary</a>	[Heart Center] Information Desk	Assigned	Assigned ▼	<a href="#">Delete</a>
<input type="checkbox"/>	 <a href="#">Stover, Heather</a>	[Heart Center] Information Desk	Substitute	Substitute ▼	<a href="#">Delete</a>
<input type="checkbox"/>	 <a href="#">Tillman, Jennifer</a>	[Heart Center] Information Desk	Assigned	Assigned ▼	<a href="#">Delete</a>

[Help](#)

At this point you can work with the records on the page. The following sub-sections have more information on this.

### Change a volunteer's role

You can change a volunteer's Role in the assignment. Any change you make here will automatically show on the [Service tab \[pg:0138\]](#) of the volunteer's record. To change a volunteer's role in the assignment, use the dropdown list in the *New role* column to select the new Role.

If you do not want volunteers to have a Role (or Roles) in the assignment any longer, you can click the

### *Delete*

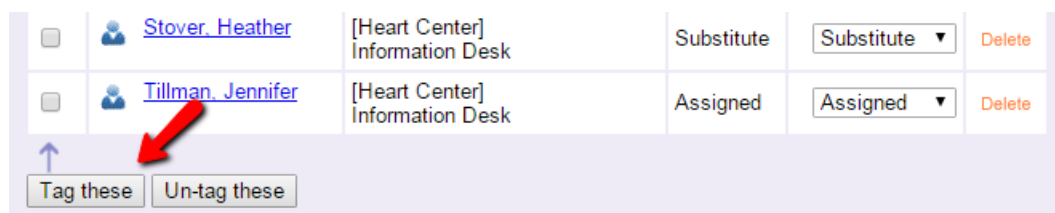
link in the row where the volunteer's Role is listed. The Role will be removed on the Volunteers tab where you are at, and also on the [Service tab \[pg:0138\]](#) of the volunteer's record.

### Tag the volunteers for a Site

There may be times when you'd like to [tag \[pg:1529\]](#) all of the volunteers who have an assignment listed under a Site. For example, you might want to print a report for all the volunteers who serve at the Site. You can do this by tagging the volunteers who have the assignment and then printing the report so it includes only the tagged volunteers. You can learn what tasks you can perform on a group of tagged records in [help topic 2137 \[pg:1999\]](#).

To tag all of the volunteers for a Site:

1. Open the Volunteers tab for the Site.
2. Search for the records you want to have shown on the page as described in the *Search for the Records to Show* section above.
3. Click the **Tag these** button near the bottom of the list.

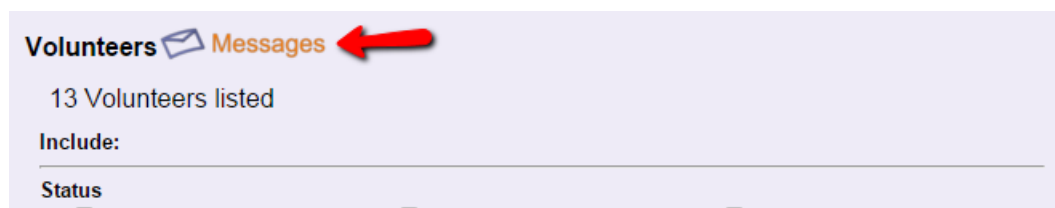


### Send a message to the volunteers for a Site

There may be times when you'd like to send an [email \[pg:0404\]](#), [Vic mail \[pg:0315\]](#), or [text message \[pg:0343\]](#) to all of the volunteers for a Site.

To send a message to the volunteers for a Site:

1. Open the Volunteers tab for the Site.
2. Search for the records you want to have shown on the page as described in the *Search for the Records to Show* section above.
3. Click the *Message* icon near the top of the list.



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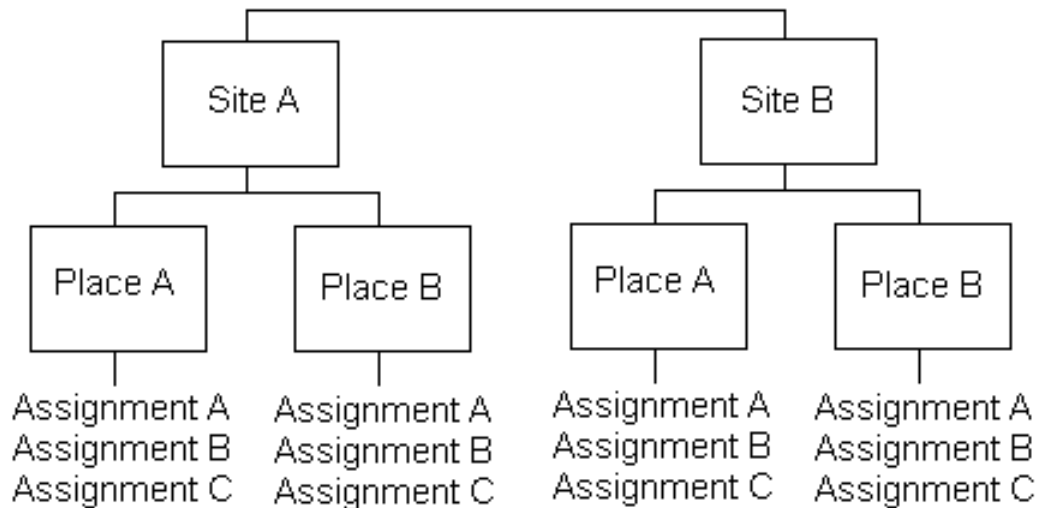
## View Volunteers for a Place

Help topic 2220

Added or revised 10-28-2015

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You can [organize the volunteer assignments \[pg:0096\]](#) you track in Volgistics to reflect the structure of your organization. Volgistics supports up to two levels of organization for this purpose: *Sites* and *Places*. This structure is shown in the following illustration:



With assignments organized this way, it's often useful to view or manage the list of volunteers who have *any* assignment at a selected *Place*. For example, you may want to see a list of the volunteers who have any of the three assignments under Site A, Place A, in the illustration above.

To do this:

1. Select *Assignments* from the [menu \[pg:0215\]](#).
2. Click the *Place* where you want to see the volunteer list.
3. Click the *Volunteers* tab for the selected *Place*.

The *Volunteers* tab looks similar to this:



**Volunteers**

*Press the Search button to start your search.*

**Include:**

---

**Status**

Active                       Applicant                       Inactive  
 LOA                               Prospect

---

**Role**

Assigned                       Former                       Inactive  
 Preference                       Substitute                       Trainee

---

[Help](#)

### Search for the Records to Show

You set the criteria for the volunteer records you want to have shown on the tab. Once the criteria are selected, click the **Search** button. The tab will populate with all records that match the criteria selected. You can learn more about each option for searching below:

#### Status

Under Status, click each of the volunteer [Statuses \[pg:1832\]](#) you want to appear on the list. Check *all* of the Statuses if you want to see all volunteers who have the selected assignment regardless of their Status.

In the example pictured above, only volunteers who have the *Active* Status will appear on the list.

#### Role

Under Role, click each of the assignment [Roles \[pg:0103\]](#) you want to appear on the list. Check *all* of the Roles if you want to see all volunteers who have assignments that fall under the Place regardless of their Role in the assignment. Please note that you must select a Role (or Roles) in order for the search to bring back results because the system is looking for volunteers in the assignments that are listed under the Place.

In the example pictured above, only volunteers who have the Roles *Assigned*, *Substitute* or *Trainee* in assignments that fall under the Place will appear on the list.

### Status vs. Role

Note that a volunteer's

*Status*

in your organization is different than their

*Role*

in an assignment.

A volunteer's [Status \[pg:1832\]](#) is their overall standing in your organization. Common Statuses include *Active*

(the volunteer is regularly involved in your organization) and

### *Inactive*

(the volunteer is no longer regularly involved in your organization). Volunteers can have just one Status. You enter or set a volunteer's status on the **Core tab** [pg:1868] of their record.

Roles, on the other hand, relate to a volunteer's standing in a specific *assignment*. Common **Roles** [pg:0103] include *Assigned* (the volunteer regularly serves in this assignment), *Former* (the volunteer no longer serves in this assignment--but did once), and *Substitute* (the volunteer can be called to substitute for someone else in this assignment). Volunteers can have one (or more) Roles in each of their assignments.

In the example pictured above, the volunteer list will include all of the volunteers whose volunteer Status is *Active*, and who have any of these three Roles in assignments that fall under the Place: *Assigned, Substitute, or Trainee*.

## Using the Volunteers Tab

After you select the criteria for the volunteers you want on the page, and click the **Search** button, your volunteer list will appear similarly to what is shown below:

Tag	Volunteer	Assignment	Role	New role
<input type="checkbox"/>	<a href="#">Dick, Gwendolyn</a>	Surgery Waiting Room	Substitute	Substitute ▼ Delete
<input type="checkbox"/>	<a href="#">Farr, Cody</a>	Surgery Waiting Room	Assigned	Assigned ▼ Delete
<input type="checkbox"/>	<a href="#">Hamilton, Nathan</a>	Surgery Waiting Room	Assigned	Assigned ▼ Delete
<input type="checkbox"/>	<a href="#">Lewis, Alysia</a>	Surgery Waiting Room	Trainee	Trainee ▼ Delete
<input type="checkbox"/>	<a href="#">Marlin, Shane</a>	Joint Replacement Center Aide	Assigned	Assigned ▼ Delete
<input type="checkbox"/>	<a href="#">Moore, Barbara</a>	Joint Replacement Center Aide	Assigned	Assigned ▼ Delete
<input type="checkbox"/>	<a href="#">Murry, Karen</a>	PACU Aide	Assigned	Assigned ▼ Delete
<input type="checkbox"/>	<a href="#">Parker, Louise</a>	PACU Aide	Assigned	Assigned ▼ Delete
<input type="checkbox"/>	<a href="#">Pine, Loretta</a>	PACU Aide	Assigned	Assigned ▼ Delete
<input type="checkbox"/>	<a href="#">Pine, Loretta</a>	Joint Replacement Center Aide	Trainee	Trainee ▼ Delete
<input type="checkbox"/>	<a href="#">Tillman, Jennifer</a>	Surgery Waiting Room	Assigned	Assigned ▼ Delete

↑  
Tag these   Un-tag these

At this point you can work with the records on the page. The following sub-sections have more information on this.

### Change a volunteer's role

You can change a volunteer's Role in the assignment. Any change you make here will automatically show on the **Service tab** [pg:0138] of the volunteer's record. To change a volunteer's role in the assignment, use the dropdown list in the *New role* column to select the new Role.

If you do not want volunteers to have a Role (or Roles) in the assignment any longer, you can click the

*Delete*

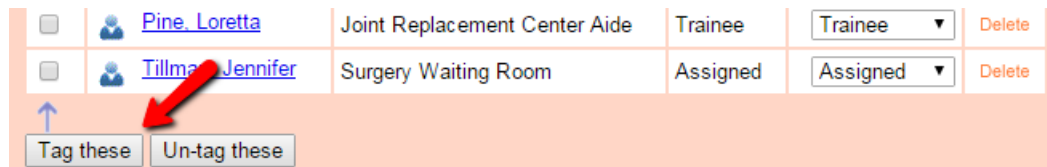
link in the row where the volunteer's Role is listed. The Role will be removed on the Volunteers tab where you are at, and also on the [Service tab \[pg:0138\]](#) of the volunteer's record.

### Tag the volunteers for a Place

There may be times when you'd like to [tag \[pg:1529\]](#) all of the volunteers who have an assignment listed under a Place. For example, you might want to print a report for all the volunteers who serve at the Place. You can do this by tagging the volunteers who have the assignment and then printing the report so it includes only the tagged volunteers. You can learn what tasks you can perform on a group of tagged records in [help topic 2137 \[pg:1999\]](#).

To tag all of the volunteers for a Place:

1. Open the Volunteers tab for the Place.
2. Search for the records you want to have shown on the page as described in the *Search for the Records to Show* section above.
3. Click the **Tag these** button near the bottom of the list.



<input type="checkbox"/>	<a href="#">Pine, Loretta</a>	Joint Replacement Center Aide	Trainee	Trainee ▾	Delete
<input type="checkbox"/>	<a href="#">Tillman, Jennifer</a>	Surgery Waiting Room	Assigned	Assigned ▾	Delete

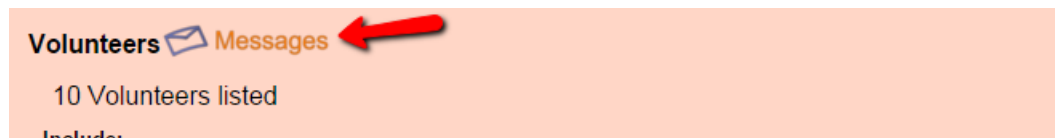
↑  
Tag these   Un-tag these

### Send a message to the volunteers for a Place

There may be times when you'd like to send an [email \[pg:0404\]](#), [Vic mail \[pg:0315\]](#), or [text message \[pg:0343\]](#) to all of the volunteers for a Place.

To send a message to the volunteers for a Place:

1. Open the Volunteers tab for the Place.
2. Search for the records you want to have shown on the page as described in the *Search for the Records to Show* section above.
3. Click the *Message* icon near the top of the list.



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## View Volunteers for an Assignment

Help topic 2221

Added or revised 10-03-2016

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It's often useful to view or manage the list of volunteers who have a specific assignment. To do this:

1. Select *Assignments* from the [menu \[pg:0215\]](#).
2. Click the Assignment where you want to see the volunteer list.
3. Click the *Volunteers* tab for the selected Assignment.

The Volunteers tab looks similar to this:

The screenshot shows a form titled "Volunteers" with a light green background. At the top, it says "Press the Search button to start your search." Below this, there are three sections of filters, each separated by a horizontal line. The first section is "Include:" with two radio buttons: "All volunteers" (unselected) and "These volunteers" (selected). The second section is "Status" with five checkboxes: "Active" (checked), "LOA" (unchecked), "Applicant" (unchecked), "Prospect" (unchecked), and "Inactive" (unchecked). The third section is "Role" with five checkboxes: "Assigned" (checked), "Preference" (unchecked), "Former" (unchecked), "Substitute" (checked), "Inactive" (unchecked), and "Trainee" (checked). At the bottom left of the form, there is a checkbox for "Matched volunteers" which is checked. At the bottom right, there are three buttons: "Help" (a blue link), "Search" (a grey button), and "Set all Assignments like this" (a grey button).

### Search for the Records to Show

You set the criteria for the volunteer records you want to have shown on the tab. Once the criteria are selected, click the **Search** button. The tab will populate with all records that match the criteria selected. You can learn more about each option for searching below:

#### Include

Use the Include options to choose which volunteers you want to see on the list.

- *All volunteers*
- Select *All volunteers* if you want the list to include all volunteers from your database that have the volunteer [Status\(es\) \[pg:1832\]](#) selected in the *Status* section. This is useful if you want to list all volunteers, and then assign some of them to this Assignment using the *New role* dropdown lists.

- *These volunteers*

- Select *These volunteers* if you want the list to include only the volunteers who have a [Role \[pg:0103\]](#) in this assignment, or those that are matched to the assignment. Unless you need to see all volunteers listed as described above, this is the option you generally will always have selected.

### Status

Under Status, check each of the volunteer [Statuses \[pg:1832\]](#) you want to appear on the list. Check *all* of the Statuses if you want to see all volunteers who have the selected assignment regardless of their Status.

In the example pictured above, only volunteers who have the *Active* Status will appear on the list.

### Role

Under Role, check each of the Assignment [Roles \[pg:0103\]](#) you want to appear on the list. Check *all* of the Roles if you want to see all volunteers who have the selected Assignment regardless of their Role in the assignment.

In the example pictured above, only volunteers who have the Roles *Assigned*, *Substitute* or *Trainee* in the selected assignment will appear on the list.

### Matched volunteers

If you use the [volunteer and Assignment matching \[pg:0899\]](#) features, you can check this box to list volunteers who are matched to this Assignment but do not currently have a Role. If you have disabled the matching features, this checkbox will not appear.

## **Status vs. Role**

Note that a volunteer's

### *Status*

in your organization is different than their

### *Role*

in a particular Assignment.

A volunteer's [Status \[pg:1832\]](#) is their overall standing in your organization. Common Statuses include *Active* (the volunteer is regularly involved in your organization) and

### *Inactive*

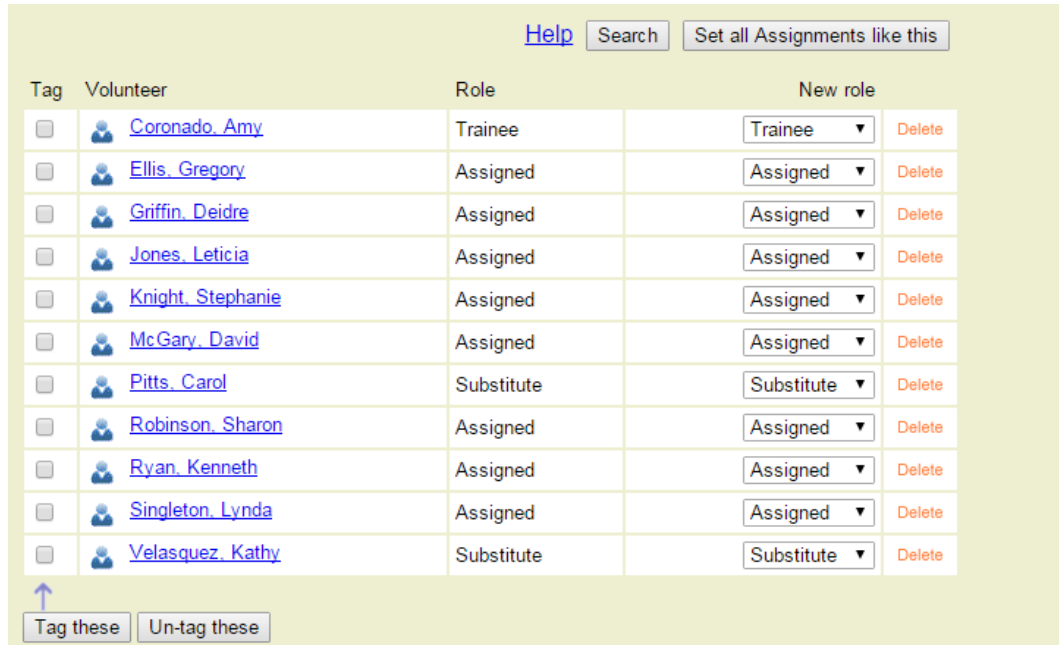
(the volunteer is no longer regularly involved in your organization). Volunteers can have just one Status. You enter or set a volunteer's Status on the [Core tab \[pg:1868\]](#) of their record.

Roles, on the other hand, relate to a volunteer's standing in a specific *Assignment*. Common [Roles \[pg:0103\]](#) include *Assigned* (the volunteer regularly serves in this Assignment), *Former* (the volunteer no longer serves in this Assignment--but did once), and *Substitute* (the volunteer can be called to substitute for someone else in this Assignment). Volunteers can have one or more Roles in each of their Assignments.

In the example pictured above, the volunteer list will include all of the volunteers whose volunteer Status is *Active*, and who have any of these three Roles in the selected assignment: *Assigned*, *Substitute*, or *Trainee*.

## Using the Volunteers Tab

After you select the criteria for the volunteers you want on the page, and click the **Search** button, your volunteer list will appear similarly to what is shown below:



The screenshot shows a table with the following columns: Tag, Volunteer, Role, New role, and Delete. The table contains 11 rows of volunteer data. At the top of the interface, there are buttons for 'Help', 'Search', and 'Set all Assignments like this'. At the bottom, there are buttons for 'Tag these' and 'Un-tag these'.

Tag	Volunteer	Role	New role	Delete
<input type="checkbox"/>	<a href="#">Coronado, Amy</a>	Trainee	Trainee ▼	Delete
<input type="checkbox"/>	<a href="#">Ellis, Gregory</a>	Assigned	Assigned ▼	Delete
<input type="checkbox"/>	<a href="#">Griffin, Deidre</a>	Assigned	Assigned ▼	Delete
<input type="checkbox"/>	<a href="#">Jones, Leticia</a>	Assigned	Assigned ▼	Delete
<input type="checkbox"/>	<a href="#">Knight, Stephanie</a>	Assigned	Assigned ▼	Delete
<input type="checkbox"/>	<a href="#">McGary, David</a>	Assigned	Assigned ▼	Delete
<input type="checkbox"/>	<a href="#">Pitts, Carol</a>	Substitute	Substitute ▼	Delete
<input type="checkbox"/>	<a href="#">Robinson, Sharon</a>	Assigned	Assigned ▼	Delete
<input type="checkbox"/>	<a href="#">Ryan, Kenneth</a>	Assigned	Assigned ▼	Delete
<input type="checkbox"/>	<a href="#">Singleton, Lynda</a>	Assigned	Assigned ▼	Delete
<input type="checkbox"/>	<a href="#">Velasquez, Kathy</a>	Substitute	Substitute ▼	Delete

At this point you can work with the records on the page. The following sub-sections have more information on this.

### Give or change a volunteer's Role

You can give a volunteer a Role in the Assignment, or change a volunteer's Role in the Assignment. Any change you make here will automatically show on the **Service tab** [pg:0138] of the volunteer's record. To give, or change, a volunteer's Role in the Assignment, use the dropdown list in the *New role* column to select the new Role.

If you do not want volunteers to have a Role (or Roles) in the Assignment any longer, you can click the

*Delete*

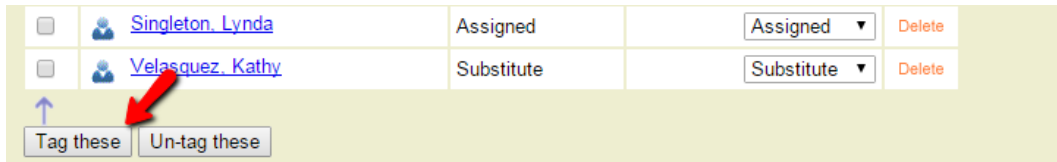
link in the row where the volunteer's Role is listed. The Role will be removed on the Volunteers tab where you are at, and also on the **Service tab** [pg:0138] of the volunteer's record.

### Tag the volunteers for an Assignment

There may be times when you'd like to **tag** [pg:1529] all of the volunteers who have a certain Assignment. For example, you might want to print a report for all the volunteers who have the Assignment. You can do this by tagging the volunteers who have the Assignment and then printing the report so it includes only the tagged volunteers. You can learn what other tasks you can perform on a group of tagged records in **help topic 2137** [pg:1999].

To tag all of the volunteers who have the Assignment:

1. Open the Volunteers tab for the Assignment.
2. Search for the records you want to have shown on the page as described in the *Search for the Records to Show* section above.
3. Click the **Tag these** button near the bottom of the list.

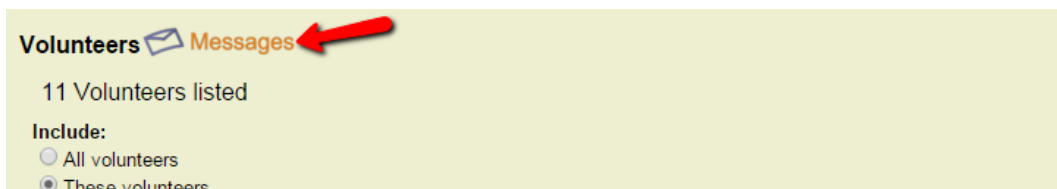


### Send a message to the volunteers for an Assignment

There may be times when you'd like to send an [email \[pg:0404\]](#), [Vic mail \[pg:0315\]](#), or [text message \[pg:0343\]](#) to all of the volunteers who have a certain Assignment.

To send a message to the volunteers who have a selected Assignment:

1. Open the Volunteers tab for the Assignment.
2. Search for the records you want to have shown on the page as described in the *Search for the Records to Show* section above.
3. Click the *Message* icon near the top of the list.



### **Related help**

- [Help Topic 1185 \[pg:0193\]](#) - Assigning Volunteers to an Assignment
- [Help Topic 2099 \[pg:0096\]](#) - Tracking Assignments
- [Help Topic 2173 \[pg:0103\]](#) - Roles
- [Help Topic 2219 \[pg:0122\]](#) - View Volunteers for a Site
- [Help Topic 2220 \[pg:0127\]](#) - View Volunteers for a Place
- [Help Topic 2399 \[pg:0138\]](#) - Tracking Volunteer Assignments on the Service Tab

---

## How do I change the name of an Assignment?

Help topic 2266

Added or revised 04-12-2011

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To change the name of an assignment record in your database:

1. Choose Assignments from the [menu \[pg:0215\]](#).
2. Click on the name of the assignment you want to change.
3. On the Assignments tab, enter the new name for the assignment in the Assignment field (type over the old assignment name with the new assignment name).

The screenshot shows a web form for editing an assignment. At the top, there are tabs: 'Assignment' (selected), 'Coordinators', 'Profile', 'Description', 'Volunteers', and 'Schedule'. Below the tabs are 'Save' and 'Cancel' buttons. The form is divided into three sections: 'Name', 'Address', and 'Detail'. In the 'Name' section, the 'Assignment' field contains 'Meal Delivery' and is circled in red. Other fields in this section include 'Site: Sample Agency Name', 'Place: Volunteer Services', 'Impact' (dropdown), 'Status: Active' (dropdown), and checkboxes for 'Advertise', 'Sign-in option', and 'Schedule reminders'. The 'Address' section has fields for 'Street 1', 'Street 2', 'Street 3', 'City', 'State' (dropdown), 'Zip', 'Office', 'Cell', and 'Fax'. The 'Detail' section has 'Minimum age: 0', 'Spare dropdown 1' (dropdown), 'Spare field 1' (text input), and 'Spare checkbox 1'. At the bottom, 'Save' and 'Cancel' buttons are circled in red.

4. Click the **Save** button.

The new assignment name will appear everywhere in your database that the old assignment name appeared before.

### Related help

[Help Topic 2215 \[pg:0106\]](#) - Add an Assignment



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## How do I change the name of a Place?

Help topic 2267

Added or revised 04-12-2011

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To change the name of a *place* record in your database:

1. Choose Assignments from the [menu \[pg:0215\]](#).
2. Click on the name of the *place* you want to change.
3. On the Place tab, enter the new name for the *place* in the Place field (type over the old *place* name with the new *place* name).

**Place** | Coordinators | Mission | Volunteers | Schedule | Service

Save | Cancel

**Name**

Site: \_\_\_\_\_

Place: Education \_\_\_\_\_

Type:

**Address**

Street 1: \_\_\_\_\_ Home: \_\_\_\_\_  Ok to call

Street 2: \_\_\_\_\_ Work: \_\_\_\_\_  Ok to call

Street 3: \_\_\_\_\_ Cell: \_\_\_\_\_  Ok to call

City: \_\_\_\_\_ Fax: \_\_\_\_\_  Ok to call

State:  Zip: \_\_\_\_\_ Pager: \_\_\_\_\_  Ok to call

Other:  Ok to call

Email: \_\_\_\_\_

Web site: \_\_\_\_\_

**Detail**

Spare dropdown 1:  Spare field 1: \_\_\_\_\_

Spare checkbox 1

Save | Cancel

4. Click the **Save** button.

The new *place* name will appear everywhere in your database that the old *place* name appeared before.

### Related help

[Help Topic 2216 \[pg:0108\]](#) - Add a Place

---

## How do I change the name of a Site?

Help topic 2268

Added or revised 04-12-2011

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To change the name of a *site* record in your database:

1. Choose Assignments from the [menu \[pg:0215\]](#).
2. Click on the name of the *site* you want to change.
3. On the Site tab, enter the new name for the *site* in the Site field. (type over the old *site* name with the new *site* name).

The screenshot shows a web form for editing a site record. At the top, there are tabs for 'Site', 'Coordinators', 'Mission', 'Volunteers', 'Schedule', and 'Service'. Below the tabs are 'Save' and 'Cancel' buttons. The 'Name' section contains a 'Site' text field with 'Monroe County' entered, which is circled in red. Below it is a 'Type' dropdown menu. The 'Address' section is divided into two columns. The left column has 'Street 1', 'Street 2', 'Street 3', 'City', 'State' (a dropdown), and 'Zip' fields. The right column has 'Home', 'Work', 'Cell', 'Fax', 'Pager', 'Other', 'Email', and 'Web site' fields, each with a corresponding 'Ok to call' checkbox. The 'Detail' section has a 'Spare dropdown 1' field, a 'Spare checkbox 1' checkbox, and a 'Spare field 1' text field. At the bottom left, the 'Save' button is circled in red.

4. Click the **Save** button.

The new *site* name will appear everywhere in your database that the old *site* name appeared before.

### Related help

[Help Topic \[pg:0110\]](#) - Add a Site

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## Tracking Volunteer Assignments on the Service Tab

Help topic 2399

Added or revised 10-04-2016

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Each volunteer's Assignments are tracked on the Service tab of the volunteer record. To get to a volunteer's Service tab, choose Volunteers from the [menu \[pg:0215\]](#), locate and click on the name of the volunteer of interest, and click on the Service tab in that volunteer's record. You will see that the Service tab contains three boxes: Assignments, Service and Mandatory Service. This help topic addresses only the first box, Assignments; help topic 2400 explains the [Service box \[pg:1581\]](#), and help topic 2156 explains how to [track mandatory service \[pg:1419\]](#) in Volgistics.

### Assignments

When you want to indicate that a volunteer should be associated with a specific Assignment you track in Volgistics, you can add an Assignment record to the Assignment box on the volunteer's Service tab. Often, the Assignment record you will add will state that a volunteer is "Assigned" to a particular Assignment, but Assignment records are also used to indicate that a volunteer has a [Role \[pg:0103\]](#) other than "Assigned" in an Assignment. For example, you would add an Assignment entry to the Assignments box on a volunteer's Service tab to point out that they are considered a "Substitute" or that this Assignment is their "Preference."

A volunteer's Role in an Assignment is important to track in many organizations because it allows [System Operators \[pg:0065\]](#) to see which volunteers have expressed interest in an Assignment, have offered to serve as substitutes for other volunteers in the Assignment, or are simply "Assigned" and therefore can be – and may have already been – scheduled to serve in it. Assignment entries can also help System Operators distinguish which volunteers should receive specific [email, text or Vic Mail messages \[pg:0399\]](#), and can show how a volunteer's relationship to various Assignments may have changed in an organization over time. Users can also create [Sets \[pg:0858\]](#) based on volunteer Assignments, including their Role, and Assignment "From" and "To" dates.

The image below shows the Assignments box on the Service tab of a volunteer who is assigned to two Assignments. The "From" column shows the date a volunteer was given the Role of "Assigned" in each Assignment, while the lack of dates in the "To" column indicates that the volunteer's "Assigned" Role in both Assignments is ongoing.

Assignment	Role	From	To		
Speaker's Bureau [Headquarters\Administration]	Assigned	02-28-2008		Edit	Delete
Trail Management [East East\Conservation]	Assigned	01-11-2008		Edit	Delete

### Adding a New Assignment Record

To give a volunteer a new Assignment record, take the following steps:

1. Choose Volunteers from the main menu.
2. Locate the volunteer's name, and click on it.
3. Go to the Service tab in the volunteer record.
4. Locate the Add box within the Assignments box on the Service tab.

**Add**

Assignment:

Role:

From:   To:

5. Use the available fields to enter the Assignment name, the Role the volunteer is being given in that Assignment, and the "From" and "To" dates for the entry.
6. Click the **Save** button to save the entry.

It is also possible for Assignment records to be automatically entered in a volunteer's Assignments box on their Service record. If you want an Assignment record to appear here automatically when a volunteer is scheduled to serve in an Assignment, or when a volunteer has service in an Assignment, configure the system to [record Assignments automatically \[pg:0906\]](#).

### Editing an Assignment Record

If a user wants to adjust an Assignment record, he or she should click the orange "Edit" link next to that Assignment record. For example, to add a "To" date to one of the Assignment records to indicate that a volunteer's Role as "Assigned" to that Assignment has ended, one would click "Edit" and then add a "To" date in the Edit box that appears under the list of Assignments, as seen below. After editing an Assignment record, be sure to click the **Save** button to save any changes.

**Assignments**

Assignment	Role	From	To		
Speaker's Bureau [Headquarters\Administration]	Assigned	02-28-2008		<a href="#">Edit</a>	<a href="#">Delete</a>
Trail Management [East East\Conservation]	Assigned	01-11-2008		<a href="#">Edit</a>	<a href="#">Delete</a>

**Edit**

Assignment:

Role:

From:   To:

While Assignment records allow you to track the specific jobs volunteers are associated with, they do not provide information about the work a volunteer has completed within those Assignments. For example, a volunteer with the Role of "Assigned" in an Assignment may or may not have service entries in that Assignment. To [track volunteer service in your organization's Assignments \[pg:1581\]](#), you will need to use the Service box on the Service tab in the volunteer record.

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## Can we delete an Assignment but maintain information associated with t

Help topic 2537

Added or revised 08-23-2011

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As organizations evolve and time passes, an Assignment that has been tracked in Volgistics may no longer be relevant. For example, an Assignment might have been set up for a special event that has passed, or a task may no longer be carried out by volunteers. When an Assignment is no longer current, system operators may want to remove the Assignment record from the system.

Before choosing to delete an Assignment record, please note:

**If an Assignment record is deleted from the system, all information associated with the Assignment will be deleted. This includes the Assignment details listed on the volunteer's Service tab. When an Assignment is deleted the Service tab will still show the hours the volunteer served on a particular date, but the Assignment information about the service hours will be removed.**

If you would like to preserve an Assignment in volunteer records but the Assignment is no longer part of your volunteer program, you should make the Assignment Inactive rather than delete it. Once an Assignment is Inactive, its schedule will be removed from your system. You can also choose whether or not to view the names of Inactive Assignments listed on the Assignments page from the main menu by optionally marking the "Include Inactive Assignments" checkbox on this page.

### To Make an Assignment Inactive

1. Choose Assignments from the main [menu \[pg:0215\]](#).
2. Click on the name of the Assignment you would like to make Inactive.
3. On the Assignment tab within the Assignment record, locate the Status field. Choose "Inactive" from the dropdown menu.
4. Click the **Save** button.
5. A warning that this change will remove the schedule for this Assignment, and that the schedule will not be able to be restored, will appear. Click the **OK** button to proceed.
6. A second warning confirming that the schedule for this Assignment will be removed if you make it Inactive will appear. Click the **OK** button to proceed.
7. Click the **Save** button to save the change.

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## How Volgistics Calculates Checklist Item Expiration Dates

Help topic 2009

Added or revised 05-10-2013

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When you [setup a checklist item \[pg:0916\]](#), you specify how often volunteers must complete it by choosing "One time," "Periodic," "Annual (same date for all volunteers)," "Annual (volunteer's birthday month)" or "Every time." For items that you make "Periodic," "Annual (same date for all volunteers)" or "Annual (volunteer's birthday month)," Volgistics automatically calculates the item's next expiration dates based on your setup choices.

### Periodic

The rules for calculating expiration dates for periodic items depend on whether the item is setup to expire x days *after it was last performed*, or *after it last expired*.

#### After it was last performed

When you setup a periodic item to expire x number of days after it was last performed, the item will expire x days after the date the item was most recently performed.

#### After it last expired

When you setup a periodic item to expire x number of days *after it last expired*, the expiration date is calculated by adding x days to the last date this item expired for the given volunteer, with these exceptions: If the volunteer has never completed the item before, or if the item expired more than x days ago. In these cases the expiration date is calculated as x days after it is performed.

Here are some examples. If you setup a checklist item called 'Health screening' to expire 365 days *after it last expired*, and a volunteer completes it for the very first time on January 10, 2002, it would expire 365 days later on January 10, 2003 (there is no earlier expiration date).

If that same volunteer completes a 'Health screening' again on January 20, 2003, it will expire next as expected on January 10, 2004 (365 days *after it last expired* on January 10, 2003). However, if the same volunteer does not complete another 'Health screening' until March 20, 2005 (for whatever reason), then this item would expire next on March 20, 2006 for this volunteer, and not January 10, 2004 (it would not make sense for a 'Health screening' performed on March 20, 2005 to expire on January 10, 2004 because January 2004 is earlier than March 2005).

### Annual: Either "same date for all volunteers" or "volunteer's birthday month"

The rules for calculating expiration dates for annual items - whether they are setup to expire on the same date for all volunteers or on a specific date in each individual volunteer's birthday month - depend on whether volunteers *may* or *may not* complete it early.

#### May complete early

When you setup an annual item so volunteers may complete it early, it will expire on the upcoming annual expiration date for a given volunteer if they have never completed the item before, or they have not completed it since it last expired.

If a volunteer has completed the item for the current year, and they complete it again before their next expiration date (i.e. you make a checklist entry manually on the History tab for this item, with a Date *before* the next annual expiration date), their expiration date is advanced by one year.

If a volunteer completes the item for a future year (i.e. you make a checklist entry manually on the History tab for this item, with a Date *after* the next annual expiration date), their expiration date is calculated as the next annual expiration date after the future completion date.

Here is an example: Suppose you setup a checklist item called "Dues" to expire annually on April 1st for all volunteers. If a new volunteer completes the item by paying their dues for the first time on November 1, 2002, the item will expire next on April 1, 2003 – the next annual expiration date for Dues.

If the same volunteer pays dues *again* before the April 1, 2003 expiration date, the volunteer's expiration date will be advanced one year to April 1, 2004 because they have paid in advance for the next year. Now suppose the same volunteer also pays an additional year's dues in advance (they want to be 'paid up' through April 1, 2005). If you make another Dues entry for this volunteer (on their History tab), with a Date later than April 1, 2004, the volunteer's next expiration date is advanced appropriately to April 1, 2005.

Likewise, consider how this would work if the "Dues" checklist item were setup to expire annually on the 1st of each volunteer's birthday month and volunteers are permitted to complete the item early: If a new volunteer with a January birthday pays their dues for the first time when they become a member in July 2002, the item will expire for them on January 1, 2003. If the volunteer completes the item again before the January 1, 2003 due date, their expiration date would be advanced to January 1, 2004 since they paid in advance for the next year.

#### May not complete early

When you setup an annual item so volunteers may *not* complete it early, it will always expire on the upcoming annual expiration date for a given volunteer no matter when, or how often they last completed the item.

For example, if you setup an annual (same date for all volunteers) checklist item called "Credential Check" that expires on July 1 every year, the item will expire for a volunteer even if they most recently completed it on June 30th. In addition, if you make manual entries on a volunteer's History tab for the "Credential Check" with dates later than the next July 1st, it will still expire next on the next July 1st.

Similarly, if the "Credential Check" item were setup as an annual (volunteer's birthday month) checklist item that must be completed the 15th of each volunteer's birthday month, it would become due for the volunteer on the 15th of their birthday month, even if they just completed the item on the 10th of their birthday month.

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## Checklist

Help topic 2238

Added or revised 05-24-2011

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The Volgistics Checklist features provide tools for keeping track of actions that new or current volunteers must complete. Examples of these actions include:

- Attending orientation
- Health screenings
- Confidentially agreements
- Parental consent forms
- Background checks
- Reference checks
- and more

You (or your organization's Volgistics administrator) start by setting up the individual checklist items you want to track. When you setup each Checklist item you can specify if it applies to all – or just certain – volunteers, and if it's something that must be repeated periodically (like health screenings). You can setup all of your checklist items before you get started with Volgistics, or you can create some at the beginning and add more as you go.

Every volunteer you track in Volgistics has a Checklist that shows you which items they've completed (with checkmarks) and which they need to complete (those without checkmarks). In the illustration below, volunteer Harry Bailey has completed all of his Checklist items except for his "Department orientation" and "Name Tag."

Each volunteer's Checklist appears on the History tab in their volunteer record. To view a volunteer's Checklist, select "Volunteers" from the [menu \[pg:0215\]](#), locate the volunteer's record, and then click on their History tab.

In addition to seeing which checklist items an individual volunteer has completed, you can also see their checklist completion history on the History tab. This list shows you the date(s) the volunteer completed each item, and when it next expires (for items that must be repeated periodically).

**Bailey, Harry**

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

Save Cancel  Tagged New Previous Next

**Checklist**

- Application approved
- Attends orientation
- Department orientation
- Drivers license check
- Health screening (due again on 03-02-2007 **Renewed**)
- Initial interview
- Name tag

Save Refresh

**Dates**

	Event	Date	Expires	Notation		
Checklist	Health screening	03-02-2006	03-02-2007	Complete	Edit	Delete
Award	500 hour award	06-01-2000		Presented	Edit	Delete
Award	100 Hour award	06-01-1998		Presented	Edit	Delete
Checklist	Application approved	12-28-1996		Complete	Edit	Delete
Status	Active	12-22-1996			Edit	
Checklist	Initial interview	12-13-1996		Complete	Edit	Delete
Checklist	Drivers license check	12-06-1996		Complete	Edit	Delete
Date	Date of first contact	11-13-1996		Advertisement	Edit	Delete
Class	Customer Service Training	08-02-1996		Completed	Edit	Delete
Checklist	Attends orientation	06-04-1990		Complete	Edit	Delete

**Add**

Add a:  date

Event:

Date:  Expires:

Notation:

Save Cancel

In addition to viewing individual volunteer's Checklists on their History tab, you can use the Tickler to see lists of all of the volunteers who currently need to complete specific checklist items; or who have checklist items that will expire soon.

If you are ready to add a new Checklist item now, choose Setup from the [menu \[pg:0215\]](#). Select Checklist, and click on the "Add a new checklist item" link. Our help topic on [how to setup checklist items \[pg:0916\]](#) explains how to create a new checklist item starting from this Checklist item setup screen.



## Related help

- [Help Topic 2245 \[pg:0148\]](#) - Finding the volunteers who need to complete a Checklist item
- [Help Topic 2244 \[pg:0146\]](#) - Viewing a volunteer's Checklist
- [Help Topic 2243 \[pg:0144\]](#) - Marking Checklist items complete
- [Help Topic 2242 \[pg:0921\]](#) - Making Checklist items apply only for certain assignments
- [Help Topic 2009 \[pg:0141\]](#) - How Volgistics calculates checklist item expiration dates
- [Help Topic 8009 \[pg:0608\]](#) - Volunteer checklist report (stock)
- [Help Topic 2254 \[pg:0150\]](#) - Tracking TB test requirements
- [Help Topic 2246 \[pg:1610\]](#) - Why a Checklist item may not apply to every volunteer

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## Marking Checklist Items Complete

Help topic 2243

Added or revised 06-20-2013

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If you use the Volgistics [Checklist \[pg:0142\]](#) features to track volunteer requirements, each of your volunteers has a 'Checklist' on their History tab showing you which items they've completed, and which they have not.

When a volunteer completes an item on their checklist you should 'mark-it-off' in their record.

### How to mark a Checklist item complete for an individual volunteer

If one volunteer has completed a particular Checklist item, you can simply check it as completed in their record. To do this:

1. Choose Volunteers from the [menu \[pg:0215\]](#).
2. Locate the volunteer's record. Once you've located their record, click on the link to their name.
3. Click on the 'History' tab for the selected volunteer. The History tab is where the volunteer's Checklist appears.
4. In the volunteer's Checklist box, place a checkmark next to the item they have completed.



**Checklist**

- application approved
- Department orientation
- Drivers license check
- Initial interview
- Name tag

Save Refresh

5. Click the **Save** button.

When you mark a Checklist item as completed, Volgistics displays the item on the volunteer's Checklist with a checkmark (showing that it has been completed). Volgistics also inserts a date entry on the volunteer's History tab showing the date the item was marked complete.

**Checklist**

- Application approved
- Department orientation
- Drivers license check
- Initial interview
- Name tag

---

**Dates**

	Event	Date	Expires	Notation		
Status	Prospect	03-14-2006			<a href="#">Edit</a>	
Checklist	Application approved	03-14-2006		Complete	<a href="#">Edit</a>	<a href="#">Delete</a>

If you want to change this date, click the Edit button for this entry on the Dates box (shown below), enter the new date, and then click the **Save** button.

**Dates**

	Event	Date	Expires	Notation		
Status	Prospect	03-14-2006			<a href="#">Edit</a>	
Checklist	Application approved	03-14-2006		Complete	<a href="#">Edit</a>	<a href="#">Delete</a>

If you mark a Checklist item as completed and the item is setup so it must be renewed or performed on a regular basis, the volunteer's Checklist will also show the next date the item is due.

**Checklist**

- Application approved
- Department orientation
- Drivers license check (due again on 03-14-2007 [Renewed](#))
- Initial interview
- Name tag

---

**Dates**

	Event	Date	Expires	Notation		
Status	Prospect	03-14-2006			<a href="#">Edit</a>	
Checklist	Application approved	03-14-2006		Complete	<a href="#">Edit</a>	<a href="#">Delete</a>
Checklist	Drivers license check	03-14-2006	03-14-2007	Complete	<a href="#">Edit</a>	<a href="#">Delete</a>

If the volunteer completes the item again before it expires, simply click the Renewed link on their Checklist. If the volunteer does not complete the item again before it expires, the item will again appear on their Checklist as incomplete (with an un-checked checkbox) when the expiration date arrives.

Note that there is an

**exception to this procedure**

: If you have setup a Checklist item to expire annually during the month of the volunteer's birthday (by selecting the "Annual [volunteer's birthday month]" option on the [Checklist item setup page \[pg:0916\]](#)) but a volunteer to whom this item applies lacks a date of birth entry on their Profile tab, the item will remain "pending" for them until a date of birth is entered in their record. Marking the item name and clicking Save will make the item appear complete *only after* a date of birth is entered on their Profile tab. If obtaining a date of birth entry for this individual is not feasible, you can add a Checklist date entry for the item in the Dates box on the History tab rather than

marking the box next to the item in the Checklist box. This will allow you to mark the item complete without requiring a date of birth entry on the volunteer's Profile tab.

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## Viewing a Volunteer's Checklist

Help topic 2244

Added or revised 06-21-2013

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Every volunteer you track in Volgistics has a [Checklist \[pg:0142\]](#) that includes all of the Checklist items that apply to them. You can look at this to see

- Which items they have completed
- Which items they currently need to complete
- When a completed item will need to be renewed next (if it expires)

Volunteer Checklists are located on the History tab in each volunteer's record. To view a volunteer's Checklist:

1. Select "Volunteers" from the [menu \[pg:0215\]](#).
2. Locate the volunteer's record and click on their name.
3. Select the History tab.

This is an example of a volunteer's History tab:

## Bailey, Harry

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

Save Cancel  Tagged New Previous Next

### Checklist

- Application approved
- Attends orientation
- Department orientation
- Drivers license check
- Health screening (due again on 03-02-2007 *Renewed*)
- Initial interview
- Name tag

Save Refresh

### Dates

	Event	Date	Expires	Notation		
Checklist	Health screening	03-02-2006	03-02-2007	Complete	Edit	Delete
Award	500 hour award	06-01-2000		Presented	Edit	Delete
Award	100 Hour award	06-01-1998		Presented	Edit	Delete
Checklist	Application approved	12-28-1996		Complete	Edit	Delete
Status	Active	12-22-1996			Edit	
Checklist	Initial interview	12-13-1996		Complete	Edit	Delete
Checklist	Drivers license check	12-06-1996		Complete	Edit	Delete
Date	Date of first contact	11-13-1996		Advertisement	Edit	Delete
Class	Customer Service Training	08-02-1996		Completed	Edit	Delete
Checklist	Attends orientation	06-04-1990		Complete	Edit	Delete

### Add

Add a:  date

Event:

Date:  Expires:

Notation:

Save Cancel

The Checklist box on the History tab lists all of the Checklist items that apply to a given volunteer (based on the way you setup each item). Each of the items the volunteer has completed appears on their Checklist with a checkmark.

The items that the volunteer still needs to complete appear without a checkmark.

In the illustration above, volunteer Harry Bailey has completed all of his Checklist items except for his "Department orientation" and "Name Tag."

The History tab also includes a Dates box that shows you when each of the completed Checklist items was last performed, and when they expire next (for items that must be repeated periodically).

### Related help

[Help Topic 2245 \[pg:0148\]](#) - Finding the volunteers who need to complete a Checklist item

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## Finding the Volunteers who Need to Complete a Checklist Item

Help topic 2245

Added or revised 04-04-2016

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The ability to see an individual volunteer's progress toward the [completion of their Checklist \[pg:0146\]](#) is important, but what if you want to know who **all** of the volunteers are that still need to complete a particular Checklist item? The Volgistics Tickler does just that.

To view a list of all of the volunteers who need to complete a specific Checklist item (or who have an item that will expire soon):

1. Choose Tickler from the [menu \[pg:0215\]](#). This opens a Tickler page similar to the one shown here:

### Tickler

**Include:**

---

#### Checklist

Show volunteers due for...

- Any checklist item
- 3-Month Evaluation
- Annual Competency Evaluation
- Assigned
- Background Check
- Confidentiality Form
- ERTK
- HIPAA
- Interview
- MMR
- Orientation Quiz
- TB Test

Include volunteers if they are...

- Due now
- Due in  2016
- Due in the next  days
- Past due more than  days

Volunteer checklists were last evaluated at 2:29 pm on 04-01-2016

2. The system evaluates volunteers to see if they are due for Checklist items during overnight maintenance each night. If you have made any recent changes to Checklists, or changes to volunteer records that will affect if they are due, we recommend clicking the **Re-evaluate now** button before searching for volunteers who are due.

If you have a large account, it may take some time for the system to re-evaluate all of your records. You can tell when the system is done by returning to the Tickler and checking if the time and date stamp has been updated.

Due in

Due in the next  days

Past due more than  days

Go

Volunteer checklists were last evaluated at 2:29 pm on 04-01-2016

Re-evaluate now

3. Under *Show volunteers due for...*, check the item(s) you're looking for. For example, if you want a list of all volunteers who still need to complete the quiz given after orientation, check the *Orientation Quiz* checkbox. You can check multiple items if you want the list to include volunteers who still need to complete any of the selected items. Check *Any checklist item* if you want to list all of the volunteers who still need to complete any Checklist item.

3. Under *Include volunteers if they are...*, check one or more of these options:

#### Due now

Your list will include the volunteers for whom any of the selected Checklist items currently need to be completed. *This selection will find volunteers due now for a one time item, or due now for a periodic or annual Checklist item.*

#### Due in...

Your list will include the volunteers for whom any of the selected Checklist items will expire in the month you specify. For example, if you want the list to include the volunteers for whom a Checklist item called *Annual Competency Evaluation* will expire in April 2016, check this option and choose *April* and *2016* from the month and year dropdown lists. *This selection will find volunteers due for annual or periodic Checklist items.*

#### Due in the next n days

Your list will include the volunteers for whom any of the selected Checklist items will expire sometime within the next "n" days. For example, if you want the list to include the volunteers for whom a Checklist item called *Annual Competency Evaluation* will expire in the next 90 days, check this option and enter "90" in the Days field. *This selection will find volunteers due for annual or periodic Checklist items.*

#### Past due more than n days

Your list will include the volunteers for whom any of the selected Checklist items expired sometime within the last "n" days. For example, if you want the list to include the volunteers for whom a Checklist item called *Annual Competency Evaluation* expired within the last 60 days (and has not yet been renewed), check this option and enter "60" in the Days field. *This selection will find volunteers due for annual or periodic Checklist items.*

4. Click the **Go** button.

If there are any volunteers who have Checklist items due (based on your Tickler selections) you'll see them listed like this:

## Tickler

Tag	Name	Item	Last Date	Expires
<input type="checkbox"/>	<a href="#">Barnes, Merry</a>	<input type="checkbox"/> Annual Competency Evaluation	04-01-2015	04-01-2016
<input type="checkbox"/>	<a href="#">Barra, Cathy</a>	<input type="checkbox"/> Annual Competency Evaluation	03-15-2015	03-31-2016
<input type="checkbox"/>	<a href="#">Castaneda, Deana</a>	<input type="checkbox"/> Annual Competency Evaluation	04-01-2016	04-13-2016
<input type="checkbox"/>	<a href="#">Drury, Judith</a>	<input type="checkbox"/> Annual Competency Evaluation	04-01-2016	04-19-2016
<input type="checkbox"/>	<a href="#">Fiedler, Shana</a>	<input type="checkbox"/> Annual Competency Evaluation	04-01-2016	04-20-2016
<input type="checkbox"/>	<a href="#">Knight, Stephanie</a>	<input type="checkbox"/> Annual Competency Evaluation	04-01-2016	04-11-2016
<input type="checkbox"/>	<a href="#">McGary, David</a>	<input type="checkbox"/> Annual Competency Evaluation	04-01-2016	04-18-2016
<input type="checkbox"/>	<a href="#">Murphy, Barbara</a>	<input type="checkbox"/> Annual Competency Evaluation	04-01-2016	04-10-2016
<input type="checkbox"/>	<a href="#">Smith, Kay</a>	<input type="checkbox"/> Annual Competency Evaluation	04-01-2016	04-12-2016
<input type="checkbox"/>	<a href="#">Valentine, Jeannette</a>	<input type="checkbox"/> Annual Competency Evaluation	04-01-2016	04-03-2016

↑

10 volunteers listed  
[Top](#)

↑

To mark the **checked** items as completed, check one or more items, enter the completion date here, and then click Save.

Date:

Next to each volunteer's name you'll see which of the Checklist items you selected in the Tickler are pending for that volunteer.

From here you can

[Tag \[pg:1538\]](#) these volunteers for the purpose of printing a report, sending an email message, or any **other task you can perform [pg:1999]** for tagged volunteer records.

- Check the box in the *Item* column to mark the selected Checklist items as complete.

Next: [Marking Checklist items complete \[pg:0144\]](#)

---

## Tracking TB test requirements

Help topic 2254

Added or revised 06-13-2016

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Many hospitals require some or all of their volunteers to be tested for TB on a regular basis. This help topic provides guidance on tracking TB test requirements in this specific scenario:

Scenario: Every volunteer is required to have TB screening when they first become a volunteer, however only the volunteers who have an assignment that involves patient contact are required to repeat the TB test periodically thereafter. In addition, volunteers who have patient contact assignments but who are known to have false positive TB test results are not required to have the annual TB Test, but instead are required to have a chest x-ray performed.

In this scenario the volunteer office is responsible for managing exceptions for volunteers who are known to have a false positive TB test results; and also for managing exceptions for volunteers who do not have an assignment that involves contact with patients.

## **Identify 'false positive' volunteers**

Start by identifying the volunteers known to have a false positive TB test result. You will do this by adding a Flag to the Core tab of each volunteer known to have false positive test result.

If you do not yet have a Flag for 'TB False positives' you can create one like this:

1. Choose Setup from the menu.
2. Select 'Field Options.'
3. Select 'Core tab.'
4. Click on the Flag field link.
5. Enter "TB False Positive" in the "Add a new item:" field and then click the Save button.

You now have a Flag that you can use to identify volunteers known to have a false positive TB requirement. If you currently have volunteers who are known to have a false positive test result you should add this flag to their records now. Also, as you encounter new volunteers in the future who you determine have false positive results, you'll need to add this Flag to their records too.

To add this flag to a volunteer's record:

1. Choose Volunteers from the menu.
2. Locate the volunteer the flag should be applied to, and click on their name.
3. On the Core tab, locate the Flags box.
4. Select the "TB False Positive" flag from the drop down list.
5. Click Save.

## **Create a field in the Assignment record for identifying the assignments that include patient contact.**

Follow the instructions in [Help topic 2242 \[pg:0921\]](#) to create a field for identifying which assignments involved patient contact.

## **Create the initial TB Screening Checklist item which will be required of all new volunteers**

If you have not yet done so, create a new Checklist item for tracking the initial TB Test screening which will be required for all volunteers. Note that in this example all new volunteers are required to perform this screening regardless of assignment or potential 'false positive' results. The reason we do not exempt 'false positive' volunteers from this item is that it is the initial screening that will typically determine that they return a 'false positive' result. Once this is determined in the initial screening you can add the 'TB False Positive' flag to their record so they are not included in the ongoing TB test Checklist item.

To create this Checklist item:

1. Choose Setup from the menu.



2. Select Checklist.
3. Click Add a new checklist item.
4. Configure the new item as shown here:

**Checklist item**

Item name:

Must volunteers complete another checklist item before this item applies?

No

Yes, this item applies  days after they complete the

How often must volunteers complete this checklist item?

One time  
Once a volunteer completes this item they are not required to complete it again later.

Periodic  
Volunteers must complete this item every  days from the date

Annual (same date for all volunteers)  
This item expires on   every year for all of the volunteers who must complete it. Volunteers  may  may not complete this item early.

Annual (volunteer's birthday month)  
This item expires on the  day of the volunteer's birthday month.  
Volunteers  may  may not complete this item early.

Upon expiration  
This item is required initially, and each time its expiration date arrives.

Every time  
This item is required each time a volunteer completes the pre-requisite checklist item selected above.

Never  
This item is not currently required for any volunteer.

Which volunteers should this item apply to?

If their Status is:

Active

Applicant

Inactive

Prospect

Under "Which volunteers should this item apply to?" check each of the volunteer Statuses you want this item to apply to. This would normally include "Active" however you may also want it to apply to other Statuses such as 'Applicant' or 'LOA.'

5. Click the Save button.

You now have an "Initial TB Screening" checklist item will apply to all volunteers, that volunteers must complete just once when the first become a volunteer.

**Create the ongoing TB Test Checklist item which will be required on an ongoing basis for all volunteers who have an assignment that involves patient contact.**

The next step will be to create a second Checklist item that will be for the ongoing TB test requirement. It will apply only to volunteers who are not flagged "TB False Positive" and who have any of your assignments that you've marked as involving patient contact. **Please note:** While the Checklist item may apply to the volunteers, it

will not show on the volunteer's History tab until the "Must volunteers complete another checklist item before this item applies?" date arrives. In this example, the ongoing item follows the initial item by 365 days, so 365 days must pass since the initial item was completed before the ongoing item will show on the volunteer's record.

To create this Checklist item:

1. Choose Setup from the menu.
2. Select Checklist.
3. Click Add a new checklist item.
4. Configure the new item as shown here:

**Checklist item**

Item name:

Must volunteers complete another checklist item before this item applies?

No

Yes, this item applies  days after they complete the

How often must volunteers complete this checklist item?

One time  
Once a volunteer completes this item they are not required to complete it again later.

Periodic  
Volunteers must complete this item every  days from the date it last expired

Annual (same date for all volunteers)  
This item expires on   every year for all of the volunteers who must complete it. Volunteers  may  may not complete this item early.

Annual (volunteers birthday month)  
This item expires on the  day of the volunteer's birthday month. Volunteers  may  may not complete this item early.

Upon expiration  
This item is required initially, and each time its expiration date arrives.

Every time  
This item is required each time a volunteer completes the pre-requisite checklist item selected above.

Never  
This item is not currently required for any volunteer.

Which volunteers should this item apply to?

If their Status is:

Active

Applicant

LOA

Prospect

If their Type  is  is not:

If their Flag  is  is not:

If they are in this set:

Those that have any assignment with:

Patient Contact

If their ROLE in the assignment is...

Assigned

Former's

Substitute

Trainee

Those assigned to:

If their Role in the assignment is...

Assigned

Former's

Substitute

Trainee

[Help](#)

Under "Which volunteers should this item apply to?" check each of the volunteer Statuses you want this item to apply to. This would normally include "Active" however you may also want it to apply to other Statuses such as 'Applicant' or 'LOA.'

Under "Those that have any assignment with" check the Patient Contact field you created earlier.

5. Click the Save button.

A Checklist item configured like the example shown above will apply one year after the volunteer completed the "Initial TB Screening," and every year thereafter (you can adjust the frequency at which this item must be repeated to suit your own policies). It will only apply to volunteers who have an assignment listed in the Assignment box (on their Service tab) that has patient contact, and only if their Role in that assignment is not 'Former.'

Remember that it is important to maintain the list of assignments that each volunteer has in this scenario. If you don't keep each volunteer's assignment list up-to-date the system will not know if they have an assignment that has patient contact.

An easy way to ensure that each volunteer's Assignment list is always up to date is to configure your database to automatically add assignments to this list each time a volunteer is schedule for, or has service posted for a new assignment. To configure your system to work this way:

1. Choose Setup from the menu.
2. Select Assignment tracking
3. Select Ground Rules.
4. Check "Record assignments automatically"

---

## Comparing Volunteers to the OIG LEIE

Help topic 2256

Added or revised 08-04-2015

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Click on a link in the *Contents* box below to be taken directly to that section of this help topic.

### Contents

Overview

How do I indicate that an Assignment requires screening?

How do I create a Checklist item for volunteers who need to be screened?

How do I find volunteers who need to be screened?

How do I configure an automatic report to run with these volunteers?

**Please note:** This help topic makes some assumptions about your policies for searching for volunteers in the LEIE, and should not be taken as legal advice. It's always best to check with your organization's HR or legal team to help you determine which, if any, volunteers will need to be screened.

In addition, this topic refers to an outside website, which was last reviewed by our team in August 2015. The links and instructions you see here may not reflect more recent changes to that site. See the OIG website for more information on current screening procedures and requirements.

### Overview

Healthcare organizations that receive some or all of their funding from Federal health care programs, like Medicare or Medicaid, may need to compare their volunteers with the List of Excluded Individuals and Entities, which is published online.

Note: Checking a volunteer's name against the OIG list is not the same as a background check. Your organization may require background checks for all volunteers, but only require this check for volunteers in certain positions.

If an individual is included on the list, it does not mean that they are not allowed to practice or that they cannot work or volunteer in a healthcare organization. But it does prohibit "payment by Federal health care programs for items or services furnished (1) by an excluded person or (2) at the medical direction or on the prescription of an excluded person. For purposes of Office of Inspector General (OIG) exclusion, payment by a Federal health care program includes amounts based on a cost report, fee schedule, prospective payment system, capitated rate, or other payment methodology."

For most organizations, this means that it's not really necessary to screen the vast majority of your volunteers. You only need to screen those that serve in Assignments that may result in you or your clients billing a Federal program.

These exclusions are nothing new--they started with the Medicare-Medicaid Anti-Fraud and Abuse Amendments, which passed through Congress in 1977. Over the past few decades changes have been made to the program and it has expanded beyond Medicare and Medicaid, but the effect of an exclusion is still limited to activities which are billable to Federal health care programs.

Whether or not your organization interfaces with a Federal health care program, you will likely only need to screen a small portion of your volunteers. This help topic shows you how to identify which volunteers need to be screened. Once you've identified them, you can search for them on the OIG's website.

If you're not sure whether you need to screen any of your volunteers, it's best to check with your organization's legal or HR department. Additionally, you have the option of seeking an advisory opinion from the OIG directly. You can learn about submitting a request on their website.

The basic idea presented here will follow the recommended practices from the OIG, which you can find on pages 15-16 in the

#### Special Advisory Bulletin

. These steps will help you determine which Assignments will require the volunteers to be screened and mark them. Then, create a Checklist item that applies to only the volunteers in those Assignments. Next, [create a monthly report \[pg:0473\]](#) that lists those volunteers that need to be screened. You can use this information to search for them on the OIG website. Finally, volunteers with no matches can have the [Checklist item marked as complete \[pg:0144\]](#).

If any matches are found in your search, you'll need to decide how best to handle this for your organization. If the individual has already been performing services that are billable to a Federal health care program, you can opt to disclose this yourself, and likely avoid most or all of the monetary penalties, using a self-disclosure protocol. You may also want to reference the Special Advisory Bulletin for guidance.

#### **How do I indicate that an Assignment requires screening?**

To indicate that an Assignment will require volunteers to be screened, you can use a spare checkbox on the Assignment tab. To get started:

1. Choose Setup from the menu.
2. Select Field options.
3. Click Assignment tab.
4. Choose one of your available spare checkboxes.

5. Enter a name of your choice (e.g. 'Requires OIG LEIE Check').

**volgistics**  
Volunteer Logistics

Volunteers  
Assignments  
Coordinators  
Schedule  
Tickler  
Post  
Tags  
Sets  
Print  
Mailbox  
Who's Here  
**Setup**  
Welcome  
Help  
Exit

## Setup - Field Options

**Field Properties** Save Cancel

**Spare checkbox 2**

Field location: **Assignment tab**

Type of field: **Checkbox**

Field name:

Hidden:

Default entry:  Checked

**System operator rights**

Volgistics Administrators:

Power users:

Basic users:

[Help](#) Save Cancel

6. Select 'No' from the 'Hidden' dropdown list

7. Click the Save button

Next, you'll need to review the responsibilities associated with each of your Assignments to determine which ones will require the volunteers to be screened. This will be a manual and internal process. For any Assignment that you believe should require volunteers to be screened, take these steps:

1. Choose Assignments from the menu.
2. Click the Assignment you would like.
3. Check the 'Requires OIG LEIE Check' checkbox.

**volgistics**  
Volunteer Logistics

Volunteers  
**Assignments**  
 Coordinators  
 Schedule  
 Tickler  
 Post  
 Tags  
 Sets  
 Print  
 Mailbox  
 Who's Here  
 Setup  
 Welcome  
 Help  
 Exit

## Emergency Department

Assignment | Coordinators | Profile | Description | Volunteers | Schedule | Rules

Save | Cancel | Combine, move or delete

**Name**  
 Site: Main Hospital  
 Place: Emergency Department  
 Assignment: Emergency Department  
 Cluster: Patient Care Assignments  
 Status: Active | Advertise | Sign-in option | Schedule reminders

**Address**

Street 1: 456 Your Street Address	Home:	<input type="checkbox"/> Ok to call
Street 2:	Work: (555) 555-5559	<input checked="" type="checkbox"/> Ok to call
Street 3:	Cell:	<input type="checkbox"/> Ok to call
City: Your City	Fax: (555) 555-5566	<input checked="" type="checkbox"/> Ok to call
State: MI   Zip: 49315	Pager:	<input type="checkbox"/> Ok to call
Email:	Other:	<input type="checkbox"/> Ok to call
Web site:		

**Detail**

Minimum age: 0  
 Spare dropdown 1: | Spare field 1:  
 Patient contact  
 Requires OIG LEIE Check

Save | Cancel | Combine, move or delete

4. Click the Save button to save your change.

### How do I create a Checklist item for volunteers who need to be screened?

To create this Checklist item:

1. Choose Setup from the menu.
2. Select Checklist.
3. Click 'Create a new checklist item'.
4. Enter a name for the Checklist item (e.g. 'OIG LEIE Check').
5. Under "How often must volunteers complete this checklist item?" select 'Periodic' and configure it so that volunteers must complete it every 30 days from the date it was last performed.

6. Under "Which volunteers should this item apply to?", under "Those that have any assignment with" check the 'Requires OIG LEIE Check' checkbox.

7. Click the Save button to save your changes.

### How do I find volunteers who need to be screened?

Now that you've identified the Assignments that will require volunteer screening, and you've configured the Checklist item as shown above, you can quickly find the volunteers who need to be screened. One option would be to [use the Tickler \[pg:0148\]](#). But since our current goal is to generate an automatic report, we'll need to create a Set instead. To do this:

1. Choose Sets from the menu.
2. Click the "Create a new Set" button.
3. Under "What would you like to call this set?" enter a name for your Set (e.g. 'OIG LEIE Check').
4. Under "Include volunteers in this set based on" choose 'Their checklist' and then click the Go button.
5. Configure your Set rule to include volunteers if their 'OIG LEIE Check' checklist item is 'Due now' or 'Due in the next 21 days'. (This will ensure that volunteers are checked at least once a month, even around short months and even if they were checked outside of the normal schedule.)

**Define a new set**

What would you like to call this set?

**Include volunteers in this set if...**

**Their checklist** Rule

Their  checklist item is...

Due now

or  Due in

or  Due in the next  days

or  Past due more than  days

They are currently eligible for the  award Help

Add another rule based on...

If you want this set to have an additional rule, select the kind of rule you want to add and then click the Go button.

Click the **Finished** button if you are finished defining this set

[Help](#)

6. Click the Finished button.

Now, you can always view the volunteers that need to complete this item from the Volunteers page by [loading this Set \[pg:0861\]](#). You can also configure a report to [include just these volunteers \[pg:0863\]](#) and to [print automatically \[pg:0473\]](#).

### How do I configure an automatic report to run with these volunteers?

Now that you've created a Set to find the volunteers who need to be screened, you can create a report that lists these volunteers and configure it to print automatically. In this case, we recommend using an Excel spreadsheet report. This gives you the ability to include archived volunteers, if desired. But if you prefer, you can alternatively use a Volunteer list report and print it in Excel format. To get started:

1. Choose Print from the menu.
2. Select Excel spread sheet.
3. Click Create a new excel spread sheet report.
4. On the Options tab, you can choose how you would like the report to be sorted. You can also choose if you would like to include archived records, non-archived records, or both.
5. On the Fields tab, you can choose which fields you would like on the report. Be sure to select the right information here, so you'll be able to positively match volunteers with listings from the OIG website. We recommend the following:



- First name
- Last name
- Street 1
- City
- State
- ZIP
- Date of birth
- SSN (if you track this)

6. On the Include tab, you can choose which volunteers you would like to include on the report. Under "Set" select 'This set' and choose 'OIG LEIE Check'.

7. On the Save tab, type a name for the report.

8. Under "Would you like this spreadsheet to be created on an automatic schedule?" select the second option and choose the day of the month you would like. Because the first and last days of the month are heavy with automatic reports, you can help ensure that the report appears first thing in the morning by choosing a different date, like the 5th or the 25th.

## OIG LEIE Report

**Save** [Help](#)

What would you like to call this report?

Report name:

Would you like this spreadsheet to be created on an automatic schedule?

No, do not create this spreadsheet automatically.

Yes, create it on the  of each month

Yes, create it every

Send it to:

[Help](#)

9. Click the Save and Print button.

10. Click Start printing, and the report will appear in you In Box shortly.

This report will be generated once now, and again on the regular schedule you selected. When the report appears in your In Box, open it so you can view the information.

### How do I screen these volunteers?

Now that you know which volunteers need to be screened, you'll need to perform the screening manually on the OIG website:

1. Visit <http://exclusions.oig.hhs.gov/Default.aspx>.

2. Here you can enter a single name or click "Search For Multiple Individuals" to enter up to 5 names at once. Then click the Search button.

The screenshot shows the 'Search the Exclusions Database' page. At the top, there is a search bar with the text 'Search For An Individual' and a question mark icon. Below the search bar, there are three navigation links: 'Search For Multiple Individuals', 'Search For A Single Entity', and 'Search For Multiple Entities'. The main search area contains two input fields: 'Last Name' and '(and/or) First Name'. Below these fields are two buttons: 'Search' and 'Clear'.

Keep in mind that there may be circumstances where a person's name might not match exactly what's on file with the OIG. For example, if a volunteer has a hyphenated last name, you should search for both names separately as well as together.

3. If no results are found, great! You can move on to the next volunteer on the list.

4. If some results are returned, click the last name or the 'Verify' link to view more detailed information about that individual. This will help you to better determine if that person matches your volunteer. To make sure that this is not a false-positive, enter the volunteer's Social Security Number and click 'Verify'.

The screenshot shows a detailed view of an individual's information. The fields are as follows:

First Name	[Redacted]
Middle Name	[Redacted]
Last Name	[Redacted]
DOB	12/07/1977
NPI	Unknown
UPIN	Unknown
General	NURSING PROFESSION
Specialty	NURSE/NURSES AIDE
Address	[Redacted]
Excl. Type	1128(a)(3)- FELONY HEALTH CARE FRAUD CONVICTION
Excl. Date	10/19/2007
Waiver	

Below the table, there is a text prompt: "To verify if you have a match, please enter a Social Security Number (SSN) or Employer Identification Number (EIN) without dashes (123456789)." followed by an input field and a green 'Verify' button with a checkmark icon.

**What should I do if a volunteer appears on the list?**

First, carefully compare the information in your Volgistics report with the information on the OIG website as described above. If you can, verify by entering the volunteer's Social Security Number.

If you have a positive match, determine if your organization has policies in place for handling this. If you don't have any policies in place, we recommend working with your HR or legal team to come up with a good way to handle these cases. We've got some ideas here, which should not be taken as legal advice.

If a volunteer appears on the list, and they have already performed service or provided items for which you have billed a Federal health care program, it's best to notify your organization's legal or HR team. In addition, you will likely want to follow the OIG's self-disclosure protocol. This is the best way to avoid liabilities. You may also want to reference the Special Advisory Bulletin for guidance.

If a volunteer appears on the list, but they haven't performed any tasks or provided any items for which you have billed a Federal health care program, you should still notify your organization's HR or legal team. But you may be able to simply re-assign them to a different area, without going through the self-disclosure protocol or terminating the volunteer.

In either case, if you need to report on what this volunteer was doing during their service, you can get this information using a [Volunteer Service Details \(stock\) \[pg:0612\]](#) report. Or you can [create a custom Service details report \[pg:0467\]](#).

---

# Coordinators

Help topic 1111

Added or revised 03-23-2017

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In addition to tracking volunteers and Assignments, Volgistics also includes features for tracking the people who supervise or manage each Assignment, and tools these people can use to perform certain tasks without having to be Volgistics **System Operators** [pg:0065] themselves. Volgistics calls the people who supervise or manage volunteers at the Assignment level *Coordinators*.

Coordinators are typically paid or volunteer staff with responsibility for coordinating or supervising volunteers in a specific Assignment. Here are some examples:

- At an animal shelter, volunteer *team leaders* coordinate the schedules for all of the volunteers in each of the shelter's Assignments. If a volunteer cannot serve as scheduled, they contact their *team leader* who handles the scheduling of a substitute. In this example, these team leaders could be Volgistics Coordinators.
- In a hospital, a hospital employee in each department is given responsibility for supervising the volunteers who serve in their department. In this example, these hospital staff could be Volgistics Coordinators.
- A *Retired Senior Volunteer Program* identifies a person at each different organization where their volunteers serve as their contact at that organization. In this example, these contact people could be Volgistics Coordinators.
- A human service agency appoints a *chairperson* for each volunteer Assignment. These chairpersons train and coordinate the activities of the volunteers in their designated Assignment. In this example, these chairpersons could be Volgistics Coordinators.

This help topic covers more about how to create and use Coordinator records in Volgistics. You can click on a link in the *Contents* box to go directly to a section of the help topic.

## Contents

The Coordinator Record

Connecting Coordinators and Assignments

What Coordinators Can Do

Communication for Coordinators

## The Coordinator Record

As with volunteers, each Coordinator's information is stored in their own record. You get to your Coordinator records by choosing *Coordinators* from the menu. To see Coordinators currently in your account, click on letter to see Coordinators whose last names start with that letter. Or click the *All* link to see all Coordinators in your account.

To start a new Coordinator record, click the **New coordinator** button. Enter at least a last and first name and then click the **Save** button. You can return to the record later to add more information.

The following tabs make up the Coordinator record: Coordinator tab, Assignments tab, Volunteers tab, Schedule tab and Vic tab. Each is explained below.

### Coordinator tab

The Coordinator tab contains Name, Address, and Email (or Email and Text) Preferences boxes. It is used to store Coordinator contact information and track which types of messages they will receive.

#### Assignments tab

The Assignments tab lists the names of Assignments the Coordinator is responsible for managing or coordinating. It includes an "Add" box to add new Assignments to the Coordinator's record.

#### Volunteers tab

The Volunteers tab in the Coordinator record lists all volunteers who have one or more of the Coordinator's Assignments. A [System Operator \[pg:0065\]](#) can view the list of only volunteers with the [Role \[pg:0103\]](#) of "Assigned" in the Coordinator's Assignments, or volunteers with any Roles and [Statuses \[pg:1832\]](#) they specify. From this tab, a System Operator can [tag \[pg:1538\]](#) a Coordinator's volunteers, [send a mass message \[pg:0402\]](#) to all of them, or change their Roles in the Coordinator's Assignments. The Volunteers tab on the Coordinator record works similarly to the Volunteers tab on an Assignment record. [Help topic 2221 \[pg:0131\]](#) has more information about the settings on this tab.

#### Schedule tab

The Schedule tab displays the schedule for volunteers assigned to the Coordinator's Assignments. A System Operator can schedule a Coordinator's volunteers from this tab.

#### Vic tab

A Coordinator's Vic tab is where System Operators manage the Coordinator's access to [VicNet \[pg:1724\]](#). If a Coordinator cannot currently access VicNet (for example, if their record lacks an email address or an organization has prevented Coordinators from accessing VicNet on the [VicNet Ground rules page \[pg:1447\]](#)), this tab will display the reason. In addition, the Coordinator's VicNet password can be changed, or a password link can be sent to the Coordinator from this tab. You can learn more about this tab in [help topic 1076 \[pg:1810\]](#).

#### **Note:**

Service, including hours or any other service measures used by the organization, cannot be tracked for Coordinators. If an organization wants to track a Coordinator's hours, they must create a separate volunteer record for them (in addition to the Coordinator record). [Help topic 1093 \[pg:1653\]](#) explains how [VicNet \[pg:1724\]](#) works for individuals who are both a Coordinator and a volunteer.

### **Connecting Coordinators and Assignments**

In Volgistics, Coordinators and volunteers are not assigned to one another directly--they are connected only when they share the same Assignment(s).

Coordinators may have a single Assignment, multiple Assignments, or all of the Assignments at a given Site or Place.

Take the following steps to add an Assignment, Site or Place to a Coordinator's Assignments tab:

1. Choose Coordinators from the menu.
2. Click the letter of the Coordinator's last name, or the *All* link at the top of the page.
3. Click on the name of the Coordinator for whom you would like to add an Assignment.
4. Go to their Assignments tab.

5. Locate the Add box. In the Assignment dropdown field, select an individual Assignment name, or the name of a Place or Site. If a Place or Site name is selected, the Coordinator will be associated with each Assignment (or Place and Assignment) that falls under the chosen Place or Site, respectively.
6. In addition to the Assignment field, the Add box on the Assignments tab contains any Coordinator relationship fields used by the organization. Enter any appropriate information into the fields present on the Add box.
7. Click the **Save** button.

Once an Assignment (or Site or Place) has been added to a Coordinator's Assignments tab, all volunteers who have this Assignment (or any Assignment under this Site or Place) on their Service tab become this Coordinator's volunteers. See [help topic 2173 \[pg:0103\]](#) to learn how to add volunteer Assignments and Roles.

## What Coordinators Can Do

Since a Coordinator's role is typically more limited than the role of an organization's overall volunteer leader, it usually is not necessary or desirable for an organization to make each of their Coordinators a [System Operator \[pg:0065\]](#) in Volgistics. It would often not be practical to train each Coordinator in the whole Volgistics system, and it's often not desirable for these people to have as much access to Volgistics as a System Operator might.

Instead, Volgistics provides a way for Coordinators to access the system through the [VicNet module \[pg:1724\]](#). The VicNet module provides Coordinators with a simplified interface; access only to the volunteers who have the Coordinator's Assignment (or Assignments); and features for performing the most common supervisory tasks only (such as scheduling or updating contact information). Coordinators can access VicNet from any Internet connected computer--in their office, home, or even on the road. All that is required is an Internet connection.

[Help topic 1093 \[pg:1653\]](#) has information on how VicNet will work if the person has a Coordinator and a volunteer record in the system.

Unlike *System Operators*, the number of *Coordinators* you add does not affect your account's [Service Level \[pg:0719\]](#). (Each Volgistics *System Operator* you add to your account after the first two increases your Service Level; however, you can add as many *Coordinators* as you need without increasing your account's Service Level). For this reason, Coordinators do not have access to all the same tools as System Operators.

One way to get an idea of what Coordinators can, and cannot, do is to watch the training videos designed to show Coordinators how to use VicNet. You can find these videos here.

There are two different videos because accounts can setup Coordinator access differently depending on their needs. The options for setting up VicNet for Coordinators are on the pages you access by selecting [Setup \[pg:0887\]](#) from the menu, and then expanding the VicNet link.

## Communication for Coordinators

There is not a way for Coordinators to send messages to their volunteers, or to other Coordinators and System Operators through the system. However, a [System Operator \[pg:0065\]](#) can send email, Vic mail, and/or text messages to a Coordinator's volunteers on behalf of the Coordinator. [Help topic 2193 \[pg:0402\]](#) shows how to do this.

[System Operators \[pg:0065\]](#) can also send custom messages to a single Coordinator or to all Coordinators. Messages can be sent by [email \[pg:0404\]](#), [Vic mail \[pg:0315\]](#) or [text message \[pg:0343\]](#). In order to send text messages, your account must [enable text messaging \[pg:0321\]](#) and the Coordinator must [opt-in \[pg:1948\]](#) to receive text messages.

Coordinators can also receive [schedule reminder \[pg:0791\]](#) messages to show them the coverage for upcoming assignments. These can be sent by email or text depending on if the Coordinator has opted-in for texting and his or her [message preferences \[pg:0381\]](#). You can find information on setting up daily schedule reminder messages for Coordinators in [help topic 2494 \[pg:1403\]](#). For monthly reminders, please see [help topic 2492 \[pg:1400\]](#).

Coordinators can also receive [self-scheduling \[pg:1494\]](#) alerts to let them know when a volunteer has added and/or removed themselves from the schedule for an assignment. To set this up, go to the Rules tab of the Coordinator's assignment(s). You can find more information on this [here \[\\_\\_\\_\\_\\_\]](#).

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## How to Handle Individuals Who are Both a Coordinator and a Volunteer

Help topic 1115

Added or revised 11-30-2007

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Coordinators are sometimes paid staff or other non-volunteers, however the people who serve as coordinators may themselves be volunteers. When an individual performs both coordinator and volunteer duties, organizations often want to track the person's volunteer hours. [Coordinator records \[pg:0163\]](#) are designed differently from volunteer records. There is not a way to track a coordinator's service in the coordinator record. Therefore, both a volunteer record and a coordinator record should be created for this type of individual.

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## How to Use VicNet: a Brief Guide for Coordinators

Help topic 1230

Added or revised 03-10-2017

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*This help topic is intended to help [Coordinators \[pg:0163\]](#) better understand how to use the VicNet module.*

If you prefer a video tutorial format instead of the written help topic, the following videos explain more about how to use VicNet. Each video shows a different way an organization may have VicNet setup. Choose the video that matches your organization's VicNet setup the closest.

The VicNet module is a tool the organization you work with may use. You access the VicNet module over the Internet and you can use it to:

- View the schedule for the assignment(s) you oversee
- Manage and update the schedule for the assignment(s) you oversee (if your organization allows)
- View information related to the volunteers you oversee
- Enter and update information related to the volunteers you oversee (if your organization allows)
- Receive news and messages from the volunteer office
- Change your VicNet password
- Opt-in or out of text messaging and update your message preferences

Each organization sets up VicNet according to what works best for their needs--so you may not be able to do everything listed above. This will depend on how your organization opted to use the features.

*This guide shows the desktop view of VicNet. If you are accessing VicNet on a mobile device, the view of what you see will be different. However, the same basic functionality is available.*

You can click on a link in the *Contents* box below to go directly to a section in the help topic.

## Contents

[Logging into VicNet](#)

[Navigating VicNet](#)

[Home Tab](#)

[Mail Tab](#)

[Volunteers Tab](#)

[My Schedule Tab](#)

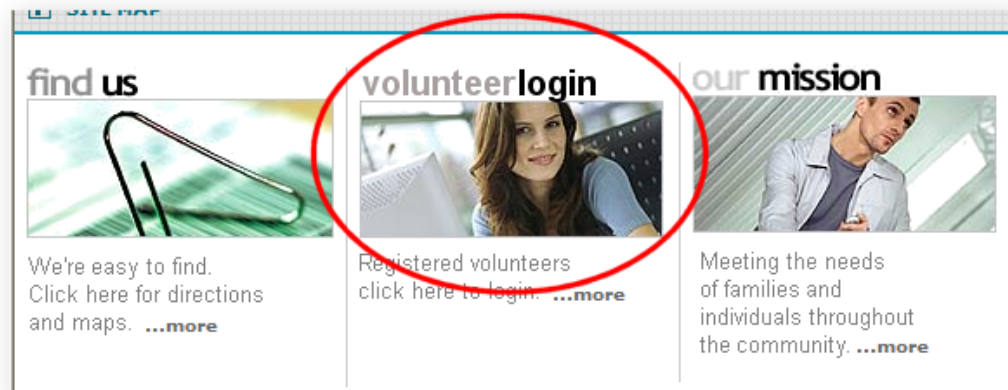
[Account Tab](#)

## Logging into VicNet

In most cases, you get to your organization's VicNet login page through the organization's website. An organization may choose to send you a URL address that you can use to login, but most of the time there will be a link to the VicNet login page somewhere on the organization's website. It may be a simple text link like this:

[Volunteer Login](#)

Or, it may be a graphic link like this:



Your organization should provide you with directions on how to locate the webpage you will need to use to login. When you click on the link (or go to the URL address your organization provides you with) you will see a login page similar to this one:



Enter the email address your organization has on file for you in the *Login name* field. If you do not know this email address, you will need to contact your organization for assistance.

Enter your password in the *Password* field and then press the **Go** button.

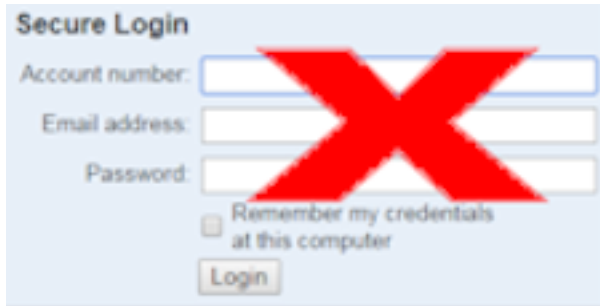
In most cases, you will receive a link to set your password in an email message from your organization. You follow the link to create the password you will use to login with. In other cases, your organization may have set a temporary password for your record and let you know the temporary password.

In addition to your Coordinator record, you may also have a volunteer record at the organization you work with. Please keep in mind that these are two separate records. You will use the volunteer record to do things such as update your own information, look at your schedule, and enter service information. Whereas the Coordinator record will be used for things such as viewing information for volunteers who work in the assignment(s) you oversee, or seeing the entire schedule for the assignment(s) you oversee. When you have a volunteer and a Coordinator record, your login experience will vary depending on the email and password associated with each record.

- If your volunteer record and Coordinator record use different email addresses, you will be taken to one account or the other depending on which email address you entered.
- If your volunteer record and Coordinator record use the same email address, but have different passwords, you will be taken to one account or the other depending on which password you entered.
- If your volunteer record and Coordinator record use the same email address, and the exact same password, you will see a screen when you login prompting you to select which record you'd like to go to.

If you forget your password, or are not able to locate any password information from your organization, click the *Forget your password?* link that appears on the login screen. As long as the email address you enter matches the address on your Coordinator record, this will send an email message with a password link to you. You can follow this link to set a password to login with. **Please note that the password link only remains active for 24 hours. If you click on the link but it has expired, just click the *Forget your password?* link again to have a new link sent.**

You can find more information on how to use the *Forget your password?* link [here](#) [pg:1975].



## Navigating VicNet

All tabs in VicNet are highly customizable by individual organizations. Therefore, it is difficult to say exactly what type of content will be displayed on the various tabs, or even if a tab will be visible to you at all. The following information explains the basic purpose of each tab that can be displayed and provides visual examples of how the tab might look. Your view in VicNet may be different depending on how your organization has setup their VicNet module.

### The Home tab

The first tab displayed when you login is the Home tab. The following image is an example of what a VicNet Home tab might look like:

The Home tab is shared between volunteer and Coordinator records so there may be information on it that is more for volunteers than Coordinators. One useful thing to note if you are a person who has both a volunteer and Coordinator record is that you can easily verify which record you're signed-in as by checking the wording at the top. If the message has *Coordinator* in it, you're signed-in with your Coordinator record. If the message has *volunteer* in it, you're signed-in with your volunteer record.


From the Home tab, you can access any of the other available tabs, or click on any buttons or links your organization has chosen to include.

#### The Mail tab

The Mail tab in VicNet is where you can see messages (called Vic Mail) sent to you from the leaders of your organization. You may also receive messages by email or by text (if you're opted in to receive text messages).

New Vic Mail messages appear on top, and a list of read messages appears on the bottom. To read a message, click on the Subject of the message.

Here is an example of what a VicNet Mail tab might look like:



## Volunteer Information Center

### Coordinator information for Elaine Robinson

Home Mail Volunteers My Schedule Account

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#### New messages

Subject	Sent
<b>Bedford Falls 10K</b> Hello!	03-10-2017

If you haven't heard, we are proud to be a co-sponsor for this year's Bedford Falls 10K run. This event is an important fund raiser for our organization, plus it promotes health and wellness.

This year's 10K run will be held on Saturday, April 15th at 9:30 am. As a co-sponsor, we are responsible for staffing the registration booth from 7:00 am - 8:00 pm on Friday, April 14th as well as from 7:00 am to 9:00 am on the morning of the race.

Registration booth staff will hand out race day packets and t-shirts to participants. We need supervisors to head up the registration booth to make sure the booth is opened on time, staffed with volunteers, and materials are available to distribute. If you're interested in being a supervisor, please call Carol at 555-892-3391.

Thank you,  
Carol Luden

[Close](#)

---

#### Old Messages

Subject	Sent
New Parking Permit Form Needed	03-10-2017

Exit

### Volunteers tab

The Volunteers tab will list the volunteers who have a [Role \[pg:0103\]](#) in an assignment that you oversee. Your organization's administrator(s) selects what [Status\(es\) \[pg:1832\]](#) and Roles a volunteer must have in order to appear on your list. If volunteers do not show on your list, and you feel they should, you will need to contact an administrator at the organization you serve with so she can compare the account's settings with the volunteer's record.



## Volunteer Information Center

### Coordinator information for Elaine Robinson

[Home](#) [Mail](#) [Volunteers](#) [My Schedule](#) [Account](#)

#### Volunteers

Name	Assignment	Role
Barra, Cathy Home: (609) 995-0118 cathybarra@spambob.com	Floor 3 Reception Desk [Main Hospital/Reception]	Assigned
Campbell, Diane Cell: (214) 549-9771 dianeccampbell@mailinator.com	Floor 4 Reception Desk [Main Hospital/Reception]	Assigned
Egan, Olympia Home: (909) 912-5859 olympiamegan@trashymail.com	Floor 3 Reception Desk [Main Hospital/Reception]	Assigned
Golliday, Sophie Cell: (203) 510-5535 sophieggolliday@trashymail.com	Floor 4 Reception Desk [Main Hospital/Reception]	Assigned
Jackson, Jennifer jenniferjackson@dodgit.com	Floor 3 Reception Desk [Main Hospital/Reception]	Substitute
Posada, Margaret Home: (334) 359-2850 margaretrposada@trashymail.com	Floor 3 Reception Desk [Main Hospital/Reception] Floor 4 Reception Desk [Main Hospital/Reception]	Assigned Substitute
Robinson, Pamela Home: (830) 268-1097 Cell: (212) 882-9203 pamelaerobinson@dodgit.com	Floor 4 Reception Desk [Main Hospital/Reception]	Assigned
Weldon, Samuel	Floor 3 Reception Desk [Main Hospital/Reception]	Substitute

If your organization allows, you can also view, and possibly enter or update, additional information for volunteers. If you're allowed to do this, you can click on a volunteer's name to see more information:

### Coordinator information for Elaine Robinson

[Home](#) [Mail](#) [Volunteers](#) [My Schedule](#) [Account](#)

#### Volunteers

Name	Assignment	Role
Barra, Cathy Home: (609) 995-0118 cathybarra@spambob.com	Floor 3 Reception Desk [Main Hospital/Reception]	Assigned
<b>Campbell, Diane</b> Cell: (214) 549-9771 dianeccampbell@mailinator.com	Floor 4 Reception Desk [Main Hospital/Reception]	Assigned
Egan, Olympia Home: (909) 912-5859 olympiamegan@trashymail.com	Floor 3 Reception Desk [Main Hospital/Reception]	Assigned

This will bring you to a page where you can see whatever additional information about the volunteer the organization selected for you to see. If you are not allowed to enter or update the field, it will be set to read only. If you are allowed to enter or update the field, you will be able to make changes, and click the **Save** button to keep your changes.



## Volunteer Information Center

Coordinator information for **Elaine Robinson**

[Home](#) [Mail](#) [Volunteers](#) [My Schedule](#) [Account](#)

**Diane Campbell** [Return to volunteers](#)

### Contact Information

First name: **Diane**  
Last name: **Campbell**  
Title: **Ms.**  
Street 1: **2739 Kelly Drive**  
Street 2:   
City: **Wyoming**  
State: **MI** Zip: **49509**  
Home phone: **(304) 897-9477**  OK to call me here  
Work phone:   OK to call me here

**Save**

### Demographics

We collect the following information only to help us get a better idea of the demographic make-up of our volunteers.

Date of birth: **9-14-1996**  
T-Shirt Size: **02 S**  
Ethnicity: **White/Caucasian**

**Save**

### Availability

The days times this volunteer is usually available to serve

When you're done, click the *Return to volunteers* link to go back to the page that lists all of your volunteers.

Coordinator information for **Elaine Robinson**

[Home](#) [Mail](#) [Volunteers](#) [My Schedule](#) [Account](#)

**Diane Campbell** [Return to volunteers](#)

### Contact Information

First name: **Diane**  
Last name: **Campbell**

### My Schedule tab

Your My Schedule tab will show the combined schedules for all of the assignments that you oversee. In most cases the current month is displayed by default, but in some cases (such as a special event) the calendar may be set to default to a different month.



## Volunteer Information Center

Coordinator information for **Elaine Robinson**

[Home](#) [Mail](#) [Volunteers](#) [My Schedule](#) [Account](#)

March 2017

[Prev month](#)

[Next month](#)

Sunday Monday Tuesday Wednesday Thursday Friday Saturday

Feb 26	Feb 27	Feb 28	1	2	3	4
<input type="checkbox"/> 10:30 a - 2:30 p Floor 3 Reception Desk M. Posada C (216) 851-5135 <input type="checkbox"/> 10:30 a - 2:30 p Floor 4 Reception Desk D. Campbell C (214) 549-9771 <input type="checkbox"/> 2:30 p - 6:30 p Floor 3 Reception Desk E. Zimmerman C (207) 727-2046 <input type="checkbox"/> 2:30 p - 6:30 p Floor 4 Reception Desk S. Golliday C (203) 510-5535 <input type="checkbox"/> 6:30 p - 10:30 p Floor 3 Reception Desk C. Barra C (219) 797-9048 <input type="checkbox"/> 6:30 p - 10:30 p Floor 4 Reception Desk						<input type="checkbox"/> 10:30 a - 2:30 p Floor 3 Reception Desk O. Egan C (206) 387-7744 <input type="checkbox"/> 10:30 a - 2:30 p Floor 4 Reception Desk P. Robinson C (212) 882-9203 <input type="checkbox"/> 2:30 p - 6:30 p Floor 3 Reception Desk E. Zimmerman C (207) 727-2046 <input type="checkbox"/> 2:30 p - 6:30 p Floor 4 Reception Desk S. Golliday C (203) 510-5535 <input type="checkbox"/> 6:30 p - 10:30 p Floor 3 Reception Desk C. Barra C (219) 797-9048 <input type="checkbox"/> 6:30 p - 10:30 p Floor 4 Reception Desk
5	6	7	8	9	10	11
<input type="checkbox"/> 10:30 a - 2:30 p						<input type="checkbox"/> 10:30 a - 2:30 p

You can select a date on the calendar to see more information about that day's schedule.

Your organization may select to include schedule icons on the schedule. If so, here is what they mean:

- An empty box indicates shift opening slots where volunteers are needed. In the picture below, these are the *Special Projects* open slots.
- A figure inside of a box indicates an individual volunteer is scheduled to fill the opening slot. In the picture below, volunteer *Olympia Egan*, who is filling the shift for the *Floor 3 Reception Desk* assignment, is an example of this.
- A group of figures inside of a box indicates the slot is filled by a group member. In the picture below, the *Grand Valley State University Student Union* group members filling the shifts for the *Special Projects* assignment is an example of this.
- A figure without a box around it indicates a volunteer placed on the schedule without filling an open shift. In the picture below, volunteer *Mina Melanson* who is on the schedule for the *Special Projects* assignment is an example of this.



## Volunteer Information Center

Coordinator information for **Elaine Robinson**

[Home](#) [Mail](#) [Volunteers](#) [My Schedule](#) [Account](#)

### Saturday, March 25, 2017

	From	To	Assignment	Volunteer	Reg
 <a href="#">Change</a>	8:30 a	12:30 p	Special Projects	Melanson, Mina Will help coordinate work crew	
<input type="checkbox"/> <a href="#">Change</a>	9:00 a	12:00 p	Special Projects Landscaping	Open	
<input type="checkbox"/> <a href="#">Change</a>	9:00 a	12:00 p	Special Projects Landscaping	Open	
 <a href="#">Change</a>	9:00 a	12:00 p	Special Projects Landscaping	Grand Valley State University Student Union	
 <a href="#">Change</a>	9:00 a	12:00 p	Special Projects Landscaping	Grand Valley State University Student Union	
 <a href="#">Change</a>	9:00 a	12:00 p	Special Projects Landscaping	Grand Valley State University Student Union	
 <a href="#">Change</a>	10:30 a	2:30 p	Floor 3 Reception Desk	Egan, Olympia	Yes
 <a href="#">Change</a>	10:30 a	2:30 p	Floor 4 Reception Desk	Robinson, Pamela	Yes
<input type="checkbox"/> <a href="#">Change</a>	2:30 p	6:30 p	Floor 3 Reception	Zimmerman, Elena	Yes

If your organization allows you to change the schedule, there will be a *Change* link by the schedule entry for volunteers who are already on the schedule, or by unfilled opening slots where volunteers are still needed. Click the link to update the schedule entry, or add a volunteer to an unfilled opening space.

### Saturday, March 25, 2017

	From	To	Assignment	Volunteer	Reg
 <a href="#">Change</a>	8:30 a	12:30 p	Special Projects	Melanson, Mina Will help coordinate work crew	
<input type="checkbox"/> <a href="#">Change</a>	9:00 a	12:00 p	Special Projects Landscaping	Open	
<input type="checkbox"/> <a href="#">Change</a>	9:00 a	12:00 p	Special Projects Landscaping	Open	
 <a href="#">Change</a>	9:00 a	12:00 p	Special Projects Landscaping	Grand Valley State University Student Union	
 <a href="#">Change</a>	9:00 a	12:00 p	Special Projects Landscaping	Grand Valley State University Student Union	
 <a href="#">Change</a>	9:00 a	12:00 p	Special Projects Landscaping	Grand Valley State University Student Union	
 <a href="#">Change</a>	10:30 a	2:30 p	Floor 3 Reception Desk	Egan, Olympia	Yes
 <a href="#">Change</a>	10:30 a	2:30 p	Floor 4 Reception Desk	Robinson, Pamela	Yes

You can only add volunteers to the schedule for unfilled opening slots (the empty box icon). Volunteers who are on the schedule without filling an opening slot (the icon of the figure without a box around it) have either scheduled themselves, or been placed on the schedule by an operator in the main account. You can update the schedule entry for these volunteers, but you cannot place them on the schedule initially.

When you place a volunteer on the schedule as filling an opening slot, you will only be able to put her on for a single date to start.



## Saturday, March 25, 2017

### Schedule entry

Date: Saturday, March 25, 2017

Assignment: Special Projects  
Landscaping

Times: 9:00 a to 12:00 p

Choose the volunteer you want to schedule:

Volunteer note:

Save

Cancel

If you wish to make the volunteer a regular volunteer (one who serves in a repeating pattern such as every Monday, or every other Friday), you will need to return to the date you placed the volunteer on the schedule and click the *Change* link again.

In addition to placing the volunteer on the schedule on a regular basis, you can also click the *Change* link by volunteers who are scheduled to change the volunteer's scheduled times, schedule a substitute for the volunteer, remove the volunteer from the schedule, or add a note to the volunteer's schedule entry.

## Saturday, March 25, 2017

### Schedule entry

Date: Saturday, March 25, 2017

Assignment: Floor 3 Reception Desk

Times:  to  (regularly)

Volunteer: Olympia Egan

- No change
- Schedule this substitute:
- Remove Olympia Egan from the schedule for this date only
- Remove Olympia Egan from this schedule for this date, and all days forward
- Remove Olympia Egan as a regular volunteer from this schedule completely

Regular schedule:

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Every	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
1st	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2nd	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3rd	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4th	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5th	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Alternate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Starting:

- Ongoing
- Ending:

Volunteer note:

Save

Cancel

### Please Note:

When placing a volunteer on the schedule in a repeating pattern, we recommend reviewing the upcoming schedule to make sure no one is scheduled. For example, if you're placing the volunteer on the schedule for every Friday, look at the schedule for a few upcoming Fridays to make sure there is an unfilled opening slot

available for the shift you're scheduling the volunteer for.

### The Account tab

The Account tab is where you will go to set a permanent password, change your permanent password, opt-in or out of text messaging, and change your message preferences. If you sign-in with a temporary password, you will be directed to the Account tab before you can access the other tabs.

If you do not have a password, or have forgotten it, you can have a link sent to you so you can create a password. You can learn more about how this works [here \[pg:1975\]](#).

If the organization you work with has enabled text messaging, you will also see a section on the Account tab for text messaging. You can use this section to opt-in to text messaging, opt-out of text messaging, or change the types of messages you receive by text. You can find information on how to do these things [here \[pg:1948\]](#).

An example of how the Account tab may look is shown below:

**Your Logo Here**

## Volunteer Information Center

### Coordinator information for Elaine Robinson

Home Mail Volunteers My Schedule **Account**

#### Change your password

You can change the password you use to access your volunteer information. Enter your current password, enter your new password twice, and then click the Save button.

Your new password must:

- Be different from your current password.
- Be between 5 and 30 characters long.
- Contain both letters and numbers.

Enter your **current** password here:  \*(Required)

Enter your **new** password here:  \*(Required)

Enter your **new** password again:  \*(Required)

[Help](#) [Save](#)

#### Message Preferences (Email / Text Messaging)

Use this section to opt-in and opt-out of text messaging (also known as "SMS"). You can change preferences for how you would like to receive messages, whether as emails, text messages, or none.

1. Please Enter Your Mobile Device Number:

Volgistics Volunteer Alerts sends reminders, alerts, and custom messages from System Operators over text messaging (SMS). Please tell us where we can send messages:

Enter a mobile phone number  Your country

If you prefer a video tutorial format instead of the written help topic, the following videos explain more about how to use VicNet. Each video shows a different way an organization may have VicNet setup. Choose the video that matches your organization's VicNet setup the closest.



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# Volgistics System Requirements

Help topic 1012

Added or revised 12-06-2016

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You can use Volgistics from any PC or Mac, anywhere, as long as it has an Internet connection and any popular web browser, including Internet Explorer, Microsoft Edge, Firefox, Safari, and Chrome.

Rather than installing software on your computer, you use the Volgistics system over the Internet through your web browser. Volgistics operates from a centrally located, [secure \[pg:0181\]](#) data center. You don't need to worry about installing or maintaining any software, or losing valuable data due to computer error--your data is backed up for you, continually. New features are added automatically so you never have to purchase or install software upgrades.

## Internet Connection

You can use Volgistics from computers with any kind of Internet connection, including dial-up, wireless, and broadband connections. If you plan to use Volgistics regularly from a particular location (such as your office), a broadband or high-speed connection such as DSL, cable modem, or T1 is recommended for that computer (if your connection to the Internet fails, you would need to restore the connection or move to a computer that has an Internet connection available in order to access Volgistics).

## Browsers

You can use Volgistics through any of these web browsers. *Because web browsers are continually updated to address security vulnerabilities, we recommend using the latest version of the browser whenever possible. At the very least, the web browser in use must be a supported version.*



### *Internet Explorer*

Internet Explorer comes with Microsoft Windows operating systems. You can freely download Internet Explorer from the Microsoft website. In order to launch the optional [VicTouch \[pg:1778\]](#) module in kiosk mode on a computer with a touchscreen monitor, you will need to use either Internet Explorer or Google Chrome.



### *Microsoft Edge*

Microsoft Edge is the default browser for the Windows 10 operating system. You can learn more about the Edge browser on Microsoft's website.



### *Firefox*

Firefox is a web browser from Mozilla. It is freely available download at the Mozilla website.



### *Safari*

Mac users can use Volgistics with Apple's Safari browser. Safari requires an up-to-date version of Mac OS X, and is freely available from Apple.



### *Chrome*

Users can use Volgistics with Google's Chrome browser. Chrome is freely available from Google. In order to launch the optional [VicTouch \[pg:1778\]](#) module in kiosk mode on a computer with a touchscreen monitor, you will need to use either Google Chrome or Internet Explorer.

## **Viewing Reports in Volgistics**

In order to view [PDF \[pg:0449\]](#) reports you print from Volgistics, you'll need Adobe Reader or another program capable of opening PDF files. You can download Adobe Reader from the Adobe web site for free.

## **JavaScript**

Browsers where you'll use Volgistics must permit JavaScript from web pages at [www.volgistics.com](http://www.volgistics.com). [Help Topic 2277 \[pg:1617\]](#) explains how to enable JavaScript.

## **Cookies**

Volgistics does not require cookies unless you would like computers to remember your account number and login name for the Login page.

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## **How reliable is Volgistics?**

Help topic 1013

Added or revised 06-20-2013

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Your ability to access your volunteer information as often as you choose, 24 hours a day, is one of the top priorities at Volgistics. Here are some of the ways we protect your information.

## **Redundancy**

Volgistics is powered by a server farm with no *single-point-of-failure*. Should one component fail, others take over automatically. Critical components contain redundant power supplies and disk arrays. Dual high-speed data connections from separate Internet backbone providers connect the Volgistics data center to the Internet, ensuring operation even if one provider's network fails. In addition, a remote secure stand-by system is ready to go if it's needed. Automatic emergency power systems ensure uninterrupted service during commercial power failures.

### **24/7 Monitoring**

Volgistics monitors system performance around the clock. Volgistics engineers see key network and system conditions as they occur, enabling a prompt response should any system adjustments be required.

### **Data backup**

Volgistics protects your data through a series of backup procedures without disrupting system operation. These include daily full system backups, and data transfers to the remote stand-by system.

### **Disaster planning**

A Volgistics disaster response plan is in place for handling possible eventualities that range from the loss of the primary data center, to spikes in demand that might occur following a national emergency.

### **Scheduled maintenance**

System maintenance which prevents you from accessing the system is required infrequently. When maintenance is necessary, it is performed during periods of low demand and announced in advance on the Volgistics site.

You can learn more about Volgistics reliability in the Volgistics Service Agreement PDF file.

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## **How secure is Volgistics?**

Help topic 1014

Added or revised 04-21-2015

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Security and privacy of customer data is Volgistics' number one priority. Volgistics incorporates the same mission-critical security and privacy protections as those used by online banking services.

Volgistics uses a layered approach to security, and follows industry standard *best practices* at each level. Security begins with the *physical security* of the Volgistics data center, continues to *network security*, and ends with the protection of the *data* itself.

### **Physical security**

The Volgistics system is operated exclusively by Volgistics from a secure data center. The data center is located in the central United States. It provides the physical environment necessary to keep data and equipment secure 24 hours a day, including 24x7 secured access, security alarms, video surveillance, smoke and fire detection, and fire suppression systems. Authorized Volgistics employees are the only people who have access to the Volgistics system.

### **Network security**

Volgistics strictly safeguards customer data and transactions while they are in transit. The Volgistics network uses 256-bit secured-socket layer (SSL) data encryption. This is the same level of encryption used in online banking.

With SSL, all of your volunteer information is encrypted - or scrambled - as it travels back and forth between your computer and the Volgistics datacenter. Even if someone were able to intercept the information as it traveled over the Internet, it would be meaningless to them in this encrypted form. This is a higher level of security than that used internally on most corporate networks.

Volgistics' SSL-based network security is supplemented by a DigiCert Server ID, also known as a "digital certificate." The certificate verifies that all data claimed to have originated from the Volgistics web site did, in fact, originate from that web site, and that it has not been tampered with along the way. A digital certificate is the industry standard, and can be neither forged nor decoded with current or foreseeable technology.

The Volgistics data center also uses Cisco secure firewalls to prevent unauthorized access to Volgistics applications and data.

### **Data security**

Designed expressly for secure Internet operations, the Volgistics database itself includes advanced security, data integrity, and encryption protections. Volgistics data never leaves the control of Volgistics. Backup data is encrypted for additional protection.

Data stored in Volgistics is the sole property of Volgistics customers. Customers define and control their own login credentials. Only the people you authorize have access to your data. Once you authorize a user to access the Volgistics system, user-specific permissions that you set determine which functions and data are available to them. Volgistics uses strict session management. Sessions expire automatically after a period of inactivity.

Volgistics also protects your data with a strict privacy policy, available in [Help Topic 1015 \[pg:0182\]](#).

You can learn more about Volgistics security in the Volgistics Service Agreement PDF file.

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## **The Volgistics Privacy Policy**

Help topic 1015

Added or revised 06-21-2013

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Your privacy is very important to us, and we carefully protect your information and the privacy of the information you manage through Volgistics. This privacy policy explains what information we collect, how we use it, and the measures we take to protect it. If, after reviewing this policy, you have additional questions, please contact the Volgistics team through your [Volgistics Mailbox \[pg:1902\]](#), or select Support from the menu at [www.volgistics.com](http://www.volgistics.com).

### **What information we collect and how we use it**

In order to use Volgistics we ask you to provide your name, title, phone number, email address, and the name and address of your organization. We collect this information when you initially sign-up for a [free Volgistics trial account \[pg:0224\]](#). If you choose to turn your trial account into a paid Volgistics account, we also ask for the email address of the person responsible for your account's payment arrangements, your payment information, and your billing address.

We use this information as the basis for identifying you as the owner of the data you track in the system. We use your payment information to process your payment of service fees, and we use your billing contact's email address if we need assistance processing a payment. We may use your email address, or the email address of others you setup as [Volgistics Administrators \[pg:0052\]](#) to communicate with you about the status of your Volgistics account.

We do not sell, rent, or otherwise provide information about you or your organization to others for any reason. This includes personal information (such as your name, address, or email address), and the name and address of your organization.

From time to time we may release collective statistics about the Volgistics system, such as the average number of volunteers organizations track, or the percentage of Volgistics customers who fall into general organization classifications. These aggregate statistics never reveal information identifiable as that of an individual customer.

### **Who can access your information**

Only people you setup as [System Operators \[pg:0065\]](#) in your Volgistics account, and who you give access to [Setup \[pg:0887\]](#) can view or change your organization information. You view or change your organization information under "Account Management" in the Setup area.

Once you initially enter payment information for your account, no one can see your complete credit card or bank account number in Volgistics. Volgistics displays only the last four digits of these numbers, and only where it is necessary for you to identify the card or account used to pay for your service.

### **What happens to your information if you close your account**

We will continue to protect your information under the terms of this Privacy Policy even if you close your Volgistics account. If you close your Volgistics account we delete your account information from our system within 30 days.

### **About the information you store in your Volgistics database**

Your database includes all of the volunteer, coordinator, and assignment information you enter in your account, as well as all records related to those, including service records, history records, and contact records.

The information you store in your database belongs solely to you, and Volgistics carefully safeguards the privacy and security of this data. Volgistics never discloses the content of your database to anyone. Volgistics uses procedural and technical safeguards to protect your database against loss or theft, as well as unauthorized access. These safeguards include encryption, firewalls and Secure Socket Layers (SSL). All data is stored in a secure data center wholly owned and operated by Volgistics. Volgistics uses many different security techniques to protect your data from unauthorized access by both internal and external users. However, it must be recognized that "perfect security" does not exist on the Internet.

### **Who can access the information you store in your Volgistics database**

Access to the information you store in your database is carefully controlled through a three part credentialing system. This includes an account number, login name, and password. People you allow to access the system by giving them credentials are known as [System Operators \[pg:0065\]](#). Only people you authorize as System Operators have online access to your database.

The person who initially signs-up for your trial account chooses a login name and password at the time they sign-up, becoming your organization's first System Operator. Thereafter, that individual may create additional System Operators for your account, and authorize others to use the system by providing them with System Operator credentials. You can see who the current System Operators are for your account at any time under "System Operators" in the [Setup \[pg:0887\]](#) area.

Only System Operators in your organization you designate as [Volgistics Administrators \[pg:0052\]](#) can create System Operator credentials for your account. Volgistics employees cannot access your account passwords, nor change or create new passwords for your account.

You are responsible for all actions taken with your Volgistics System Operator credentials. Give System Operator credentials only to those you wish to have access to your database. If you know or suspect that a System Operator's credentials have been compromised, you should disable that operator's access to the system immediately under "System Operators" in the Setup area. [Help topic 1020 \[pg:0024\]](#) explains how to do this under the "Prevent Access for the System Operator" heading.

### **What can Volgistics access?**

The content of your database is not generally available to Volgistics employees. In the course of managing database and file system components, authorized Volgistics employees may occasionally work with raw data file content. In these cases, information is generally seen only in an aggregate form.



Volgistics employees may access the [Event Log \[pg:0028\]](#) for your account for the purpose of answering your support inquiries or assisting you with system operation issues. This log contains a record of system setting changes, system errors, and related system events, but does not provide access to your Volgistics database. You can view the Event Log for your account under "Account management" in the [Setup \[pg:0887\]](#) area.

All Volgistics staff work under strict confidentiality agreements and this Privacy Policy.

### **Changes to this policy**

We may amend this Privacy Policy from time to time by posting the amended terms on the Volgistics web site, and posting a notice of the change on the Welcome screen you view when you access your account. All amended terms shall automatically be effective once posted.

### **Printable Version**

The Volgistics Privacy Policy is available in a printable form in the Volgistics Service Agreement PDF file.

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## **Sending and Receiving Help Inquiries**

Help topic 1027

Added or revised 06-10-2016

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If you have a trial or a paid Volgistics account, we recommend that all help inquiries be sent from the *Help E-mail* tab of your Volgistics Mailbox instead of by selecting Support from the menu at the top of the page at [www.volgistics.com](http://www.volgistics.com).

There are four reasons we recommend this.

- The questions and responses will all be stored in one place so you have a quick, handy reference if you have the same question again or you are training a new [System Operator \[pg:0065\]](#).
- The Volgistics Support Team can respond to your inquiries quicker and more accurately because the inquiries you submit will be linked to your Volgistics account.
- You can include additional resources such as a report you have a question about or a screenshot of what you are seeing.
- You can create follow-ups so that all the inquiries in a chain are connected. This can be helpful to the Support Team because we will be able to see the previous inquiry so information will not need to be repeated.

Other people from your organization who have access to your Volgistics account can see your inquiries and the responses to them in case they have a similar question. However, no one from outside of your organization, such as volunteers and people in other organizations, can see them.

The Volgistics Support Team is available to answer your questions weekdays from 8 am to 9 pm Eastern. On Saturday, we are available from 11 am to 4 pm. Additionally, a support team member will log in at least once Saturday evening and three times throughout the day on Sunday. The typical response time during support hours is between 10 and 15 minutes. When you submit your question after support hours, the team will answer it the next time support resumes.

You can go directly to a section of this help topic by clicking a link in the *Contents* box below.

## Contents

Send a New Help Inquiry  
Send a New Help Inquiry with a Report Attached  
Send a New Help Inquiry with a Screenshot or Other File Attached  
Send a Follow-up Help Inquiry  
Receive Responses to Help Inquires  
[How to Make a Screenshot](#)  
**Send a New Help Inquiry**

Take the following steps to get to the New Help Inquiry window:

1. Choose Mailbox from the [menu \[pg:0215\]](#).
2. Click on the *Help E-mail* tab.
3. Click the **Send an inquiry** button.

Use the New Help Inquiry window fields to prepare your help inquiry.

### Posted By

The name associated with the login name you used to access the Volgistics system appears here.

### This is about

Choose the entry that best describes the kind of inquiry you are making.

### Subject

Enter a few words to summarize your inquiry (for example "Printing mailing labels," or "Renewing my account"). Please note that this field is limited to 40 characters so any information beyond this limit will not appear on your inquiry.

### Message

Enter your question(s) here.

If you are writing about an error message you received, be sure to include the exact wording of the message and the error number (if one was provided).

### Send or Cancel

Click **Send** to send your inquiry, or **Cancel** to continue without saving or posting an inquiry.

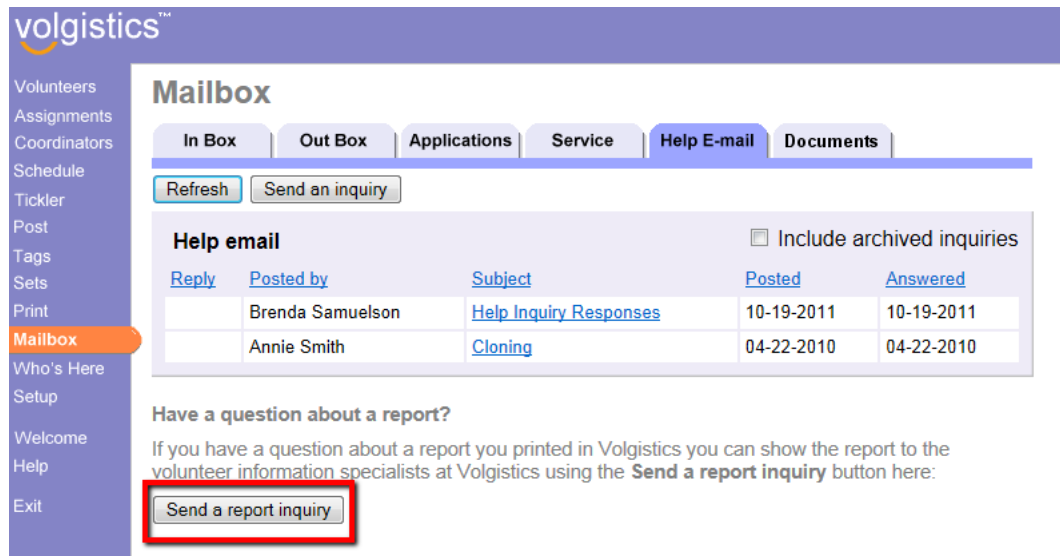
## **Send a New Help Inquiry with a Report Attached**

If your inquiry is about a [stock \[pg:0595\]](#) or [custom \[pg:0467\]](#) report you have created, it is often useful to send a copy of the report to the team so they can refer to it when answering your question.

*In order for us to see the report you must keep it on the [In Box \[pg:1917\]](#) of your Volgistics mailbox. If you delete the report, we will not be able to see it.*

Here are the steps to send a report along with your help inquiry:

1. Choose Mailbox from the [menu \[pg:0215\]](#).
2. Click on the *Help E-mail* tab.
3. Click the **Send a report inquiry** button at the bottom of the page.



The screenshot shows the Volgistics Mailbox interface. The 'Help E-mail' tab is selected. Below the tabs, there are 'Refresh' and 'Send an inquiry' buttons. A table titled 'Help email' lists two entries:

<a href="#">Reply</a>	<a href="#">Posted by</a>	<a href="#">Subject</a>	<a href="#">Posted</a>	<a href="#">Answered</a>
	Brenda Samuelson	<a href="#">Help Inquiry Responses</a>	10-19-2011	10-19-2011
	Annie Smith	<a href="#">Cloning</a>	04-22-2010	04-22-2010

Below the table, there is a section titled 'Have a question about a report?' with a paragraph of text and a 'Send a report inquiry' button highlighted with a red box.

4. Select the report your question is about from the list. If the report does not appear on the list, click the link behind "If your inquiry is not about a specific report."

Use the window fields to prepare your help inquiry. If you need assistance for what a field is used for, you can find details in the Send a New Help Inquiry section above.

### Send a New Help Inquiry with a Screenshot or Other File Attached

If your inquiry is about a problem you're seeing, and you feel it will be helpful for us to see your screen, you can send a screenshot showing what you see. If you need help making a screenshot, see the How to Make a Screenshot section below.

You are not limited to just sending screenshots, any file you feel will be helpful for us to see can be included as long as it is in one of the accepted formats: .doc, .docx, .gif, .jpg, .pdf, .png, .xls, or .xlsx. The file that you send needs to be stored locally on your computer or network, or on a storage device such as a flash drive.

To send us a file to view, follow the steps in the Send a New Help Inquiry section above. Before you click the **Send** button, click the **Choose file** or **Browse** button at the bottom:

Posted by: Alexandra Call

This is about:

Subject:

Message:

Upload option for attachments:  No file chosen  
Acceptable file types: XLS, XLSX, DOC, DOCX, PDF, PNG, GIF, JPG

[Help](#)

Locate the file you'd like to send, click on it, and then click the **Open** button.

Click the **Send** button to finish sending us the inquiry.

### Send a Follow-up Help Inquiry

When you have an additional question, or more information, about a help inquiry that was sent previously you should link the inquiries together. This will help the Volgistics Support Team know your inquiry is related to a previous question and save you from needing to re-enter information. You can find more information on viewing responses to your inquiries in the Receive Responses to Help Inquires section below.

Take the following steps to link a follow-up inquiry to a previous inquiry:

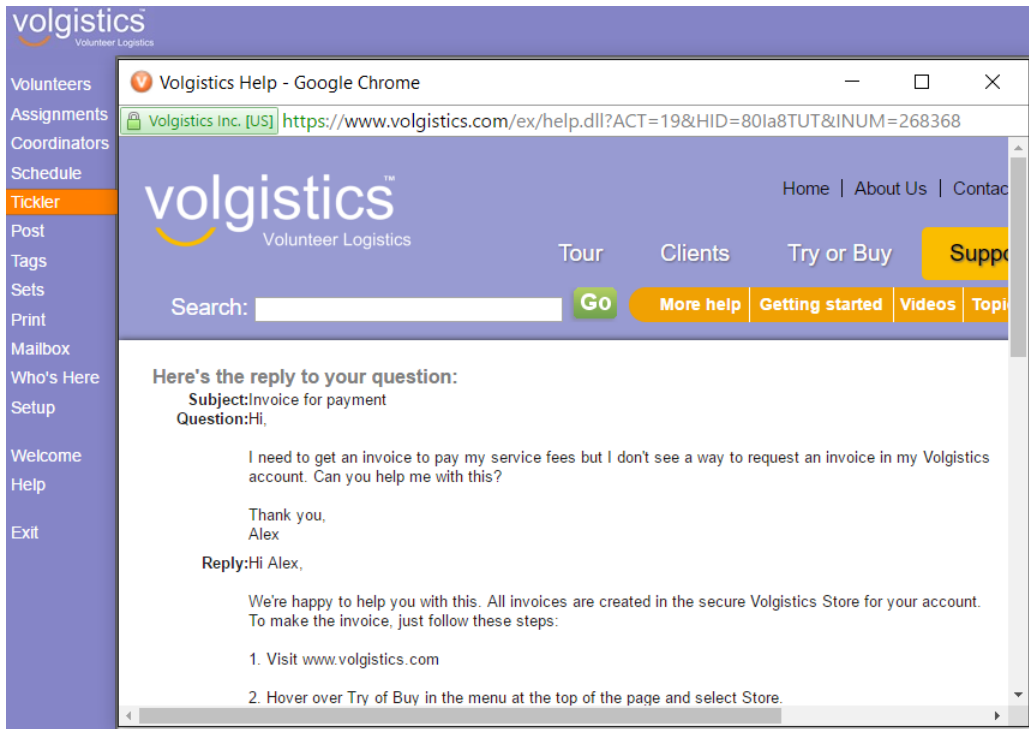
1. Choose Mailbox from the [menu \[pg:0215\]](#).
2. Click on the *Help E-mail* tab.
3. Click the link to the help inquiry in the Subject column.
4. Click the **Post a follow-up** button.

The screenshot shows the Volgistics Mailbox interface. On the left is a vertical navigation menu with items: Volunteers, Assignments, Coordinators, Schedule, Tickler, Post, Tags, Sets, Print, Mailbox (highlighted in orange), Who's Here, Setup, Welcome, Help, and Exit. The main area is titled 'Mailbox' and has tabs for 'In Box', 'Out Box', 'Applications', 'Service', 'Help E-mail', and 'Documents'. The 'Help E-mail' tab is selected. Below the tabs is a 'Close' button. The main content area displays a 'Help Inquiry' message. The message text is: 'Posted by: Brenda Samuelson, 10-19-2011 at 2:04 pm. Subject: Help Inquiry Responses. Message: Where will answered help responses appear? Will I get a message on my Welcome page? Reply: Hi Brenda, Our responses to your help inquiries should appear on the Help E-mail tab of your Mailbox. We can also send a copy of the message to the email address you use to access Volgistics, as we did with this one. Please let us know if you have any other questions. Thank you, The Volgistics Team. 10-19-2011 at 2:06 pm'. At the bottom left of the message area is a 'Printable View' link. At the bottom right are two buttons: 'Post a follow-up' (highlighted with a red box) and 'Archive'. A 'Close' button is also present at the bottom left of the main content area.

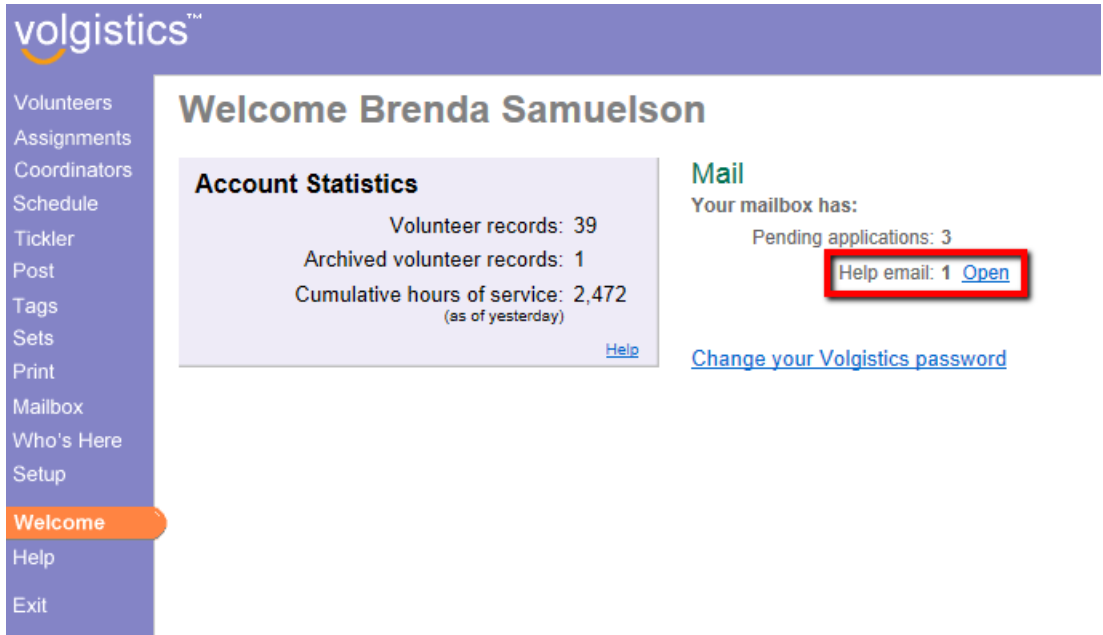
Use the window fields to prepare your help inquiry. If you need assistance for what a field is used for, you can find details in the Send a New Help Inquiry section above.

### Receive Responses to Help Inquiries

If you are working in your Volgistics account when a response is sent, and you are the operator who sent the inquiry, the answer will appear in a separate browser window when you select a new item from the [menu \[pg:0215\]](#).



If you are not working in your Volgistics account when a response is sent, we post a notice and link on your Volgistics Welcome page to let you know. Click the Open link to be taken to the *Help E-mail* tab of your Volgistics Mailbox.



All help responses are collected on the *Help E-mail* of your Volgistics mailbox also. You can go there to read new responses, or review old responses. To do this:

1. Choose Mailbox from the [menu \[pg:0215\]](#).

2. Click on the *Help E-mail* tab.
3. Click the link to the help inquiry in the Subject column.

Unread help responses will appear in bold print and show as **New** in the Reply column.

The screenshot shows the Volgistics Mailbox interface. The top navigation bar includes tabs for In Box, Out Box, Applications, Service, Help E-mail, and Documents. The Help E-mail tab is selected. Below the tabs are buttons for Refresh and Send an inquiry. The main content area is titled 'Help email' and includes a checkbox for 'Include archived inquiries'. A table lists help emails with columns for Reply, Posted by, Subject, Posted, and Answered. The first row is highlighted with a red box and has a 'New' indicator in the Reply column. Below the table is a section titled 'Have a question about a report?' with a 'Send a report inquiry' button.

Reply	Posted by	Subject	Posted	Answered
<b>New</b>	Brenda Samuelson	<a href="#">Inactive Volunteers</a>	10-21-2011	10-21-2011
	Brenda Samuelson	<a href="#">Assignments</a>	10-21-2011	10-21-2011
	Brenda Samuelson	<a href="#">Help Inquiry Responses</a>	10-21-2011	10-21-2011
	Brenda Samuelson	<a href="#">Help Inquiry Responses</a>	10-19-2011	10-19-2011
	Annie Smith	<a href="#">Cloning</a>	04-22-2010	04-22-2010

If you need to clean-up the list of inquiries and responses, you can archive items that are no longer needed. [Help topic 2231 \[pg:0066\]](#) explains how to do this.

## How to Make a Screenshot

Taking a screenshot is something that is done outside of the Volgistics system so how to do it will vary depending on what resources you have available. Below are some outside resources that may help you, but if you need additional assistance you will need to find this on your own. For instance, by doing an Internet search or asking a colleague.

If you have Microsoft Windows, the fastest way to capture a screenshot is with the Snipping Tool. You can find information on this feature on Microsoft's website [here](#).

If you do not have Windows, or cannot use the Snipping Tool, there is an additional resource [here](#). Just click on the tab at the top to go to the instructions for your operating system.

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## Using Volgistics for Special Events

Help topic 1155

Added or revised 04-20-2016

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Many Volgistics customers intend to use the system on an ongoing basis, for Assignments that occur daily, weekly, monthly or with another recurring frequency. Still other customers choose to use Volgistics to aid in volunteer recruitment, tracking and coordination for special events. This help topic provides guidance for special event volunteer managers to help them consider in advance how Volgistics will work best for their event.

### IMPORTANT!

*If you're planning to use Volgistics on an ongoing basis, we recommend proceeding to the next help topic and skipping this help topic.*

The other help topics have more information on how to setup Volgistics for maximum benefit if you will have an ongoing account. To skip this help topic and continue on, click the

**Next** arrow at the top or bottom of the help topic. You can also go to [help topic 2323 \[pg:2020\]](#).

If you are using Volgistics for a special event, this help topic may complete your account setup sufficiently. In this case, you may not need to continue with the setup help topics. Although you may want to review them after you have things setup to see if you might benefit from using any of the other setup features and options. To view the other setup help topics, click the

**Next** arrow at the top or bottom of the help topic. To skip to the help topics on using Volgistics, go to [help topic 2023 \[pg:1982\]](#).

To begin, there are a couple of important things to remember when planning your special event with Volgistics:

1. **Start early.** Volgistics can be used to its greatest potential when you devote sufficient time to organizing and planning the system's role in your event *before* actually implementing the system. You might even choose to do a trial run of a "test" event with Volgistics before you plan to use the system for an actual event.
2. **Use only what you need.** While Volgistics contains an abundance of features, it is unlikely that you will need to use every single one, particularly when running special events. Do not feel as though you must utilize every field or feature as you prepare for your event.

### How to get started with Volgistics for a special event

When getting started with Volgistics for a one-time event, there are several steps you should take:

1. Create Assignments
2. Create schedule openings
3. Add volunteer records
4. Assign volunteers to Assignments
5. Schedule volunteers



## 1. Create Assignments

The first thing to consider is what you will need volunteers to do, and where they will need to do it. At this point, knowing exactly which dates, times, or number of volunteers you will need in each job is not necessary. You should prepare a list of the tasks volunteers will complete for your event, organize this information into the [Site/Place/Assignment schema \[pg:0096\]](#) of Volgistics and then [add the Assignments \[pg:0106\]](#) to your database.

## 2. Create schedule openings

Once you have created the Assignments volunteers will serve in, think about

*when*

service in those Assignments will be performed. If you can come up with the shifts (called schedule openings in Volgistics) when your Assignments will require volunteer service, it is best to do so as early as possible. Follow the procedure to [create a schedule opening \[pg:0776\]](#) for each shift you will need in each of your Assignments over the period of your event.

## 3. Add volunteer records

Now that you know which volunteer Assignments your special event will include and when volunteers are needed to serve in those Assignments, it is time to add volunteer records to the system. Volunteer records can get into Volgistics [by manual data entry \[pg:1877\]](#), through [online volunteer application forms \[pg:0413\]](#) submitted by prospective volunteers, or by data conversion from another database. Adding volunteer records manually is not difficult, but online application forms can make the process of adding volunteer records even easier for Volgistics system operators. [Help topic 1053 \[pg:1334\]](#) provides detailed instructions on how to setup an online application form in Volgistics.

For special event volunteers in particular, it is a good idea to include [schedule fields \[pg:1343\]](#) on application forms so that applicants can indicate their schedule preferences. [Using schedule preferences \[pg:0773\]](#) expedites the process of getting new volunteers onto your special event schedule by allowing applicants to choose the specific shifts they would like to serve in at the same time they apply. Collecting schedule preferences on the application form will not cause applicants to automatically be scheduled for their preferred shifts; the system operators can view schedule preferences and retain control of actually scheduling the volunteers.

Note that if you have not yet created schedule openings, there will not be any openings for volunteers to fill, so they will not be able to indicate schedule preferences on the application. In this case applicants can indicate Assignment preferences if you have customized a [preference field \[pg:1011\]](#) for this purpose.

With the schedule preference and Assignment preference approaches there is not a way for an applicant to later come back to your website and make changes to their preferences. If they need to make a change later they would have to contact you with their change, and you would make the adjustment from within Volgistics. To involve volunteers with scheduling *after* their application has been received, you would use [VicNet \[pg:1724\]](#), as explained later in this help topic. When volunteers are allowed to self-schedule with VicNet, their selections are added directly to the actual schedule without requiring system operator approval.

## 4. Assign volunteers to Assignments

The next step is to assign volunteers to the Assignment(s) in which they will serve. You will need to [add a volunteer's Assignment and role \[pg:0103\]](#) to their record. In addition to adding Assignments to individual volunteer records, you can use the [Tags \[pg:1999\]](#) feature to add an Assignment to multiple records at once.

## 5. Schedule volunteers

If you have used the schedule preferences feature described in step 3 above, scheduling volunteers is easy. Simply locate the raised hand icon(s) indicating schedule preferences and click the "Add to schedule" link, as described [here \[pg:0773\]](#).

If you are not using schedule preferences but you are ready to fill a schedule opening with a particular volunteer, you can do so like this:

1. Choose Assignments from the menu.
2. Click on the name of the Assignment in which you want to schedule a volunteer.
3. Click on the Assignment's Schedule tab.
4. Choose the date on which you want to add a volunteer to the schedule, and click the **Go** button.
5. Openings are listed at the top of the page. Click the orange "Fill" link.
6. In the "Fill an opening" box, select the volunteer's name from the drop down list and click **Save**.

The volunteer is now scheduled to serve in that Assignment during the time specified by the opening.

If you want volunteers to [schedule themselves \[pg:1494\]](#), the optional [VicNet \[pg:1724\]](#) module permits them to do so. In order for volunteers to log into VicNet, they will need a login name and [password \[pg:1699\]](#). Their email address becomes their VicNet login name.

If you're using an [online application form \[pg:0413\]](#), you can add the password field to the application form and ask the applicant to choose their own password. This saves you from having to send out password links by email, and the applicant is more likely to remember their password because they selected it themselves.

Alternatively, you can send volunteers a link they can use to establish their permanent password. [Help topic 2233 \[pg:2013\]](#) shows how to do this for a group of volunteers at once. If you decide to use VicNet for your special event, there are several ways to [introduce volunteers to VicNet \[pg:1925\]](#).

#### **Related help**

[Help Topic 1206 \[pg:0707\]](#) - Can I make my account for an annual special event dormant?

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## **Assigning Volunteers to an Assignment**

Help topic 1185

Added or revised 10-03-2016

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Once you have [created an Assignment record \[pg:0106\]](#) for the job or task the volunteer will be performing, volunteers can be assigned to that Assignment. Volgistics uses

#### *Roles*

to show a volunteer's relationship to an Assignment so assigning a volunteer to an Assignment is really just giving the volunteer a Role of

#### *Assigned*

in that Assignment. Organizations often choose to assign a volunteer to an Assignment when the volunteer has been placed in that Assignment; is qualified to serve in the Assignment; and/or will be scheduled to perform service in that Assignment in the future. Other default Roles in the system include *Preference*, *Trainee*, *Former*, and *Substitute*. You can learn more about how each Role is generally used in [help topic 2173 \[pg:0103\]](#).

Keep in mind that a volunteer can be said to "have" an Assignment without being on the schedule for that Assignment. Giving a volunteer a Role in an Assignment is not the same as [scheduling \[pg:0746\]](#) her in an Assignment. When a volunteer is scheduled in an Assignment, the schedule entry is listed on the Schedule tab of the volunteer's record. When a volunteer has a Role in an Assignment (such as Assigned), the Assignment appears on the volunteer's [Service tab \[pg:0138\]](#), and it can also appear in other areas such as on the volunteer's [Home tab \[pg:1486\]](#) in [VicNet \[pg:1724\]](#).

There are three ways that volunteers can be given a Role of Assigned in an Assignment.

- A manual entry by a [System Operator \[pg:0065\]](#) on an individual volunteer's Service tab.
- A System Operator using the [Tags \[pg:1529\]](#) feature to give the Role to multiple volunteers at once.
- The Automatic Assignment Tracking feature

### Add an Assignment on the Volunteer's Service Tab

To manually enter an Assignment for a volunteer, along with their Role in the Assignment:

1. Choose Volunteers from the [menu \[pg:0215\]](#).
2. Locate the volunteer for whom you want to record an Assignment. [Help topic 2023 \[pg:1982\]](#) shows the different ways you can do this.
3. Click the *Service* tab.
4. Use the Add box that appears inside the Assignments box to select the Assignment and Role (see the picture below). The *From* and *To* date fields are optional. If you want to keep a record of when a volunteer was assigned to an Assignment, enter the appropriate date in the *From* field. If you do not see the *From* or *To* fields, see the call out box below.
5. Click the **Save** button to save the volunteer's Role in the Assignment.

This is an example of the Assignment box on the Service tab for a volunteer:

**Assignments** i

Assignment	Role	From	To	Coordinator		
Advisory Council [Main Hospital\Administration]	Former	05-10-2014	07-13-2016	Kevin Atkins	<a href="#">Edit</a>	<a href="#">Delete</a>
Greeters [Main Hospital\Patient Escorts]	Assigned	10-31-2012		Arnold Cabrera Georgette Lopez	<a href="#">Edit</a>	<a href="#">Delete</a>
Greeters [Main Hospital\Patient Escorts]	Substitute	11-07-2012		Arnold Cabrera Georgette Lopez	<a href="#">Edit</a>	<a href="#">Delete</a>

**Add**

Assignment:

Role:

From:   To:

Looking at the *Role* column in this example we can see that the volunteer has an *Assigned* Role in the *Greeters* Assignment. She also has a Role of *Substitute* in the same Assignment, which generally means she's available to fill in when needed. As you can see, a volunteer can have more than one Role in the same Assignment.

We can also see that the volunteer has a Role of *Former* in the *Advisory Council* Assignment. The *Former* Role is generally used to show that a volunteer used to serve in the Assignment. The *To* and *From* dates for the Role indicate she had a Role in the Assignment from May 2014 to July 2016.

## PLEASE NOTE!

The

*To*

and

*From*

dates mentioned above are only indicators of when the Role was given in the Assignment. These are not the same as [service entry \[pg:1581\]](#) dates or [schedule entry \[pg:0746\]](#) dates.

If you have enabled the [volunteer and assignment matching \[pg:0899\]](#) features, you'll also see an **Include** matched assignments button. If you click this button, it will help you find other assignments that the volunteer is qualified to serve in.

## Adding Fields to the Assignments Box

If your Assignments box doesn't have all the fields that appear in the example, you can add them by:

1. Select [Setup \[pg:0887\]](#) from the menu.
2. Expand the *Field options* link.
3. Select *Service tab*.
4. Under the *Assignment box* heading, select the field you want to have shown.
5. Select *No* from the *Hidden* dropdown list.
6. Be sure the *Include as a grid column* box is checked.
7. Click the **Save** button.

## Add an Assignment for Multiple Volunteers with the Tags Feature

You can add a Role in an Assignment to multiple volunteers at once with the [Tags \[pg:1529\]](#) feature. To do this:

1. Select *Tags* from the menu.
2. Click the **Clear all tags** button to make sure no records are currently tagged for your session. If the button is disabled, there are no records currently tagged.

3. Tag the volunteer records that you want to give a Role in the Assignment to. You can find assistance with how to do this in [help topic 2139 \[pg:1538\]](#).
4. Select *Tags* from the menu.
5. Select the Assignment, Role, and other information in the *Add this **Assignment** to all of the tagged volunteer records* section.
6. Click the **Go** button.

After the system completes the command, the Service tab of the tagged records will show the Assignment and Role in the Assignment box.

### **Let the System Automatically Give a Role of Assigned**

To turn on Automatic Assignment Tracking, follow these steps:

1. Select [Setup \[pg:0887\]](#) from the menu.
2. Expand the *Assignment tracking* link.
3. Select *Ground rules*.
4. Under the *Automatic assignments* heading, check the box in front of *Record assignments automatically*.
5. Click the **Save** button.

Volunteers will automatically be given a Role of Assigned in an Assignment when either 1) they have [service \[pg:1581\]](#) recorded in the Assignment, or 2) they are [scheduled \[pg:0746\]](#) for the Assignment. You can learn more about Automatic Assignment Tracking in [help topic 2265 \[pg:0906\]](#).

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## **Should my multi-site organization use a single Volgistics account, or mu**

Help topic 1189

Added or revised 02-14-2012

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Organizations that have multiple sites with volunteer programs at each site (such as health care organizations, and state and national organizations) may be able to use a single Volgistics account which is shared by all of their sites; or they may prefer separate Volgistics accounts for each different location.

This help topic explains the pros and cons of each approach.

From a cost perspective, having separate accounts for each facility would probably be just slightly more expensive than having just one account shared by all sites. So what drives your decision should not be cost alone.

### **With a single account for all sites:**

With a single account you can establish volunteer database standards for all of the sites in your organization from a headquarters location. For instance, a headquarters site (or an overall supervisor) would customize the system and their customizations would apply to every site that uses the shared account. This includes customized field names, dropdown list items, the items that appear in the [Checklists \[pg:0142\]](#), [award items \[pg:1551\]](#), and more.

With a single account you can use the Volgistics [Site Level Access \[pg:0092\]](#) features to create individual [System Operators \[pg:0065\]](#) who only see the volunteers who are associated with their site. These [Site-Level Operators \[pg:1442\]](#) would only see "their" volunteers. Any reports these operators print would only include "their" volunteers' information.

At the same time, System Operators at the headquarters site can see all volunteer records for all sites. They could also produce consolidated reports that include all volunteers or volunteer service information for all sites.

A single account for all sites is probably best if...

- All of the sites have (or should have) the same volunteer Checklists (e.g. Health Screening, Confidentiality Statement, Orientation, etc).
- All of the sites use (or should use) the same award criteria for awards (e.g. 100 hour award, 500 hour award, etc).
- There is one person who has overall management responsibility for all of the volunteer programs at each site (in other words, someone with authority for setting volunteer database standards for all of the sites).
- There is substantial volunteer overlap (many volunteers serve at multiple sites)

#### **With a separate account for each site:**

Each site could tailor the system specifically for their location. For example, individual sites could create custom fields and field dropdown lists that are specific to their site only. Also, each site can setup its own Checklist items and awards lists.

With this approach, there is not a way for a headquarters level operator to view all of the records for all of the sites at the same time. However, a headquarters operator could have a login name for each of the separate site accounts and login to these accounts individually.

There is not a way for a headquarters level operator to produce a single report that would include volunteer names or service statistics for all sites. However, reports with the same formatting could be created by each site and forwarded to headquarters for manual consolidation into a single report).

This approach is probably best if...

- There is some variation in the way each site performs new volunteer processing (e.g. Tb Test, Confidentiality Statement, Orientation, etc).
- There is some variation in the way the sites give volunteer recognition (for example, if different sites use different award criteria).
- There is not one person who has overall management responsibility for all of the volunteer programs at each site.
- There is not much volunteer overlap (volunteers tend to serve at just one site)

Note that you can use the [VicTouch \[pg:1778\]](#) option with either a single account shared by all sites, or with individual accounts for each site.

You can use the price calculator located [here](#) to determine what the rate would be for one account. To do this, add together the total number of volunteers you would likely track and the total number of System Operators you would need then enter this information in the calculator. You can also calculate what the rate would be for separate accounts by entering the information for each site individually. You can then add together the totals you

get to find what it would cost your organization overall.

#### Related help

[Help Topic 1999 \[pg:0709\]](#) - Archived Versus Non-archived Records

[Help Topic 2002 \[pg:0710\]](#) - Volgistics Price List

[Help Topic 2036 \[pg:0093\]](#) - Setup Site Level Access

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## Entering Dates in Date Fields

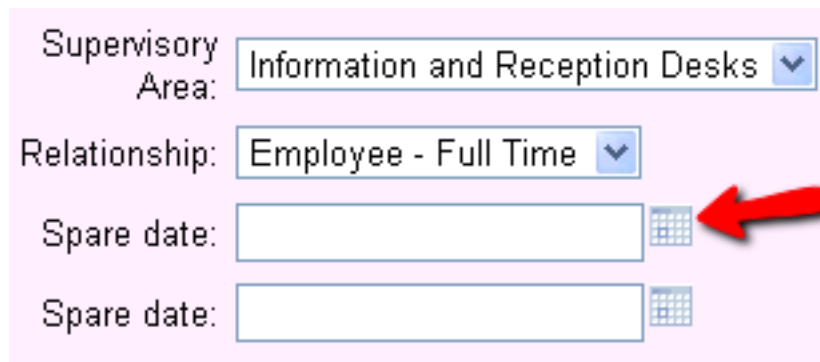
Help topic 1996

Added or revised 10-08-2013

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There are many date fields located in Volgistics. These range from standard fields for [recording service \[pg:1568\]](#) to [spare fields \[pg:0957\]](#) customized with a date format. As with most fields, you can enter a date into date fields using your keyboard. For your convenience, Volgistics also has a JavaScript calendar that can be used to enter dates. This help topic explains how to use this calendar.

When a field is formatted as a date field, the calendar will appear as a small icon somewhere close to the field. It may be to the right as shown in the picture below, or depending on the field's location it may appear underneath the field.



The screenshot shows a form with the following fields:

- Supervisory Area: Information and Reception Desks (dropdown menu)
- Relationship: Employee - Full Time (dropdown menu)
- Spare date: [text input] [calendar icon]
- Spare date: [text input] [calendar icon]

A red arrow points to the calendar icon next to the first Spare date field.

If you do not see this icon by date fields in your account, your JavaScript may be disabled. In this case, see [help topic 2277 \[pg:1617\]](#) for information on how to enable it.

When you click on the icon, the calendar will appear as shown below with the current date indicated by a white background. In the picture, the current date is October 8, 2013.

Relationship:

Spare date:

Spare date:

Home:

Work:

Cell:

<Prev							Today	Next>
October							2013	
Su	Mo	Tu	We	Th	Fr	Sa		
		1	2	3	4	5		
6	7	8	9	10	11	12		
13	14	15	16	17	18	19		
20	21	22	23	24	25	26		
27	28	29	30	31				
Clear							Close	

### Calendar Controls

**Prev** - Click this link to move the calendar view to the previous month.

**Today** - Click this link to return the calendar to the current month. For example, if it is currently October 8, 2013, but the calendar is on January 2014, clicking this link will return the calendar to October 2013 with the eighth indicated with a white background.

**Next** - Click this link to advance the calendar to the next month.

**Month dropdown list** - Click the arrow to the right of the month to see the month dropdown list. Select a month from the list to move the calendar to that month.

**Year dropdown list** - Click the arrow to the right of the year to see the year dropdown list. Select a year from the list to move the calendar to that year.

**Clear** - If the date field has a date entered in it, clicking this link will erase the date entry and close the calendar. If no date is entered, clicking the link will just close the calendar.

**Close** - Clicking this link will close the calendar without making any changes to the field.

### Calendar Hints

The calendar can make many tasks concerning entering dates easier. Here are some examples of the quickest way to perform common tasks.

**Enter current date** - To enter the current date, simply click the calendar icon and then press the *Enter* key on your keyboard. You can optionally click on the current date with your computer's mouse.

**Enter a date a year from the current date** - To enter a date one year from the current date, click the calendar icon, use the year dropdown list to select the next year, and then press the *Enter* key on your keyboard. You can optionally click on the date you need with your computer's mouse instead of pressing the *Enter* key on your keyboard.



**Enter a date a month from the current date** - To enter a date one month from the current date, click the calendar icon, click the *Next* link, and then press the *Enter* key on your keyboard. You can optionally click on the date you need with your computer's mouse instead of pressing the *Enter* key on your keyboard.

If the date you need does not exist in the next month, the closest date available will be used. For example, if it is January 30, 2014 and you take the steps described above, February 28, 2014 will be selected.

**Edit a previous entry** - If the date field already has a date in it and you click the calendar icon, the calendar will show with the date from the field highlighted. If you need to edit this date, simply use the calendar to go to the month and year you need, and click on the date you need with your computer's mouse. The new date will overwrite the previous date in the field. There is not a need to delete the previous date first.

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## Getting Started Interview

Help topic 2060

Added or revised 11-29-2016

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When you first [create a new Volgistics account \[pg:0224\]](#), or after you've [cleared an existing Volgistics account \[pg:0890\]](#), you'll be asked to complete a short "Getting Started Interview" the first time you login. This "Getting Started Interview" helps you get a head-start customizing Volgistics to suit your organization's volunteer tracking needs.

The interview asks you a series of questions about your organization and the kinds of volunteer information you track. Volgistics initially configures the setup options for your account based on your answers to these questions. You can always change these setup options later if you choose to, and your answers to these questions will not limit your access to any Volgistics features.

This help topic explains more about each of the questions you're asked during the interview.

### Kind of volunteer organization

Use the dropdown list to choose the option that best describes your organization. Choose "Other" if none of the options describes your organization well.

#### Kind of volunteer organization

Which of these best describes your volunteer organization?

Other ▼

If you do not see a listing that describes your organization, simply select 'Other' and then click the **Next** button. Your type of organization need not be listed above for you to use Volgistics.

Next

Choose from these options:

- Animal shelter
- Aquarium or zoo
- Church
- College or university
- Community kitchen

Corporate community service  
Disaster relief  
Emergency management  
Environmental organization  
Food bank  
Hospice  
Hospital or medical center  
Historic site  
Library  
Meal delivery  
Multi-service agency  
Museum  
Parks and recreation  
Performing arts  
Political campaign  
Public safety  
Retirement  
School  
Senior Corps project (RSVP, FGP)  
Special event  
Social service agency  
Volunteer center  
Other

Special Options for *Senior Corps project (RSVP, FGP)* Organizations

If you selected *Senior Corps project (RSVP, FGP)* from the dropdown list, the next screen asks you to select the type(s) of Senior Corps projects you sponsor. Select the project(s) that apply to your organization. If you selected a different type of organization, you will not see this screen.

**Senior Corps Project**

Which Senior Corps projects do you sponsor?

Foster Grandparent Program

Retired Senior Volunteer Program

Senior Companions

**Dates and times**

Choose your organization's time zone and date format preference.

## Dates and times

Select your time zone:

(GMT-05:00) Eastern Time (US & Canada) ▼

If your organization operates from locations in more than one time zone, choose the time zone of your headquarters location.

How do you prefer to enter and view dates?

- Month/Day/Year  
 Day/Month/Year

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If your organization operates from locations in more than one time zone, choose the time zone of your headquarters location (you can set time zones for individual [System Operators \[pg:0065\]](#) later).

### How do you prefer to enter and view dates?

Choose "Month/Day/Year" if you prefer to work with dates in a month-day-year format. For example, The 9th day of March 2017 would be entered and displayed as 03/09/2017. This is the date format most commonly used in the United States.

Choose "Day/Month/Year" if you prefer to work with dates in a day-month-year format. For example, the 9th day of March 2017 would be entered and displayed as 09/03/2017. This is the date format most commonly used in the UK and Europe.

### **Fiscal Year**

A *fiscal year* is a regular twelve-month cycle used by an organization for budgeting or fiscal reporting. If your organization follows a fiscal year that is different from the calendar year, choose the month in which your fiscal year begins.

## Fiscal year

When does your organization's fiscal year begin?

January ▼ 1st each year.

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Many organizations have fiscal years that are the same as the calendar year (January 1st through December 31st) but others have fiscal years that differ from the calendar year, such as July 1st through June 30th.

Select January if your fiscal year is the same as the calendar year, or if you're not sure what the fiscal year is. If your organization has multiple fiscal years, choose one of them in this step.

If you track volunteer service, this setting affects the time frame used to calculate year-to-date (YTD) service statistics. YTD service is tracked from the beginning of the fiscal year until the present date instead of from the beginning of the calendar year to the present date when you setup a fiscal year.

### Special Options for *Special event* Organizations

If you selected *Special event* from the dropdown list of organization types, the next screen asks if your event occurs during a certain date range or is year round. If you enter a date range, it will configure the Availability settings you will set up next to be for specific dates instead of just general settings. If you selected an organization type other than *Special event* from the dropdown list of organization types, you will not see this

screen.

**Special event**

Is your event one time or annual; or do you have events year round?

Our event is one time or annual, and our next event starts on

January ▾ 1 ▾ 2020 ▾

and ends on

January ▾ 1 ▾ 2020 ▾

We have events year round.

Back Next

### Availability

If you choose to track volunteer availability in Volgistics (the times individual volunteers are generally available to serve) there are several availability tracking formats. Your selection here will initially configure Volgistics for tracking volunteer availability in the manner that best suits your needs.

**Availability**

How do you want to track volunteer availability?

Do not track volunteer availability at this time

Collect the actual times individual volunteers are available

Collect volunteer availability using these preset intervals

1. Morning

2. Afternoon

3. Evening

4.

5.

6.

7.

8.

Back Next

Choose one of these options:

Do not track volunteer availability at this time

Check this option if you do not need to track volunteer availability right away. If you choose not to track volunteer availability at this time, you can always turn on availability tracking later.

#### Collect the actual times individual volunteers are available

If you choose to track availability by collecting actual times individual volunteers are available, you'll have fields for recording the times each volunteer is available, each day of the week. For example, one volunteer's availability might be 8:15 am through 4:30 pm every Monday and Wednesday, while another's might be from 5:30 pm to 10:00 pm every weekday. This method involves more data entry, but may be more precise. However, if you select actual times you will not be able to query the database to find volunteers with certain selections. This is only available with preset intervals.

#### Collect volunteer availability using these preset intervals

If you choose to track availability using preset intervals, volunteers show their availability by choosing the intervals they're generally available for each day of the week. All volunteers use the same intervals to show their availability. For example, one volunteer's availability might be Mornings and Afternoons every Monday and Friday, while another's might be Evenings every weekday. This method involves less data entry, but may be more general.

If you choose this option, enter up to eight availability intervals. For example, "Morning," "Afternoon," "Evening;" or "8:00 to 10:00 am," "10:00 am to noon," "Noon to 2:00 pm," and so forth.

#### **When do volunteers typically serve?**

Volgistics uses your answers to the questions in this section to initially configure volunteer scheduling features.

## When do volunteers typically serve?

What is the earliest time volunteers are typically scheduled *from*?

6:00 am ▼

What is the latest time volunteers are typically scheduled *until*?

10:00 pm ▼

Which days of the week do volunteers typically serve on?

- Sunday
- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday

Examples:

An organization has 8:00 am to 5:00 pm business hours, with volunteers who serve only during business hours. In this example, enter 8:00 am for the earliest time and 5:00 pm for the latest time.

A performing arts organization has volunteer shifts for both matinee and evening performances. Matinee shifts usually run between 1:00 pm and 7:00 pm. Evening shifts run between 6:00 pm and 11:00 pm. In this example, enter 1:00 pm as the earliest time and 11:00 pm as the latest time.

An organization schedules volunteers around the clock with an 11:00 pm shift change, where an evening shift ends at 11:00 pm, and an overnight shift begins at the same time. In this example, enter 11:00 pm for both the earliest time and the latest time.

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### What is the earliest time volunteers are typically scheduled from?

If volunteers do not usually serve around-the-clock, choose the earliest time of the day volunteers typically serve. If volunteers serve around the clock, choose 12:00 am here.

### What is the latest time volunteers are typically scheduled until?

If volunteers do not usually serve around-the-clock, choose the latest time of the day volunteers typically serve until. If volunteers serve around the clock, choose 12:00 am here.

### Which days of the week do volunteers typically serve on?

If volunteers might serve any day of the week, check every day. If there are any days of the week on which you never schedule volunteers, un-check that day.

### **Volunteer profiles**

Check the kinds of personal information you would like to track for your volunteers. You can add additional fields for other kinds of profile information from the Setup menu once you finish the Getting Started interview.

## Volunteer profiles

Which kinds of demographic information would you like to track on the volunteer profile?

- Date of birth
- Age
- Age range (e.g. under 18, 18 to 65, over 65)
- Gender
- Education
- Major (degree)
- Minor (degree)
- School
- High school
- College
- Insurance company
- Ethnicity
- Marital status
- Spouse's name
- T-Shirt size
- Uniform issued
  - Yes or no
  - Date
- Uniform returned
  - Yes or no
  - Date

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## Volunteer Flags

Volunteer programs often "flag" volunteer records to identify certain facts about the volunteer or their relationship with their organization. Volgistics makes it easy for you to work with volunteer records in groups, based on Flags.

Examples of Flags:

Name	Possible meaning
Newsletter	Whether or not they should receive newsletter mailings
Junior	They're under a certain age
Adult	They're over a certain age
Employee	The volunteer is also an employee of the organization
Donor	They also contribute financially
Day of Caring	They participate in Day of Caring activities
Auxiliary	A member of an auxiliary organization
Deceased	The record is for a volunteer who is now deceased

**Important:** Volgistics includes features to track many standard kinds of information about volunteers. So because they can be tracked better elsewhere, you should **not** create Flags for tracking the following kinds of volunteer information:

- Volunteer assignments, placements, or jobs
- Volunteer status, such as "active" or "inactive"
- Things that have a date completed associated with them

Enter the names of the Flags you want to initially use in your database. You can always add more Flags later. If you want to establish Flags later, just leave this page blank and click the **Next** button.

**Volunteer Flags**

Volunteer programs often 'flag' volunteer records to identify certain facts about the volunteer or their relationship with their organization. Flags are simple 'yes or no' markers on a volunteer's record that show if the volunteer has a certain characteristic or not.

Volgistics makes it easy for you to work with volunteer records in groups, based on their Flags.

Examples of Flags:

Name	Possible meaning
Newsletter	Whether or not they should receive newsletter mailings
Junior	They're under a certain age
Adult	They're over a certain age
Employee	The volunteer is also an employee of the organization
Donor	They also contribute financially
Day of Caring	They participate in Day of Caring activities
Auxiliary	A member of an auxiliary organization
Deceased	The record is for a volunteer who is now deceased

**Important:** do not create Flags for tracking the following kinds of volunteer information (because they're tracked elsewhere):

- Volunteer assignments, placements, or jobs.
- Volunteer status, such as 'active' or 'inactive.'
- Things that have a 'date completed' associated with them.

Enter the names of the Flags you want to use in your database:

1. <input type="text"/>	2. <input type="text"/>
3. <input type="text"/>	4. <input type="text"/>
5. <input type="text"/>	6. <input type="text"/>
7. <input type="text"/>	8. <input type="text"/>
9. <input type="text"/>	10. <input type="text"/>
11. <input type="text"/>	12. <input type="text"/>
13. <input type="text"/>	14. <input type="text"/>
15. <input type="text"/>	16. <input type="text"/>
17. <input type="text"/>	18. <input type="text"/>
19. <input type="text"/>	20. <input type="text"/>

If you don't currently flag volunteers for any reason, click Next to continue to the next step.

### Mutually exclusive volunteer Flags

This option appears if you entered any Flags in response to the previous section.

Some of your volunteer Flags may be *mutually exclusive*. This means that if a volunteer has one exclusive Flag, they cannot also have another of the mutually exclusive Flags at the same time. Another way to look at mutually exclusive Flags is that they define groups of volunteers you don't allow to overlap. *These will become volunteer Types when you complete your interview.*

For example, if one of your flags is *Adult* and another is *Junior*, you may not want the same volunteer to be flagged as both an Adult and a Junior at the same time (a volunteer might move from the Junior classification to the Adult, but they should never be flagged as both at the same time). In this example, Adult and Junior are mutually exclusive flags.



If you have two or more Flags that are mutually exclusive, place a check mark next to them here. Otherwise, click **Next** to continue to the next step.

### "Mutually exclusive" volunteer Flags

Some of your volunteer Flags may be 'mutually exclusive.' This means that if a volunteer has one exclusive Flag, they cannot also have another of the mutually exclusive Flags at the same time. Another way to look at mutually exclusive Flags is that they define groups of volunteers you don't allow to overlap.

For example, if one of your flags is 'Adult' and another is 'Junior' you may not want the same volunteer to be flagged as both an 'Adult' and a 'Junior' at the same time (a volunteer might move from the Junior classification to the Adult, but they should never be flagged both at the same time). In this example 'Adult' and 'Junior' are mutually exclusive flags.

If you have two or more Flags that are mutually exclusive, place a check mark next to them here, otherwise click Next to continue to the next step.

- |                                   |                                    |
|-----------------------------------|------------------------------------|
| <input type="checkbox"/> Adult    | <input type="checkbox"/> Junior    |
| <input type="checkbox"/> Employee | <input type="checkbox"/> Auxiliary |

---

## Adding Volgistics Features to Your Web Site

Help topic 2252

Added or revised 01-09-2015

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Volgistics includes a series of features you can integrate into your own web site. These include:

- [Online volunteer application forms](#)
- Collect volunteer applications online and move applicant data right into Volgistics.[More information](#)  
[\[pg:0413\]](#)

- [VicNet](#)
- Registered volunteers can check their schedules, receive messages, post their service, view their service history, and more from any Internet connected computer. [More information \[pg:1724\]](#)
- [Opportunity directory](#) Volunteers and other visitors can learn more about your volunteer opportunities online. [More information \[pg:0420\]](#)
- [Volunteer newsletters](#) Easily post and update online volunteer newsletters. [More information \[pg:1673\]](#)

These features make it easy for organizations to add powerful database functions to their web sites without any programming or database hosting. You simply add a standard HTML hyperlink for each feature you want to use. You choose which of these features you want to use, and where they appear on your web site.

After adding links to these features, the volunteer office can customize and update their forms from within the Volgistics program without any additional web site modifications. For instance, the volunteer office can add fields to their volunteer application form or post a newsletter without any assistance from a web developer or any changes to the web site's markup. This can save considerable time and expense; and changes appear on the web site as soon as they are made in Volgistics.

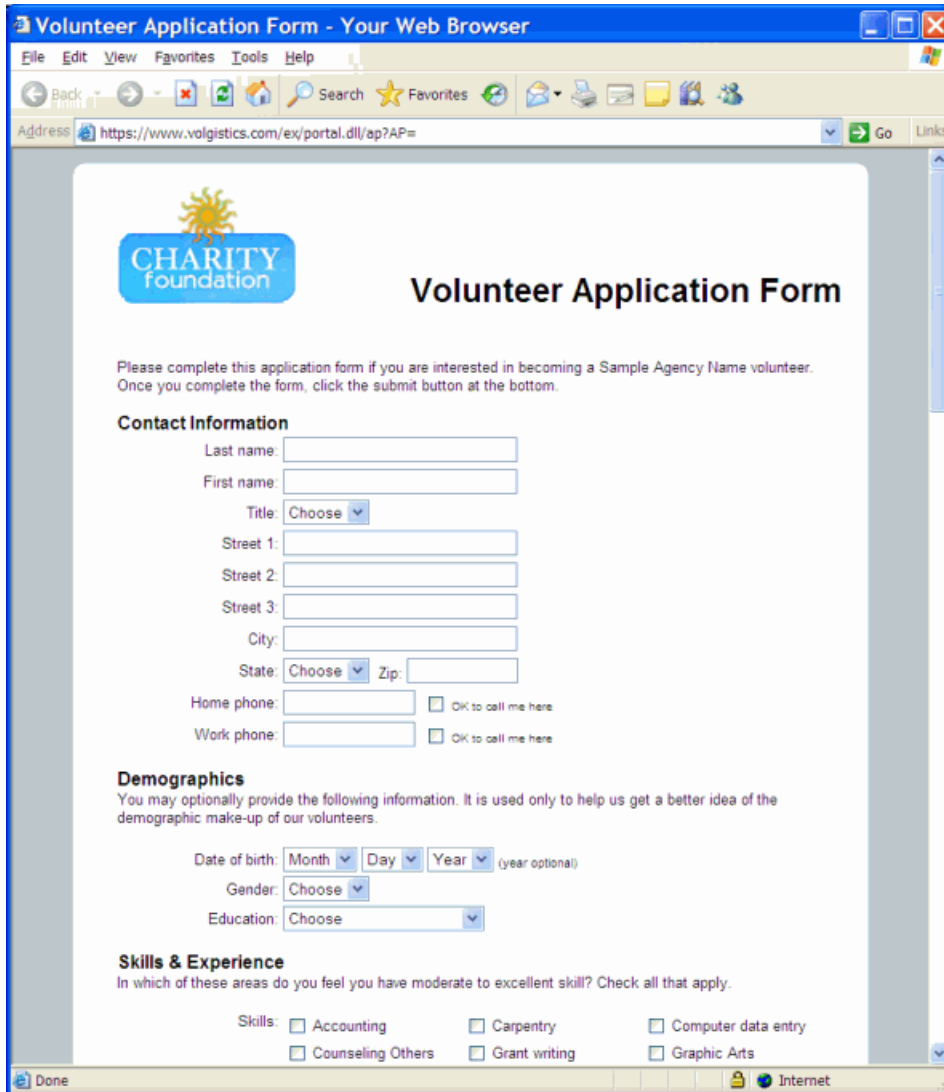
Organizations may optionally 'brand' and customize their linked features to make them appear part of their own web site.

### **Full-page vs. Embedded**

There are two ways to add Volgistics features to your web site, a 'Full-page' method and an 'Embedded' method. Before adding links to your web site, decide which method you want to use.

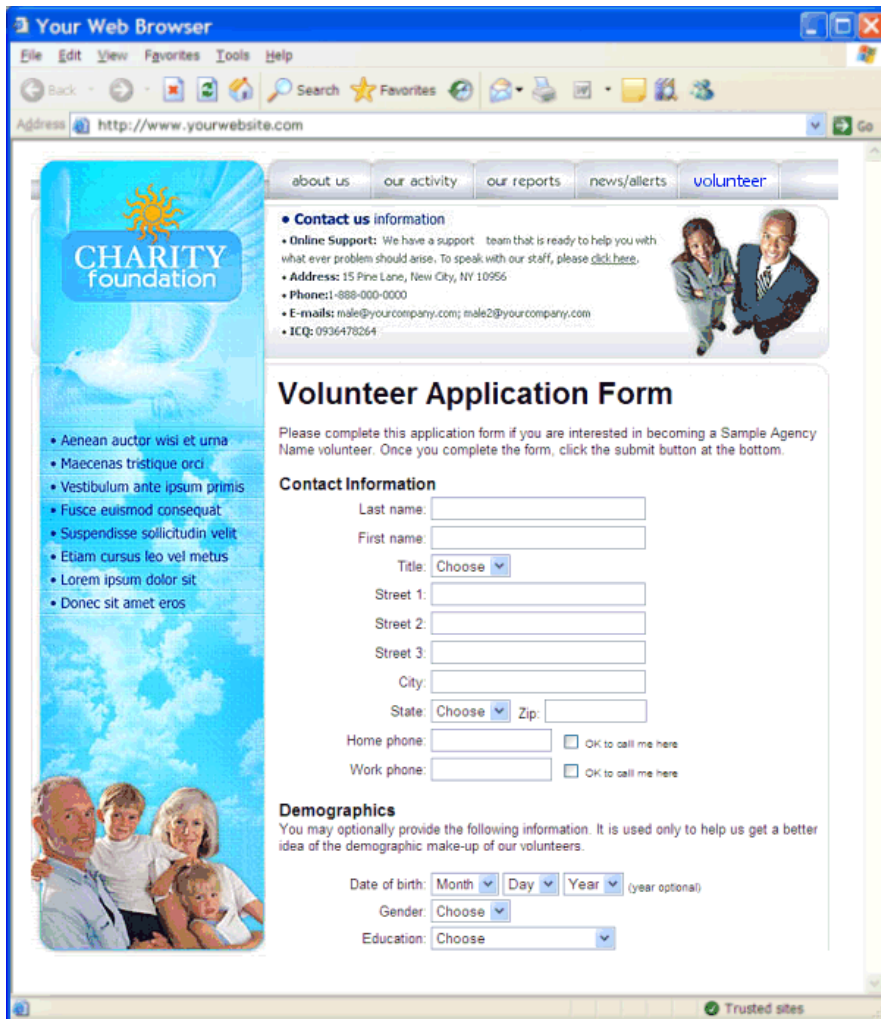
With the full-page method, linked forms open in the entire browser window, as shown below. You can use the full-page method to open forms in the same browser window as your web site; or you can open them in a new browser window on-top of the window that contains your web site. Full-page mode is the easiest way to add these features to your web site; you (or your web developers) simply add a hyperlink to your web page where you want each link to appear. While they are simple to add, forms opened using this method may not appear as tightly integrated with your web site as forms linked using the embedded approach.

This is an example of a volunteer application form linked using the full-page method:



With the embedded approach, you open these features in HTML "frames" or Iframes, with other elements of your own web site displayed around them in other frames, as shown below. This provides greater integration than the full-page method because the visitor will continue to see parts of your web site – such as menus, backgrounds, and borders – while they're using the linked forms. While they can be fully integrated with your site, this approach requires the use of HTML 'frames,' and generally more effort on the part of the person who develops your web site.

This is an example of a volunteer application form linked using the embedded method:



## Customizing links

When you open forms using the full-page mode, Volgistics inserts a solid form background with a white form 'panel.' This panel includes your organization logo (if you've uploaded one) and a form heading. Below the panel you can optionally add a return navigation link, and a link to your organization's privacy policy.

When you open forms using the embedded method, the form includes only a heading (followed by the form). You provide any graphics and navigational links on neighboring HTML frames. You can customize the background color (it's also possible to choose a transparent background if your site has a background image), as well as font characteristics.

You customize these form characteristics on the [Online forms Ground Rules \[pg:1330\]](#) page.

---

## Using the Type and the Flags Fields

Help topic 2263

Added or revised 04-19-2017

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You can jump to different sections of the help topic by selecting the section in the *Contents* box below:

### **Contents**

Overview and field location

How the Type and Flag fields differ

What *not* to track in the Type and Flag fields

Creating custom Types

Creating custom Flags

### **Overview and field location**

The Type and Flag fields are located on the [Core tab \[pg:1868\]](#) in the volunteer record. These fields provide an easy way for you to categorize volunteers according to any general volunteer classifications you use in your organization, such as:

- Regular
- Junior
- Employee
- Adult
- Student
- Board member
- Donor
- Etc.

You can use the Type and Flags fields to find all of the volunteers in a specific category (or categories) to view on the screen; include in a report; send an email to; apply a Checklist item or award to; and more.

In the example pictured below, Harry Bailey's Type is *Adult* and his Flags are *Green Team*, *Regular*, and *Telephone pioneer*.

# Bailey, Harry

Core Profile Service Schedule History Contacts Notes Vic

Save Cancel Archive Delete Combine  Tagged New Previous Next

**Name**

Last name: Bailey Number: 152234  
First name: Harry Status: Active  
Middle name: Title: Mr. Type: Adult  
Nickname: Harry

**Address**

Street 1: 2454 Elm Street Home: (414) 555-1286  Ok to call  
Street 2: Work: (414) 555-7122  Ok to call  
Street 3: Cell:  Ok to call  
City: Bedford Falls Fax:  Ok to call  
State: IN Zip: 12345 Pager:  Ok to call  
Mail:  No postal mail  No email Other:  Ok to call  
Email: hbailey@savingsandloan.com

**Flags**

Green Team Delete Regular Delete  
Telephone Pioneer Delete  
Flag:  Save

**Sites**

## How the Type and Flag fields differ

A volunteer can only have one Type in the Type field. Use the Type field to classify volunteers into categories that never overlap in your organization. For example, *Adult* and *Junior* volunteers. In this example a volunteer would never be an *Adult* and a *Junior* at the same time, therefore you would use the Type field to track these categories rather than the Flag field. Other examples of Types could be *Corporate*, *Student*, or *Employee* as long as a volunteer cannot be one Type and another Type at the same time.

A volunteer can have many Flags in the Flag field. Use the Flag field to classify volunteers into categories where there might be some overlap in your organization. For example *RSVP* and *Auxiliary member*. In this example, a volunteer might be both an *RSVP* volunteer and an *Auxiliary member* at the same time. You can use the Flags field to track these kinds of (potentially) overlapping groups because a single volunteer can have multiple Flags.

If you do not need to classify volunteers, you do not need use either the Type or the Flag fields. You can leave the Type and Flag fields empty until you find a need for them, and then go back and classify volunteers using either field.

## What *not* to track in the Type and Flag fields

The Type and Flag fields allow you to classify volunteers according to a wide variety of categories to suit your needs. However there are several kinds of classifications that it's best to track in other places.

### Assignments

Volgistics includes an entire group of features for tracking volunteer assignments. Assignments are what each volunteer does in your organization. Some volunteer leaders call these *jobs, placements, events* or *service*. These [assignment tracking features \[pg:0096\]](#) are connected to other parts of Volgistics, such as tracking volunteer service. Therefore you should *not* use the Type or Flag fields to show which assignments a volunteer has. Instead, use the assignment tracking features to track their assignments.

## Sites

If your organization has multiple Sites, and you want to use the [Site Level Access \[pg:0092\]](#) features to allow Volgistics [System Operators \[pg:0065\]](#) at individual Sites to access just their Site's volunteers, you should *not* track a volunteer's site(s) in the Type or Flag fields. Instead you should use the Site field on the [Core tab \[pg:1868\]](#) as shown in [help topic 2037 \[pg:0094\]](#).

## **Creating custom Types**

The Type field uses a dropdown list. To add new items to the Type dropdown list:

1. Choose [Setup \[pg:0887\]](#) from the [menu \[pg:0215\]](#).
2. Select *Field Options*.
3. Select *Core tab*.
4. Select Type.
5. Enter the new Type in the *Add a new item:* field and click the **Save** button to the right of the field.
6. Repeat step 5 for any other new Types you need to add.
7. Click the **Save** button at the bottom of the page.

(Note: You can find help with deleting and merging items from the dropdown list in [help topic 2018 \[pg:0963\]](#).)

## **Creating custom Flags**

The Flag field uses a dropdown list. To add new items to the Flag dropdown list:

1. Choose [Setup \[pg:0887\]](#) from the [menu \[pg:0215\]](#).
2. Select *Field Options*.
3. Select *Core tab*.
4. Select Flags.
5. Enter the new Flag in the *Add a new item:* field and click the **Save** button to the right of the field.
6. Repeat step 5 for any other new Flags you need to add.
7. Click the **Save** button at the bottom of the page.

(Note: You can find help with deleting and merging items from the dropdown list in [help topic 2018 \[pg:0963\]](#).)

## Related help

[Help Topic 1220 \[pg:0437\]](#) - Print a Report for a Single Archived Volunteer

[Help Topic 2023 \[pg:1982\]](#) - Finding Volunteer Records

[Help Topic 2140 \[pg:1541\]](#) - How to permanently mark tagged records

[Help Topic 2160 \[pg:1858\]](#) - Update Youth Volunteers upon Adulthood

[Help Topic 2322 \[pg:0471\]](#) - Print a Report for a Single Volunteer

[Help Topic 8015 \[pg:0616\]](#) - Type service details (stock)

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## Volgistics Menu

Help topic 2269

Added or revised 09-23-2016

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The Volgistics menu appears along the left side of the page as soon as you [login \[pg:0220\]](#), and it remains there as long as you're in the system.

You use the menu to move about the system. Simply click any of the menu options to move to that area in the program. To assure you're seeing the latest information in your account, you must use the menu in Volgistics to go from page to page instead of the

**back**

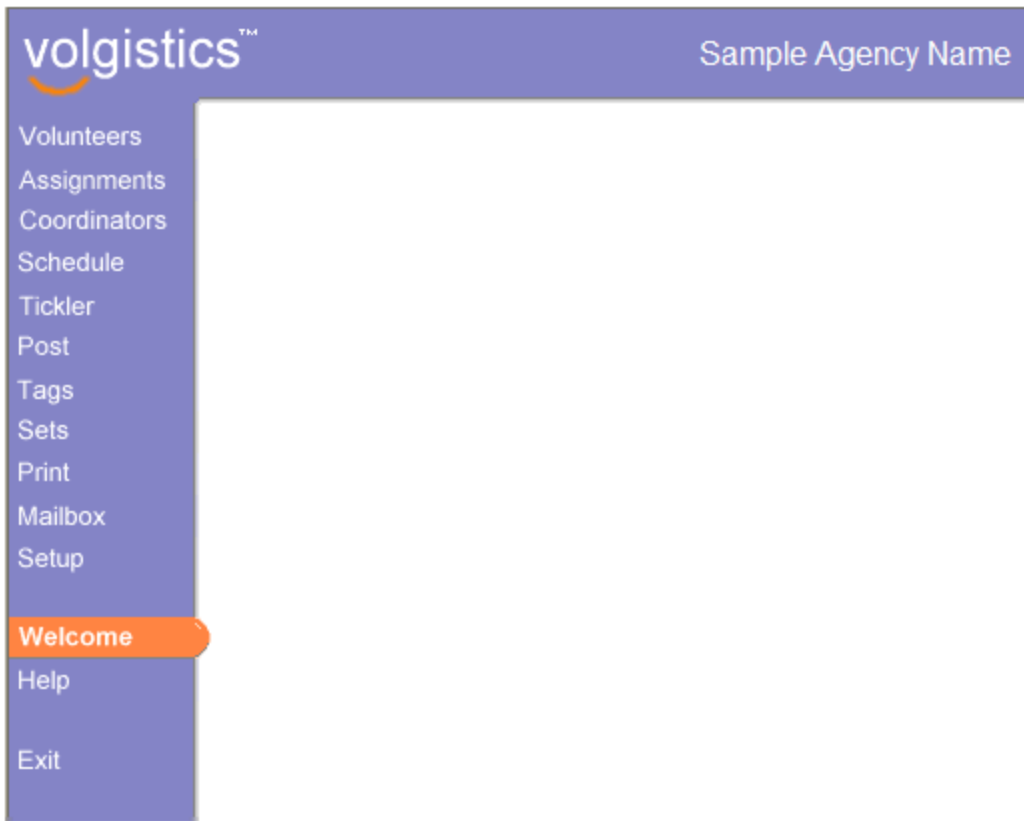
or

**next**

buttons in your web browser. Using the web browser's buttons will result in an error message like the one shown in [Help topic 2075 \[pg:1600\]](#).

The orange bar on the menu shows you which menu option is currently selected.





Your organization's [Volgistics Administrator \[pg:0052\]](#) can tailor the menu so that individual Volgistics users see just the menu items they need to use. For this reason you may not see the same menu options as shown in the menu pictured above when *you* view the menu.

### **Exit**

When you're finished using Volgistics, click "Exit" on the menu to close your session.

---

## **What's in Volgistics?**

Help topic 2292

Added or revised 06-21-2013

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Let's look at the kinds of information you can track and manage in Volgistics.

### **Volunteer records**

The core of the Volgistics system is your database of volunteers. This can include records for people who are interested in becoming volunteers (applicants), people who are currently volunteers (active), and past volunteers (inactive).

Each volunteer record has space for tracking people's core information, such as their name, address, and phone numbers. In addition, each volunteer record can have:

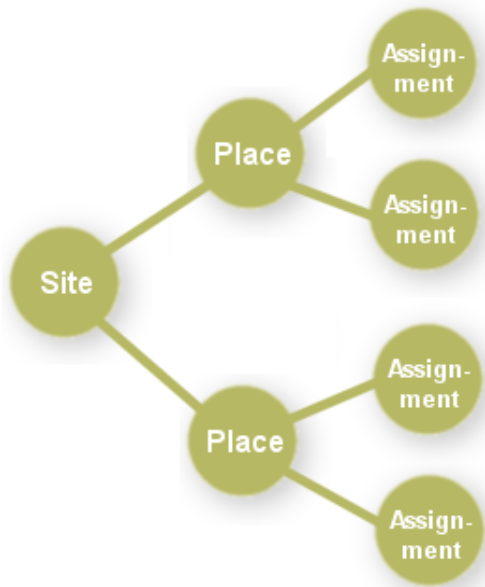
- Profile records for things like their interests, availability, and demographic information
- Service records that show what areas the volunteer serves in and their service – or hours – history
- Schedule records showing the dates and times the volunteer serves
- History records with key dates and a volunteer checklist
- Contact records for emergency contacts, references, or additional addresses
- Note records with space for written comments



### Assignment records

The next part of the system is your database of volunteer *assignments*. Volunteer assignments are the individual tasks or activities that volunteers perform in your organization. Your system can have a single assignment, or thousands of assignments, depending on your needs.





Each assignment record has space for tracking the name of the assignment. In addition, each assignment record can have:

- Profile records for things like pre-requisites and the times volunteers are typically needed
- Schedule records showing specifically when volunteers are needed, and which volunteers are scheduled when
- Coordinator records showing who coordinates or supervises the assignment
- Job descriptions

You can optionally organize your volunteer assignments in a *hierarchical* manner to match your organization's structure. For example, if you have different *program areas* or *locations*, you can organize your assignment records according to these.

This kind of organization makes it possible for you to print reports and view volunteers for individual assignments, or all of the assignments at a given place or site.

### Coordinator records

The third part of the system is an optional database of *coordinators*. Coordinators are the people who coordinate or supervise the volunteers in individual assignments, or in all of the assignments at a given Site or Place.

Each coordinator record has space for tracking the coordinator's core information, such as their name, address, and phone numbers.



### Volgistics puts it all together

All of these different kinds of information can work together in Volgistics. For example, you record service (such as hours) and schedule volunteers by assignment; and you can see lists of volunteers according to coordinator.



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## Where to Start

Help topic 2295

Added or revised 06-21-2013

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*Getting Started* is your guide to getting started with Volgistics. The guide is available online, and in a printable PDF format. It includes these sections:

- If you don't have an account yet
- Learning the Basics
- Account Setup
- Using Volgistics

If you're reading the guide online, clicking the **Next** arrow at the top of the page moves you forward to the next topic. The **Prev** arrow takes you back to the previous topic. To see the *Getting Started* index, click the **Getting Started** button.

### **If you don't have an account yet**

If you do not have an account yet, or want to learn more about how Volgistics works, you may find this section useful. The help topics in this section give information about Volgistics' practices and policies that protect your information, as well as instructions on how to start accounts.

### **Learning the Basics**

If you're new to Volgistics, the best place to start is *Learning the Basics*. The help topics in this section step you through key volunteer tracking functions and give you an idea of how to get around in the system.

### **Account Setup**

The help topics in this section are designed to help you get your Volgistics account setup so you can use it to track volunteers. If you're taking over a Volgistics account from someone else, you may also find it helpful to review this section so you have a better understanding of how the system works.

### **Using Volgistics**

Once you're familiar with the basics and have your account setup, use the help topics in the *Using Volgistics* section to learn more about the tasks that most interest you. You can skip over any of the topics in this section that describe features you don't need to use now or for which you're not responsible.

### **You're on your way!**

After you're started, you can visit the help page for instructions on specific tasks or advanced features. Use the search feature on the help page to search for any topic you need help with. If you can't find the help you need, you can post an inquiry for the Volgistics Team.

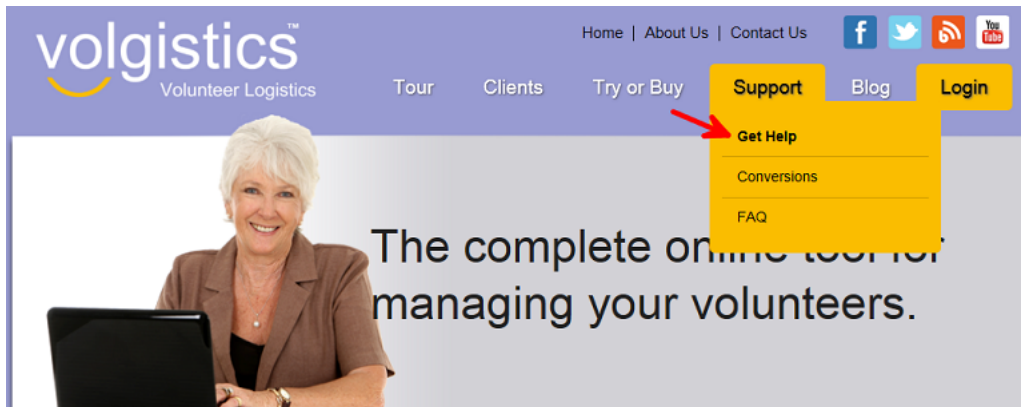
## Help Topics

The guide directs you to other Help Topics in the Volgistics help system for more detailed information about various features.

If you're reading the guide online, simply use the hyperlinks to visit these additional Help Topics.

If you're reading the guide as printed document, you can open these additional Help Topics like this:

1. If you are logged into Volgistics, select Help from the menu. Or if you're not logged in, hover over Support on the menu at [www.volgistics.com](http://www.volgistics.com) and select "Get Help."



2. Enter the Help Topic number or title in the Search field.

3. Click the **Go** button.

---

## Logging In

Help topic 2297

Added or revised 04-26-2016

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To access Volgistics you simply go to the [www.volgistics.com](http://www.volgistics.com) web site from any popular web browser, select Login from the menu at the top of the page, and then enter your login information.

To log in, you'll need your:

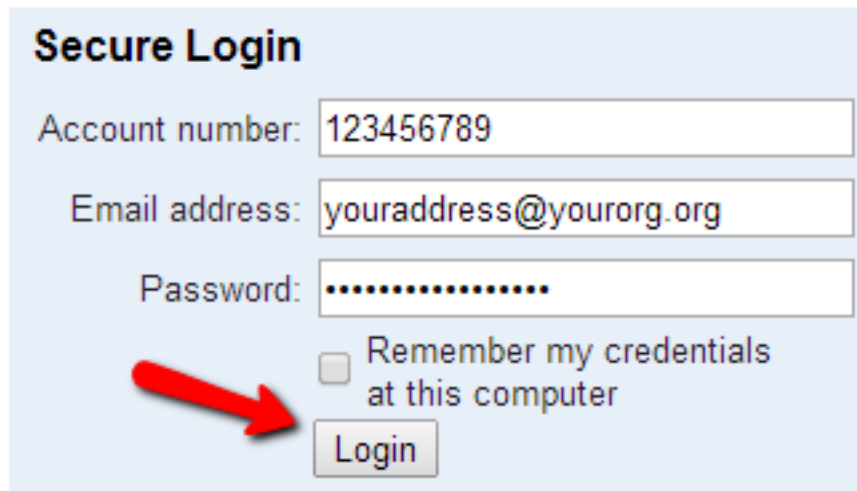
- nine digit Volgistics account number
- email address
- password

If you just created a trial account, use the nine digit Volgistics account number you received when you signed-up, and the email address and password you entered on the sign-up form. If you're not the person who signed-up for your account, you'll receive the account number, and your login name and password from them.

Carefully safeguard your Volgistics account number, login name, and password. Anyone who has these can access your Volgistics account.

To log in:

1. Visit [www.volgistics.com](http://www.volgistics.com).
2. Select Login from the menu at the top of the page.
3. Enter your account number, email address, and password in the Secure Login box. The email address field is not case sensitive, but the password field is.
4. Click the Login button.



**Secure Login**

Account number:

Email address:

Password:

Remember my credentials at this computer

### [Forget your password?](#)

#### **Forget your password?**

If you have forgotten your Volgistics password, or you get a message telling you that you have entered an invalid account number, login name, or password, click the "Forget your password?" link on the Login page. Volgistics will send a password reset message to the email address you use so you can access the account and create a new password. [Help topic 1306 \[pg:0044\]](#) has instructions that explain more about the password reset process.

#### **Remember my credentials at this computer**

The Secure Login box may include a "Remember my credentials at this computer" checkbox.

If you check this option when you log in, the computer you are currently using will remember your Volgistics account number and login name. The next time you log in from this computer, your account number and login name will already be entered for you – you'll just need to enter your password and then click the Login button.

In order for your computer to remember your Volgistics account number and login name, your web browser must allow [cookies \[pg:1615\]](#). If cookies are disabled in your web browser, checking this option will not have any effect.

#### **Sessions**

Once you log in, you establish what is called a *session* with the Volgistics system. As long as you are actively working in Volgistics, your session will stay open. You can work in the system as long as you want without having to log in again.

Volgistics includes an important security feature that closes a session if your connection to Volgistics is idle for more than about 60 minutes. This means that if you log in, and then leave your computer (or stop working in Volgistics) for more than about 60 minutes, your current session with Volgistics will automatically close. If this happens you'll see a [Session Expired \[pg:1589\]](#) message when you later return to the system. If you see this message, simply log in again and a new session will open.

This security feature protects you by reducing the possibility that you might leave the system open at a computer that is accessible to someone who is not authorized to access your information.

### Hint

If you want to access Volgistics from home or other locations, you'll need your nine digit Volgistics account number, as well as your login name and password. Unless you memorize your account number, you may want to record it on a card in your wallet or purse, or store it as a note on your cell phone. This way you'll have it if you want to log in from a different location, such as a co-worker's desk, or your neighborhood Internet café! Just be sure to keep your account number private.

To protect your account in the event that your wallet or purse is lost or stolen, we recommend that passwords always be memorized. At the very least, do not store your account number, email address and password in the same place. This prevents potential unauthorized users from discovering all three pieces of information at once.

### Related Help

[Help Topic 1006 \[ \]](#) - Session in use

[Help Topic 1146 \[pg:1589\]](#) - Session Expired

[Help Topic 1306 \[pg:0044\]](#) - Forget your password? (System Operators)

[Help Topic 2075 \[pg:1600\]](#) - Using web browser Back buttons

[Help Topic 2144 \[pg:0064\]](#) - Creating Desktop Shortcuts

[Help Topic 2203 \[pg:0064\]](#) - How do I change the login name or password I use to access Volgistics?

[Help Topic 2546 \[pg:1627\]](#) - Why am I receiving a "Webpage has expired" or "Session expired" message?

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## Getting Started

Help topic 2300

Added or revised 09-19-2016

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This guide is designed to help you get started with using Volgistics. It has sections to help you start an account if you do not have one, learning the basics about your account, setting up your account, and using the account once it has been setup. You can find more information on how to use this guide in the following help topic:

[Where to Start \[pg:0219\]](#)

## **Want to Dive Right In?**

The

### *Getting Started*

guide gives some useful background information at the beginning, but you may want to proceed directly to getting your account ready. In this case, we recommend the following help topics because they walk you through each step of the setup process in the suggested order. If a feature is not one that your organization will use, just skip that step. If you get hung up at any point, just submit an inquiry to the support team as shown [here \[pg:0184\]](#)

The setup help topics are:

[How to Setup Volgistics - Basic \[pg:2020\]](#)

[How to Setup Volgistics - Advanced \[pg:0234\]](#)

### **If you don't have an account yet**

[How reliable is Volgistics? \[pg:0180\]](#)

[How secure is Volgistics? \[pg:0181\]](#)

[The Volgistics Privacy Policy \[pg:0182\]](#)

[What's in Volgistics? \[pg:0216\]](#)

[Volgistics System Requirements \[pg:0179\]](#)

[How to Sign-up \[pg:0224\]](#)

[Logging In \[pg:0220\]](#)

[Getting Started Interview \[pg:0200\]](#)

[How to Activate a Trial Account \[pg:0226\]](#)

### **Learning the basics**

[Volgistics A - Z: A Glossary of Volgistics Terminology \[pg:2028\]](#)

[Volgistics Menu \[pg:0215\]](#)

[Sending and Receiving Help Inquiries \[pg:0184\]](#)

[Volunteer Record Organization \[pg:1849\]](#)

[Volgistics Administrator \[pg:0052\]](#)

[System Operator \[pg:0065\]](#)

### **Account Setup**



[Using Volgistics for Special Events \[pg:0191\]](#)  
[How to Setup Volgistics - Basic \[pg:2020\]](#)  
[How to Setup Volgistics - Advanced \[pg:0234\]](#)  
[How to setup text messaging \[pg:0321\]](#)

## Using Volgistics

[Finding Volunteer Records \[pg:1982\]](#)  
[How to customize which fields appear in the volunteer list \[pg:1381\]](#)  
[Tags \[pg:1529\]](#)  
[Working with Tags \[pg:1999\]](#)  
[Sets \[pg:0858\]](#)  
[How to Create a Set \[pg:0859\]](#)  
[How do service records get into Volgistics? \[pg:1568\]](#)  
[Substitute Tracking \[pg:0745\]](#)  
[How to Schedule Substitutes for Regularly Scheduled Volunteers \[pg:0797\]](#)  
[Tracking Volunteer Absences \[pg:1424\]](#)  
[How to find volunteers who did not serve as scheduled \[pg:0879\]](#)  
[Viewing a Volunteer's Checklist \[pg:0146\]](#)  
[Finding the Volunteers who Need to Complete a Checklist Item \[pg:0148\]](#)  
[Marking Checklist Items Complete \[pg:0144\]](#)  
[How to send an email message \[pg:0404\]](#)  
[How to send a text message \[pg:0343\]](#)  
[Stock Reports \[pg:0595\]](#)  
[Creating Custom Reports \[pg:0467\]](#)  
[Running Reports Automatically \[pg:0473\]](#)  
[Saving Volunteer Information Locally \[pg:0461\]](#)  
[Archived Versus Non-archived Records \[pg:0709\]](#)  
[Archiving Volunteer Records \[pg:1819\]](#)  
[Event Log \[pg:0028\]](#)

Download *Getting Started* in a printable PDF file

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## How To Sign-Up

Help topic 2301

Added or revised 01-28-2015

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If you'd like to learn more about Volgistics but you don't have an account yet, you have two options.

You can explore a sample account that is already setup and pre-loaded with information by clicking here. You can make any changes to the sample account that you'd like, but it will return to the original account's information and setup when your session is over.

You can also sign-up for a free trial account. Trial accounts allow you to upload your own information and configure your own account setup, and changes stay in place each time you log-in.

*Even if you know you're ready to subscribe now, you still start by signing-up for a free trial account. This takes just a few minutes, and you can enter your payment information right away if you want to skip the trial period.*

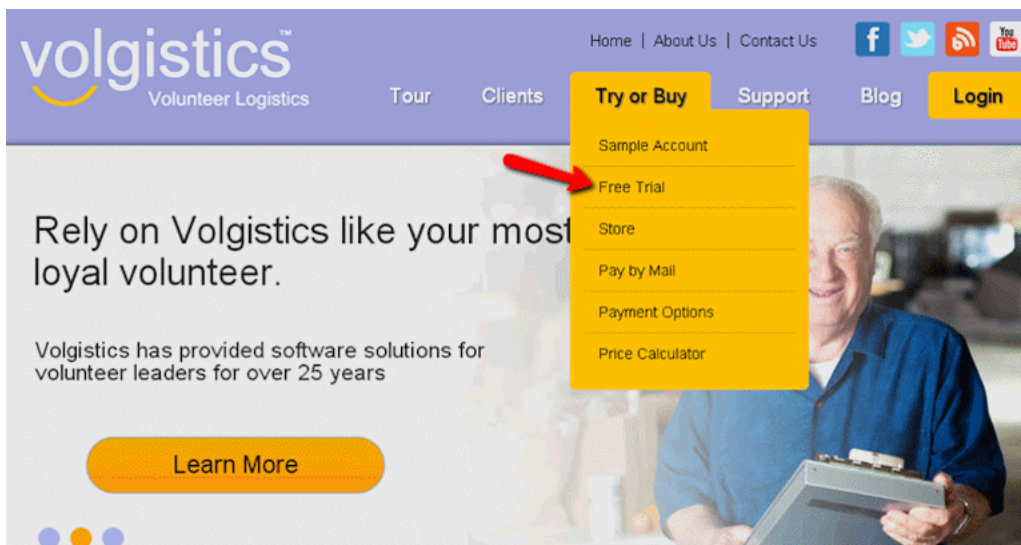
## The Free Trial Account

The free trial gives you a chance to try-out the system before paying for the service. Trial accounts work just like paid accounts and are limited to 50 non-archived records, 50 [archived \[pg:0709\]](#) records, and two [System Operators \[pg:0065\]](#). Trial accounts include full use of the [VicNet \[pg:1724\]](#) and [VicTouch \[pg:1778\]](#) modules.

Free trials are good for up to 30 days from the day you sign-up. If you decide you want to use Volgistics before the end of the trial period (or within 60 days of when your trial expires), you can enter your payment information and keep any customizations you made and/or information you entered during the trial.

### To sign-up for a free trial:

1. Visit [www.volgistics.com](http://www.volgistics.com).
2. Hover over Try or Buy on the menu at the top of the page and select "Free trial."



3. Click the **Click here to get started!** button.

Once you sign-up, you'll receive the Volgistics account number for your free trial account. Make a note of this number and keep it in a safe place. You'll need it to [login \[pg:0220\]](#) to your account. The first time you login, you will complete a [Getting Started Interview \[pg:0200\]](#) that starts the setup process for your account.

If you're ready to subscribe now, record your account number and follow the directions in [help topic 2302 \[pg:0226\]](#) to activate your account.

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## How to Activate a Trial Account

Help topic 2302

Added or revised 09-23-2016

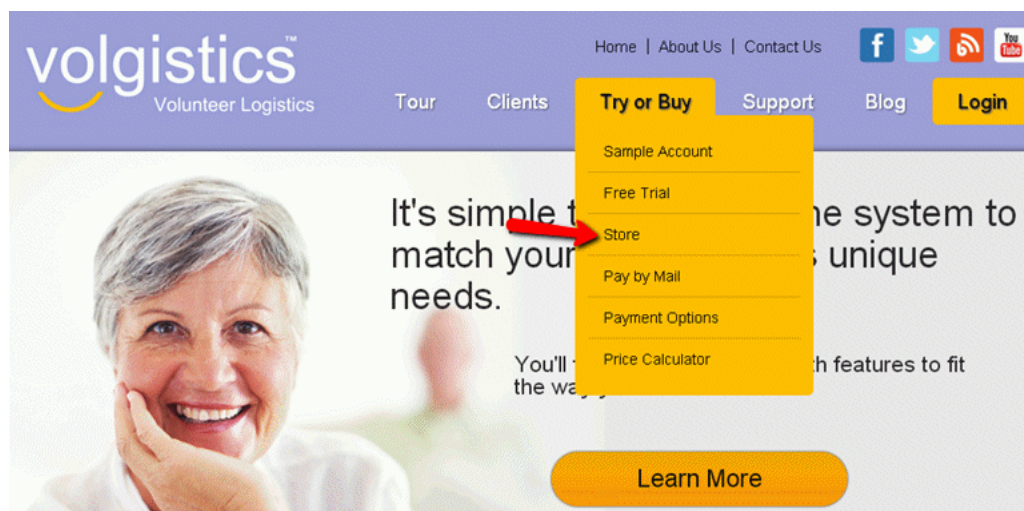
---

Once you determine that Volgistics meets your needs, simply activate your trial account at the secure Volgistics store.

When you activate your account you can optionally keep the customizations, [System Operators \[pg:0065\]](#), and information you entered during your trial; or you can start fresh by [clearing your account \[pg:0890\]](#) before you begin entering or importing real data. To keep what you've done in your trial account, activate your account before your trial expires or within 60 days of its expiration date.

To activate your trial account:

1. If you haven't started a trial account already, [start one now \[pg:0224\]](#). You'll need the nine digit Volgistics account number for your trial account, and your login name and password to activate your account. Be sure you know these before you continue.
2. Visit [www.volgistics.com](http://www.volgistics.com).
3. Hover over Try or Buy on the menu at the top of the page and select Store.



4. Enter the nine digit account number for your trial account and your Volgistics login name and password. Then click the **Continue** button.
5. Choose the payment method you prefer and click the **Continue** button. Follow the directions on the page to complete your payment.

[Help topic 2303 \[pg:0733\]](#) has more information about Volgistics payment options.

If you want to clear the information you entered in your trial account, [Help Topic 2112 \[pg:0890\]](#) explains how to do this.

### Related help

- [Help Topic 1999 \[pg:0709\]](#) - Archived Versus Non-archived Records  
[Help Topic 2002 \[pg:0710\]](#) - Volgistics Price List  
[Help Topic 2007 \[pg:0050\]](#) - Adding VicNet, VicTouch or VicDocs to Your Account's Service Level  
[Help Topic 2027 \[pg:0719\]](#) - Service Levels  
[Help Topic 2071 \[pg:0721\]](#) - How can I get an invoice for the service fee?  
[Help Topic 2074 \[pg:0723\]](#) - Has my payment arrived?  
[Help Topic 2166 \[pg:0731\]](#) - How do I change the service level on my account?  
[Help Topic 2303 \[pg:0733\]](#) - Volgistics Payment Options  
[Help Topic 2304 \[pg:0737\]](#) - Paying Your Volgistics Service Fee by Mail  
[Help Topic 2545 \[pg:0739\]](#) - How to Add a Purchase Order Number to an Order-Invoice

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## How to Setup Volgistics - Basic

Help topic 2323

Added or revised 06-21-2013

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Volgistics includes a variety of setup and customization options you can use to adapt the system to best suit your own needs for tracking and coordinating volunteers.

This help topic includes a plan you can follow to initially setup the basic aspects of Volgistics for your organization. It lists each of the key setup tasks with links to other help topics that have instructions on how to complete each task. If you already have the basics of your account setup, you can view a help topic on setting up more advanced aspects by clicking the **Next** arrow.

### Contents

1. Complete the *Getting Started* Interview
2. Add System Operators
3. Customize Fields
4. Add Types and Flags
5. Add Statuses
6. Start and Stop Date Rules
7. Add Volunteer Records
8. Add Assignments
9. Add Roles
10. Add Roles to Volunteers
11. Build Schedules
12. Add Holidays

#### 1. Complete the *Getting Started* Interview

When you first start your Volgistics account, you complete a *Getting Started* interview online. Volgistics uses the answers to these questions to initially configure system setup options to best suit your organization's needs.

If you have already started your Volgistics account (or if someone else in your organization did), this step has already been completed and you can continue with the next step.

If you have not [started a Volgistics account \[pg:0224\]](#) yet, you will have an opportunity to complete the *Getting Started* interview the first time you login to your account. [Help topic 2060 \[pg:0200\]](#) explains more about the *Getting Started* interview.

You can change any of the setup options initially configured in the *Getting Started* interview as you learn more about Volgistics, or as your needs change. They are not "set in stone" so you don't need to worry about not being able to change your choices later.

If you've already completed the Getting Started interview, there is usually no need to complete it again. However, if you want to run the Getting Started interview again, you can clear your account and select to clear your account setup. [Help topic 2112 \[pg:0890\]](#) explains how to do this. The first time you login after you clear your account you'll be asked to complete the Getting Started interview again. *Please remember if you choose to clear your account that any volunteer records or setup options you've already entered will be erased! So you should only clear your account if you want to erase all of your information and start from scratch.*

If you choose to clear your account so you can complete the Getting Started interview again, be sure to uncheck these options on the Clear Account page:

- Keep account setup
- Keep reports

## **IMPORTANT!**

If you are converting volunteer data into Volgistics from another program using the Import Utility, VolunteerWorks, or the Jump-Start service, do not proceed beyond this point until your data conversion is complete.

The data conversion process may set some options to match your existing data. The data conversion may also insert Assignments, Checklist item names, and Award names from your old data. Therefore you should not setup your account until after the data conversion is finished.

You can learn more about data conversion options in [Help topic 2299 \[pg:1878\]](#), or by visiting [www.volgistics.com](http://www.volgistics.com), hovering over Support on the menu at the top of the page, and selecting Conversions.

## **2. Add System Operators**

Volgistics [System Operators \[pg:0065\]](#) are the people in your organization who you want to be able to use Volgistics. Volgistics is a multi-user system. This means different people in your organization can use the system at the same time as long as they have each been setup as a separate System Operator.

Every Volgistics account starts with space for two System Operators. You can create additional System Operators beyond two if your account's [service level \[pg:0719\]](#) permits. See [Help topic 2166 \[pg:0731\]](#) if you want to add more System Operators than you currently have space for. You create your first System Operator record during the sign-up process when you start a free trial account.

If you want to add additional System Operators to your account now, follow the step-by-step instructions in [Help topic 2026 \[pg:1440\]](#).

You can always add more System Operators, or change your System Operator profiles later, if you want to complete the account setup before giving other people access.

## **3. Customize Fields**

Volgistics allows you to customize many of the fields in your account. In most cases you can change the name of the field and hide it if you will not need it. In some cases you can also change the formatting required for the field. The exception to this is system fields that cannot be changed.

There are also spare fields that can be setup for your organization's needs. These fields are located in the following locations:

Profile tab on volunteer records

6 Spare Dropdown  
6 Spare Fields\*  
6 Spare Checkbox

There are also **Characteristic fields** [pg:0033] that can be created.

Service tab on volunteer records

1 Spare Date  
1 Spare Dropdown  
1 Spare Checkbox

History tab on volunteer records

1 Spare Date  
1 Spare Dropdown  
1 Spare Checkbox  
1 Spare Text

Contacts tab on volunteer records

1 Spare Date  
1 Spare Text

Site tab on a Site record

6 Spare Dropdown  
6 Spare Fields\*  
6 Spare Checkbox

Place tab on a Place record

6 Spare Dropdown  
6 Spare Fields\*  
6 Spare Checkbox

Assignment tab on an Assignment record

6 Spare Dropdown  
6 Spare Fields\*  
6 Spare Checkbox

Coordinator tab on a Coordinator record

1 Spare Dropdown  
2 Spare Date

## Assignments tab on a Coordinator record

- 1 Spare Dropdown
- 1 Spare Checkbox
- 1 Spare Date

\*These fields can be given text, date, whole number, decimal (1 or 2 places), currency, or social security number format.

You can find a listing of all the fields available in Volgistics in [Help topic 1174 \[pg:0940\]](#). You can find directions and more information on how to customize fields in [Help topic 2017 \[pg:0957\]](#).

## **Important things to consider when customizing fields**

### **1.**

If you used one of the conversion methods (Import Utility, VolunteerWorks, or Jump-Start) to move volunteer and other information into Volgistics, you may find that some of the spare fields have been created for you already. In this case, you can edit the fields if they do not appear as you'd like. If the field is a dropdown list, or look-up table, [Help topic 2018 \[pg:0963\]](#) has information on how to edit the field.

### **2.**

If you're using the spare fields on the Profile tab of volunteer records to collect information from an application form, there is not a way to set the order the fields appear in within each section of the form. The order the fields appear in is determined by the type of field first (dropdown, general, checkbox) and then by the order the fields were created in. For example, if you create the following fields with the following names:

Association member (spare checkbox 1)

Ethnicity (spare dropdown 2)

Gender (spare dropdown 3)

Other last names (spare field 2)

Parking permit number (spare field 1)

Referral source (spare dropdown 1)

These fields would appear in the following order if they were all included on the same section of the application form:

Referral source (spare dropdown 1)

Ethnicity (spare dropdown 2)

Gender (spare dropdown 3)

Parking permit number (spare field 1)

Other last names (spare field 2)

Association member (spare checkbox 1)

If controlling the field order is important on your application form, you should make sure you create the fields with the order you want them to appear within application form sections in mind.

3. If the spare fields offered on the Profile tab of volunteer records are not sufficient, you may be able to use the [Characteristic \[pg:0033\]](#) and/or [Preference \[pg:1011\]](#) fields on this tab to collect additional information.

#### 4. Add Types and Flags

Types and Flags offer ways to categorize volunteer records in Volgistics. You can use them to control how you view volunteer records, run reports, apply Checklist and awards, send email messages, and other things. You may have setup some Types and Flags in your account during the Getting Started interview.

If you want to delete, add, or make new Types or Flags now, please see [Help topic 2263 \[pg:0212\]](#).

#### 5. Add Statuses

Volgistics tracks a volunteer's overall relationship with your organization by using the Status field. Each account can have up to eight different Status categories. By default, the categories are setup as Active, Applicant, Inactive and Prospect. All of these except the Active Status can be modified to be something else.

You can add, delete, modify, or setup a default Status for new records. [Help topic 2014 \[pg:1832\]](#) has information on how to do this.

#### 6. Start and Stop Date Rules

By default, Volgistics records a volunteer's Start date as the first date they have an Active Status and their Stop date as the first date they have an Inactive Status. You can learn more about this in [help topic 2315 \[pg:1890\]](#).

You can modify the rules used to determine a volunteer's Start and Stop dates to be based on different and/or additional Statuses. [Help topic 2314 \[pg:1017\]](#) shows how to do this.

#### 7. Add Volunteer Records

If you used one of the conversion methods discussed in the

Getting Started

section of this help topic, you may already have volunteer records in your account. If you didn't use a conversion method, or you need to add additional records, [Help topic 2298 \[pg:1877\]](#) shows how to manually enter records in your account.

Please note, in some cases (such as special events), you may want to use application forms to enter volunteers. In this case, you can skip this step and add volunteer records later.



## 8. Add Assignments

The next step is to begin adding the names of your volunteer *Assignments* to the system. Assignments are what your volunteers do for your organization. Every organization that has volunteers has at least one volunteer Assignment (or else your volunteers would have nothing to do!).

Assignment information is a key part of your database. Your Assignment list makes it possible for you to keep track of which Assignments volunteers are qualified to perform, which they are interested in or scheduled for, and so forth. It will enable you to print volunteer service reports broken-out by assignment, and view lists of volunteers according to Assignment.

At this point all you need for each Assignment you want to track is an Assignment *name*. Below are some examples of volunteer Assignment names taken from a variety of different kinds of organizations. Of course these are only examples. You should use your own Assignment names, which may be whatever you'd like (up to 72 characters long).

Assignment names can be [changed later \[pg:0135\]](#) so you don't need to worry if you're unsure of what to call an Assignment.

Docent	Book cart	Driver
Ticket taker	Usher	Records
Exhibit explainer	Phone bank	Public speaker
Donor recruiter	Receptionist	Tutor
Math tutor, 6-12	Trail maintenance	Circulation desk
Reading room	Client advocate	Ambassador
Greeter	Tour guide	Gift shop cashier
Radiology	Campaign phone bank	EMT
Emergency response trainer	Counselor	Hot line counselor
Water station	Front desk	Curb greeter
Legal advocate	Waiting room	Office assistant

In addition to storing the name of each Assignment, Volgistics can also help you organize, publish, and track other kinds of Assignment information too. For example, you can also enter things such as a job description, age requirement, the location where the Assignment is performed, the supervisor's name and contact information, and more. You can enter this additional information now as you're getting started, or you can return to each Assignment record later to add additional Assignment information.

Follow the step-by-step instructions in [Help topic 2215 \[pg:0106\]](#) to learn how to add an Assignment record.

You can enter your volunteer Assignments under one or more Sites and Places. This gives you a way to organize your Assignments according to geographic, program, or department divisions your organization might have. [Help topic 2099 \[pg:0096\]](#) explains more about this capability.

If you're not sure if you need to organize your Assignment list according to any kind of geographic, program, or departmental structure (or if you don't know what that structure is), you can simply add your new Assignments to the default *Volunteer Services Place*. If you choose to, you can easily [reorganize \[pg:0112\]](#) your Assignment list according to Places (or Sites and Places) later.

If you converted data from another program, some (or all) of your Assignments may already be in Volgistics. You can find out if your database already has any Assignments entered by choosing Assignments from the [menu \[pg:0215\]](#).

It's okay if you don't enter all of your Assignments right now. You can always add more Assignments later as you go.

## 9. Add Roles

Volgistics uses Roles as a way to show a volunteer's relationship to an Assignment. The default Roles are Assigned, Former, Preference, Substitute and Trainee. One volunteer can have multiple Roles in an Assignment. For example, a volunteer may regularly serve in an Assignment, plus be available as a substitute. So this volunteer could have Roles of Assigned and Substitute in the same Assignment.

You can customize the Roles used to relate volunteers to Assignments, and learn more about how this feature works, in [help topic 2173 \[pg:0103\]](#).

## 10. Add Roles to Volunteers

If you converted data from another program, some of your volunteer records may already have Roles recorded for Assignments. If not, and you know that some of your volunteers will serve in, or prefer, certain Assignments, you can give them a Role in these Assignments now. [Help topic 2399 \[pg:0138\]](#) shows how to do this. If you're unsure of which Assignments volunteers should have Roles in, these can always be assigned later.

You may also want to setup your account to automatically give volunteers a Role of Assigned in an Assignment if they are scheduled for, or have service hours recorded for, the Assignment. [Help topic 2265 \[pg:0906\]](#) shows how to set this up. Using automatic Assignment tracking can eliminate the need to assign volunteers a Role in Assignments now if you will schedule them later.

## 11. Build Schedules

In most organizations, volunteer schedules can be built in two different ways. There are Assignments such as *Trail Maintenance* or *Kennel Cleaner* where volunteers come in to complete a task that does not need to be performed at a specific time of day. Volgistics refers to these Assignments as "any time" Assignments. There are also Assignments such as *Tour Guide* or *Circulation Desk* where coverage is needed during specific shifts on specific days of the week. Volgistics refers to these Assignments as "openings only" Assignments. Your organization may have one, or both, of these types of Assignments.

For "any time" Assignments, you will schedule volunteers (or volunteers will [schedule themselves \[pg:1494\]](#)) once your account setup is complete. So there is not much to do for these Assignments at this point. However, for "openings only" Assignments you may want to setup the shifts, or times, volunteers are needed now. [Help topic 2158 \[pg:0776\]](#) shows how to do this. Of course, if you're unsure of when your volunteers will be needed, you can always add (or modify) Assignment openings later.

Regardless of whether your Assignments are "any time" or "openings only" Assignments, you should also review [help topic 1180 \[pg:0746\]](#) to get an overview of how the scheduling features work in Volgistics. This help topic also has links to other help topics to help you setup the ground rules for scheduling in your account.

## 12. Add Holidays

Your organization may have days when volunteers are not needed, or you operate with just a skeleton staff of volunteers. In this case, you can mark these days as holidays in your account. Doing this will remove any regularly scheduled volunteers, and recurring unfilled openings, from your schedule on these days. If you still need volunteers to come in, you can schedule them specifically for that date or create one day only openings on the date. [Help topic 1022 \[pg:1391\]](#) explains more about how this feature works and how to setup the holiday

dates.

Depending on how much of the year has passed, you may want to setup the holidays in your account for the remainder of the present year and/or for the following year at this time. You can always mark your office calendar, or set a reminder, to update holidays for the future years during the time of year that works best for you.

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## How to Setup Volgistics - Advanced

Help topic 2324

Added or revised 12-02-2015

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Volgistics includes a variety of setup and customization options you can use to adapt the system to best suit your own needs for tracking and coordinating volunteers.

This help topic includes a plan you can follow to initially setup the more advanced aspects of Volgistics for your organization. It lists each of the key setup tasks with links to other help topics that have instructions on how to complete each task. If you have not setup most of the basics in your account yet, this should be done first. Click the **Prev** arrow to see a help topic on setting these up, or click [here \[pg:0227\]](#).

### Contents

1. Choose Fields for Service Entries
2. Add Service Measures
3. Add Merit Hours
4. Add Service Values
5. Add Mandatory Service
6. Add Checklist Items
7. Add Awards
8. Create Application Forms
9. Add Opportunity Directory
10. Add Email Types
11. Setup VicNet
12. Setup VicTouch
13. Setup VicDocs

If you plan on tracking the [number of hours volunteers serve \[pg:1581\]](#), you can customize which fields appear for tracking hour information when you enter hour records manually.

Follow the step-by-step instructions in [Help topic 2325 \[pg:1429\]](#) to make this customization.

### 2. Add Service Measures

In addition to tracking volunteer service hours, Volgistics also allows you to track things such as the number of tours a volunteer gave, the number of phone calls a volunteer made, how many miles a volunteer drove, or how many absences a volunteer has accumulated. To do this, you create custom Service Measures in your account. [Help topic 1016 \[pg:1557\]](#) explains more about how this feature works.

If you'd like to setup Service Measures in your account now, [help topic 1017 \[pg:1406\]](#) shows how to do this. If you're unsure of what Service Measures you might need, or are not ready to set these up now, you can always do this later.

### 3. Add Merit Hours

You may have assignments or schedule times where you want to adjust volunteer hours recorded. For example, if you have schedule shifts where volunteers take a lunch break and you want to deduct half an hour from their recorded hours. Or if you want to give volunteers who serve on weekends or holidays time and a half instead of their regular hours. You can do this by setting up Merit Hour rules in your account. [Help topic 1100 \[pg:1564\]](#) explains more about this feature.

If you'd like to setup Merit Hour rules in your account now, [help topic 1101 \[pg:1409\]](#) shows how to do this. If you're unsure of what Merit Hours rules you might need, or are not ready to set these up now, you can always do this later.

### 4. Add Service Values

Some organizations track a monetary value for the service hours that volunteers perform. If you'd like to do this, you can setup a default value for all assignments, or select a different value for different assignments. You can even select a time frame for when the value will apply. [Help topic 1162 \[pg:0034\]](#) explains more about this feature.

If you'd like to setup Service Values in your account now, [help topic 1163 \[pg:1413\]](#) shows how to do this. If you're unsure of what Service Values you might need, or are not ready to set these up now, you can always do this later.

### 5. Add Mandatory Service

You may have programs where volunteers are required to perform a certain number of service hours. For example, students working on volunteer service required by a school, volunteers who earn an incentive such as a free museum pass, or even court required community service. In these cases, you can use Volgistics' Mandatory Service feature to track these volunteers. You can find questions and answers on how this works, plus instructions on how to set it up in your account, in [help topic 2156 \[pg:1419\]](#).

### 6. Add Checklist Items

The Volgistics [Checklist \[pg:0142\]](#) feature provides tools for keeping track of actions or requirements that new or current volunteers must complete. If your organization has requirements for volunteers, such as those listed below, you can setup a Checklist item for each requirement and then use the Checklist feature to monitor and manage compliance for each. Each account can have up to 36 different Checklist items.

You can use the Checklist to track requirements such as:

- Attending orientation
- Health screenings
- Confidentially agreements
- Parental consent forms
- Background checks
- Reference checks

If your organization has specific volunteer requirements like these that you need to track, you can add them to your account now.

To help you with this task, you can optionally print this page (use the Print function in your web browser) and then list each of the requirements you want to track on the form provided below. If some of your volunteer requirements only apply to certain volunteers, make a note of which volunteers these items apply to.



If your organization has a formal volunteer recognition program with specific awards, you can add these awards to your Volgistics account now.

To help you with this task, you can optionally print this page (use the Print function in your web browser) and then list each of the awards you want to track on the form provided below.

Award name	When do volunteers receive this award?

When you're ready to add these awards to Volgistics, follow the step-by-step instructions on adding award items in [help topic 3022 \[pg:1551\]](#).

If you're not ready to add award items now, or if you are not sure what all of your volunteer awards are, you can always add (or modify) award items later.

**Please Note**

If you've converted data from another program, the names of your awards may have been added during the conversion. However, you will still need to set the criteria for each award.

**8. Create Application Forms**

You may want to create one or more application forms to collect information from prospective volunteers. When applicants submit a completed form, you can accept their record into your database and the information is automatically transferred so you do not need to enter it manually. [Help topic 2121 \[pg:0413\]](#) explains more about how this process works.

To setup your forms, you may also find [help topic 2122 \[pg:1361\]](#) and [help topic 1053 \[pg:1334\]](#) useful.

If you're adding the application form to your organization's website, [help topic 2252 \[pg:0208\]](#) has information on integrating the form with your site.

## 9. Add Opportunity Directory

Volgistics comes with an Opportunity Directory feature that allows prospective volunteers to view Assignments they may be interested in. You can put a link to this directory right on your website. [Help topic 2250 \[pg:0420\]](#) explains more about this and how to setup your directory.

If you're adding the Opportunity Directory to your organization's website, [help topic 2252 \[pg:0208\]](#) has information on integrating this with your site.

## 10. Add Email Types

Volgistics provides email preference features needed to ensure the integrity of automatic and mass messages. These features enable volunteers and coordinators to opt-in or opt-out of different types of automatic or mass messages your organization might routinely send. [Help topic 2100 \[pg:0381\]](#) explains more about how this feature works.

You should setup your account to include the different types of email and text messages you will be sending. [Help topic 1023 \[pg:1321\]](#) shows how to do this.

## 11. Setup VicNet

The VicNet module allows your volunteers to sign-in to a secure portal from any Internet connected computer to perform tasks like viewing and managing their schedules, signing-up for vacant openings, keeping their contact information up-to-date, posting their hours, receiving news and messages, and checking on service information recorded for them. You can learn more about this feature in [help topic 3020 \[pg:1724\]](#).

If you will be using VicNet, you can set this up now by following the directions in [help topic 1175 \[pg:1670\]](#).

## 12. Setup VicTouch

VicTouch is the optional Volgistics module used to provide interactive onsite touch screen kiosks for volunteers. Among other features, VicTouch provides a time-clock function volunteers can use to check-in and out when they arrive and depart. Service recorded this way will automatically be added to volunteer records. You can learn more about this feature in [help topic 3021 \[pg:1778\]](#).

If you will be using VicTouch, you can set this up now by following the directions in [help topic 1184 \[pg:1755\]](#).

## 13. Setup VicDocs

VicDocs is the optional module that allows you to store electronic documents on volunteer, [Coordinator \[pg:0163\]](#), and [Site, Place, and Assignment \[pg:0096\]](#) records. You can find questions and answers about VicDocs in [help topic 3019 \[pg:1648\]](#).

If you will be using VicDocs, you can set this up now by following the directions in [help topic 2547 \[pg:1629\]](#).

If you're following along on Getting Started with Volgistics, you've reached a point where you're about ready to begin using the system. If you skipped some setup options, you can always return and set these up later. The help topics that follow explain how to perform some tasks that you might find helpful as you use Volgistics to manage and track your volunteers. Click the **Next** arrow to proceed to the first of these help topics.

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## Volgistics A - Z: A Glossary of Volgistics Terminology

Help topic 2500

Added or revised 11-18-2016

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Volgistics uses specific terminology regarding the different aspects of your account. It can sometimes be confusing if you do not know what the terms mean. This help topic defines each term and can be a helpful resource when you are using the system.

You can click a letter in the *Index* box to go directly to a section of this help topic.

### Index

**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**

**Account** - When the Volgistics team refers to an *account* they mean the entire database of records for your organization. Each Volgistics account has only a single account number and service level. The support team often gets help inquiries where *account* is used to refer to different things in the system such as volunteer, Coordinator, or System Operator records. Or sometimes even the Site, Place, or Assignment records. Volgistics generally refers to these items by name instead of as an *account*.

### Accounting Access Code

- This code allows people who are not setup as

System Operators

(or System Operators who have the

Basic User

or

Power User

operator levels) to gain access to the Volgistics Store for your account. You can find more information [here \[pg:0728\]](#).

**Accounting Operator** - This term is used to describe any person who can access the Volgistics Store for your account using the Accounting Access Code. This person may, or may not, be the Billing Contact on file for your account. The Accounting Operator does not count as a System Operator in your account's service level.

**Active Status** - This is a default Status in Volgistics that cannot be modified. The Active Status is generally used to describe a volunteer who has completed the induction process to volunteer with your organization and is now contributing. Please see Status in this glossary for more information.

**Activity** - Please see Assignment in this glossary for more information.

### Address Label Reports

- These reports make



PDF

files that put names and addresses for volunteers,

contacts

for volunteers, and/or

Coordinators in common formats for sheet fed laser or ink jet printer labels. You can find more information [here \[pg:0483\]](#).

**Administrator** - Also referred to as *Volgistics Administrator*. Please see Volgistics Administrator in this glossary for more information.

**Alerts** - Notifications sent to System Operators or Coordinators when events occur such as receiving an application, self-scheduling, or email opt-outs by a volunteer.

**Anniversary Cards** - Please see Greeting Cards in this glossary for more information.

**Any Times** - A term used to describe Assignments or schedule entries that do not require volunteers to serve specific times. You can setup the Rules tab of an Assignment to allow self-scheduling for *any times* in Assignments that do not require volunteers to serve a certain shift. Please see Schedule in this glossary for more information.

**Applicant Status** - A default Status in Volgistics generally used to describe people who have begun the process of becoming a volunteer by filling out an application form. Please see Status in this glossary for more information.

### Application Forms

- Online forms people interested in serving with your organization can complete. Information from these forms is automatically used to create volunteer records in your account. You can find more information [here \[pg:0413\]](#).

### Applications Tab

- A tab in the Volgistics

mailbox

used to receive new

application forms

and records

converted (imported)

into your account. You can learn more about how to receive records from the Applications tab [here \[pg:0415\]](#).

### Archive

- A section of your database used to store inactive, or un-needed, volunteer records, or the act of sending these records to the archived section. Please note this is separate from

Status

. Archived and non-archived records can have any Status in your account regardless of the section they are in. Because archived records have more limited functionality than non-archived records, they cost less on a record-by-record basis. You can find more information [here \[pg:0709\]](#).

**Assigned Role** - Roles in Volgistics are used to show the volunteer's relationship, or standing, in a specific Assignment. The Assigned Role is a default Role generally used to show that the volunteer is currently serving in the Assignment. Please see Role in this glossary for more information.

## **Assignment**

- The task, or work, the volunteers actually perform at your organization. Some organizations may refer to these as

*events, jobs, opportunities, work area, projects,*

or

*positions*

. Creating Assignments is important because it gives you more options for scheduling and recording service. You can find more information [here \[pg:0096\]](#).

## **Assignment Cluster**

- A Volgistics feature that allows you to group or organize similar

Assignments

together even if they are not listed under the same

Site

or

Place

in the account's Site, Place, and Assignment hierarchy. When this feature is enabled, many reports can be organized by Cluster. You can learn more about how to enable this feature [here \[pg:0934\]](#).

## **Assignment Preference Field**

- A

preference

field that applicants and volunteers can use to express that they are interested in serving in an assignment. You can learn more about setting up this field [here \[pg:0991\]](#). You can learn more about using this field on application forms [here \[pg:1351\]](#).

## **Assignment Profile Reports**

- These reports create

PDF files with information about Assignments in your account. You can find more information [here \[pg:0492\]](#).

## **Attachment**

- A PDF or Microsoft Word document that is sent out with an email message. You can find more information [here \[pg:0368\]](#).

## **Audit**

- Each account's

Administrator(s)

can configure the account so that System Operators can review service records for accuracy. You can find information on how this works [here \[pg:1415\]](#).

**Automatic Messages** - Email or text messages automatically sent to volunteers and Coordinators by Volgistics. These can include schedule reminders, Checklist reminders, password messages, or self-scheduling alerts.

### **Automatic Payment**

- A payment option for paying your Volgistics service fee with automatic monthly payments charged to your credit card. You can find more information [here \[pg:0733\]](#).

### **Awards**

- A recognition program for tracking volunteer milestones such as a certain number of years or hours served. You can also setup recognition for things not based on a milestone, such as a *Volunteer of the Month* award. You can find more information [here \[pg:1551\]](#).

### **Awards Reports**

- Stock reports designed to help you manage your Award program. You can find more information [here \[pg:0504\]](#).

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### **Back-up**

- Storing data for future reference. Volgistics does a system-wide back-up of all accounts nightly, but these can only be used to restore the entire system in the case of a catastrophic emergency. You may also want to make a local back-up of your volunteer information using an Excel report. You can find more information [here \[pg:0461\]](#).

**Basic User** - A user level that controls the amount of access the System Operator has in the account. To customize the access, Administrators setup the Field Rights and Tab Rights for the Basic User operators.

### **Batch Reports**

- A report listing all service entries in a batch of service recorded with the Post feature. You can see an example of this report [here \[pg:0599\]](#) and find more information about the report [here \[pg:0426\]](#).

### **Billing Contact**

- The person you select to receive automatic email messages concerning your account's status. This person may be the account's

Administrator

or another

System Operator

. Or it may be a person from a department in your organization that handles payments. You can find information on how to update the email address on file for the billing contact [here \[pg:0706\]](#).

**Birthday Cards** - Please see Greeting Cards in this glossary for more information.

### **Birthday List**

- You can setup Volgistics to display a list of volunteers who have upcoming or recent birthdays on the

Welcome page

that

System Operators

see when they login. The list can be configured to update automatically on a daily, weekly, or monthly basis. You can find more information [here \[pg:1385\]](#).

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**Calendar Year** - The standard calendar year running from January 1st to December 31st. Your reports for volunteer service can be organized by calendar year, or fiscal year.

**Cards** - Please see Greeting Cards in this glossary for more information.

### **Characteristic Field**

- These customizable fields provide checkboxes for collecting information about your volunteers. They are ideal for recording things such as skills, interests, languages spoken, memberships, certifications, and more. You can find more information [here \[pg:0033\]](#).

### **Checklist Item**

- Checklists provide a tool for tracking the completion of actions volunteers must fulfill in order to serve. They can be one time requirements (such as reference checks, orientations, or confidentiality agreements) or recurring requirements (such as flu shots or background checks). You can find more information [here \[pg:0142\]](#).

**Checklist Reminders** - Automatic messages that are sent to volunteers to let them know that a recurring Checklist item is due.

**Cluster** - See Assignment Cluster for information.

### **Comment Fields**

- A field that can be added to volunteer

application forms

to collect narrative information. When the application form creates the

volunteer's record

, information entered in the Comment field is directed to the

Notes tab of the record. You can find more information on how to add Comment fields to application forms [here \[pg:1345\]](#).

### **Contacts**

- The information for a volunteer's or group's contacts found on the Contacts tab of their record. Typical contacts include [Emergency Contacts \[pg:1829\]](#), [References \[pg:1828\]](#), and [Employers \[pg:1830\]](#). Other kinds of contacts can be customized. Contact fields can also be added to

application forms. You can find more information on how to do this [here \[pg:1346\]](#).

### **Contacts Tab**

- A tab on the volunteer record where the Contacts for the record are stored. You can find more information on volunteer record organization [here \[pg:1849\]](#).

### **Conversion**

- The process of importing, or transferring, volunteer information from a previous database or file into your Volgistics account. You can find more information about the options for creating volunteer records [here \[pg:1878\]](#).

### **Coordinator**

- A Volgistics user who can access basic volunteer information and schedules through the

VicNet

module. These users do not have the same degree of access to the account as

System Operators

. Many organizations refer to their volunteer department's leaders as

*coordinators*

; however, these people may have

*System Operator* records in your account. You can find more information about Coordinator records [here \[pg:0163\]](#).

### **Core Tab**

- This is a tab on the volunteer record where the basic information for the volunteer or group is stored. You can find more information on the Core tab [here \[pg:1868\]](#).

### **Count**

- The number of records in your account. You can find totals for the number of records used by selecting

Setup

from the

menu

, expanding the

*Account management*

link, and selecting

*Account status*

. You can also find numbers for volunteers with just certain characteristics. You can find more information on how

to do this [here \[pg:1815\]](#). If you want to find the number of volunteers with service during a certain time period, use the Unduplicated Volunteer Count.

## **Credentials**

- The information used by a

System Operator

to access Volgistics. This includes their account number, plus the email address and password

on file for them on their System Operator record. You can find more information about how to use credentials to login [here \[pg:0220\]](#).

## **Custom Reports**

- Volgistics contains

Stock Reports

that are pre-made reports designed to meet a variety of common volunteer tracking needs. You can also create *custom reports*

where you select the organization, format, and fields for the report. You can find more information on creating custom reports [here \[pg:0467\]](#).

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**Daily Availability** - A field used to track when volunteers are available to serve as well as when volunteers are needed for an assignment. This field appears on the Profile tab of volunteer and assignment records.

## **Date Entered**

- The date a volunteer record was added to your database. This date is recorded on the

History tab

of the volunteer record and is available in Sets and reports. You can find information on how records are added to your database [here \[pg:1878\]](#).

## **Date of Last Activity (DOLA)**

- Date of Last Activity is sometimes abbreviated as DOLA. The Date of Last Activity is the date of the last service entry

made on a volunteer record. This date appears in the Statistics box on the volunteer record and is available in Sets and reports. You can find more information [here \[pg:0076\]](#).

## **Department**

- Volgistics does not have a term, or item, called

*department*

; however, many accounts use this term to refer to a Site, Place, or Assignment in their account's assignment structure. You can find more information [here \[pg:0096\]](#)

**Display Graphic** - This is an image uploaded to Volgistics so that it appears on the online forms used in your account. Please see Logo Graphic in this glossary for more information.

## **Docs Tab**

- This is a tab on records for electronic document storage. The Docs tab always appears on volunteer records (learn more [here \[pg:1630\]](#)). If the VicDocs module is included in your account's service level, there will also be a Docs tab on Coordinator records (learn more [here \[pg:1636\]](#)) as well as Site, Place, and Assignment records (learn more [here \[pg:1642\]](#)).

## **Documents Tab**

- A tab on the Volgistics

Mailbox

designed to help you manage your documents. The Documents tab will always have sub-tabs for

attachment

and

volunteer

documents. If the

VicDocs

module is included in your account's

service level

, there will also be sub-tabs for

Coordinator, Site, Place, and Assignment documents. You can learn more about the Documents tab [here \[pg:0388\]](#).

**DOLA** - Please see Date of Last Activity (DOLA) in this glossary for information.

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## **Email Messages**

- Communication sent to your volunteers and/or Coordinators via email. You can find more information on how to send email messages [here \[pg:0404\]](#).

## Email Codes

- Codes that can be inserted into the body of your email message to personalize the message with your volunteer's information. You can find more information [here \[pg:0386\]](#).

**Email Opt-out** - Please see Opt-out in this glossary for information.

## Email Preferences

- Part of the

Opt-out

feature that allows volunteers and

Coordinators to select the types of email messages they wish to receive. You can find more information [here \[pg:0381\]](#).

## Email Types

- Categories of email messages volunteers use to select their Email Preferences. You can find more information [here \[pg:1321\]](#).

**Event** - Volgistics does not use the term *event* for anything but the actions, or tasks, a System Operator performs. However, many organizations use the term *event* to refer to a function where their volunteers will serve, or to the actual jobs or tasks the volunteers will perform at the event. In Volgistics, you will typically use Site or Place records for the overall event, and Assignment records for the jobs or tasks volunteers perform at the event.

## Event Log

- The Event Log is a record of key actions for your account. Quite often these are related to actions performed by a

System Operator

, but they can also be events the system initiates. Only key actions are tracked because logging every single action is not practical due to the additional processing and storage requirements this would introduce. You can find more information [here \[pg:0028\]](#).

**Excel** - A Microsoft application used for spreadsheet data. Volgistics does not supply the Excel program, but it can produce reports in Excel format. You can find more information in the Excel Spreadsheet Report entry.

## Excel Spreadsheet Reports

- Reports produced by Volgistics in spreadsheet format using the Excel file extension (.xlsx). There is a specific Excel report type [here \[pg:0513\]](#), and many other stock and custom reports can also be produced in Excel format.

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## Field Rights

-

Administrator(s)

can restrict



## System Operator

access to certain fields according to the operator's

## User Level

. Fields can be hidden from view for a user level, or set to *View only* so the user can see the information but not change it. You can find more information [here \[pg:0957\]](#). You may also want to see Tab Rights in this glossary for more information.

## Fields

- Fields in Volgistics refer to locations where you can store information. Fields can have different types or formats such as text, date, dropdown list, or checkbox. You can find more information about the fields available in Volgistics [here \[pg:0940\]](#).

**Fill Link** - The Fill link is a link that appears beside an unfilled opening on your account's schedule. Clicking this link opens the *Fill an opening* box so that you can schedule a volunteer to fill the opening slot. Please see *Opening* in this glossary for more information on schedule openings.

**Filled Opening** - A filled opening slot means a volunteer is scheduled to serve in the shift that the opening represents. Please note that one opening can have multiple slots (for instance if 5 volunteers are needed for the shift). So even if a volunteer is filling one of the slots, there may still be unfilled opening slots available for the same opening. You can use the schedule icons as a visual indicator to see if an opening slot is filled or unfilled.

## Fiscal Year

- A 12-month period used to calculate annual financial statements. This is sometimes also called a *financial year*

or

*budget year*

. You can setup Volgistics to figure

year-to-date (YTD)

totals and reports based on your organization's fiscal year. You can find more information on this [here \[pg:0062\]](#).

## Flags

- Flags provide a way to identify and categorize volunteer records. Flags differ from Types because a volunteer can have multiple Flags but only one Type. You can find more information [here \[pg:0212\]](#).

## Floating Subtotal

- Two customizable floating subtotal fields are available to help you track service

over a certain range of months. The floating subtotal fields are available on most reports and in the Statistics box on the Core tab of the volunteer record. You can find more information [here \[pg:1387\]](#).

**Former Role** - Roles in Volgistics are used to show the volunteer's relationship, or standing, in a specific Assignment. The Former Role is a default Role generally used to show that the volunteer previously served in an Assignment, but is not serving in the Assignment at the current time. Please see Role in this glossary for more information.

**Frequency** - The *Frequency* field is a field that is used for schedule entries to show how often the entry will occur. It can be set to One time for assignments that will take place on just one date, or Regular if the entry will repeat on certain weekdays.

**FTE** - Please see Full-Time Equivalent (FTE) in this glossary for information.

### **Full-Time Equivalent (FTE)**

- Full-time equivalent (FTE) refers to a unit used to indicate a workload, or count, for hourly resources. Volgistics can assist volunteer leaders by calculating a FTE for volunteer service. You can find more information [here \[pg:1563\]](#).

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### **Getting Started Interview**

- The

*Getting Started Interview*

takes place the first time someone logs-in to a new trial account. It is used to setup some basic options for the account, which can be changed later if necessary. You can find more information on what the interview covers [here \[pg:0200\]](#).

**Graphic** - In software, this generally refers to a picture or image file. There are two locations in Volgistics where graphic files can be used. Please see Logo Graphic and Vic Graphic in this glossary for more information.

### **Greeting Cards**

- Birthday, start date anniversary, and holiday cards that can be setup to appear when volunteers sign-in to the VicTouch module. You can find more information [here \[pg:1776\]](#).

### **Group**

-

Volunteer records

designed to be used when you have a group of volunteers (such as a school service group, or a group of volunteers from a business or social club). Group records are designed to be used when you do not need to track service, contact, and other information for each individual that serves as part of the group. You can find more information [here \[pg:1909\]](#).

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**Headquarters Operator** - When an account has the Site Level Access feature enabled, a *headquarters operator* is an operator assigned to all Sites instead of one particular Site.

**Help E-mail Tab** - A tab in the Volgistics Mailbox used to submit and receive help inquiries.

## Help Inquiry

- Volgistics offers free, unlimited online support. A

*help inquiry*

refers to a question that has been submitted to our support team. You can find information on the recommended method of submitting questions from your Volgistics account [here \[pg:0184\]](#).

## History Tab

- This is a tab on the volunteer record where date records and the message history for the volunteer are stored. Date records are kept for things like when a

Status

was given, when a

Checklist

item was completed, or when an

Award was received. The message history tracks when messages were sent to the volunteer as shown [here \[pg:0370\]](#). You can find more information about the tab structure of volunteer records [here \[pg:1849\]](#).

**Holiday Cards** - Please see Greeting Cards in this glossary for information.

## Holidays

- If your organization closes or keeps a reduced staff on certain days, you can clear the ongoing schedule for the date by using the *Holidays* feature. You can find more information on how this works [here \[pg:1391\]](#).

**Hours** - Please see Service Entry in this glossary for information.

## Hours of Operation

- The opening and closing times for when you will use volunteers. The

*Hours of Operation*

control the beginning and ending times for when volunteers can be scheduled. You can find more information [here \[pg:1395\]](#).

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**Import** - Please see Conversion in this glossary for information.

## In Box Tab

- A tab in the Volgistics

Mailbox used to receive Reports and Alerts. You can find more information on the In Box tab [here \[pg:1917\]](#).

**Inactive Status** - A default Status in Volgistics generally used to describe people who are no longer volunteering with your organization. Please see Status in this glossary for more information.

## Include

-

### *Include*

refers to selecting which volunteers appear on a list, report or tab. Two spots where Include settings appear are the

Volunteers Page

, and the

Volunteers Tab

. In addition, each

report

has an Include tab that controls which volunteers appear on the report. You can learn more about the Include tab on reports [here \[pg:0426\]](#).

### **Individual**

- Individual records in Volgistics represent one volunteer. You can learn more about the tabs and information that can be stored on records [here \[pg:1849\]](#). Volgistics also offers group records. Please see Group in this glossary for more information on group records.

**Invoice** - Please see Order-Invoice in this glossary for information.

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**Job(s)** - Please see Assignment in this glossary for information.

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**Kiosk** - *Kiosk* can refer to the furniture or structure used to hold a computer. In Volgistics, we generally use the term *kiosk* to refer to your account's VicTouch Sign-in Station.

### **Kiosk Mode**

- A method of launching the

VicTouch module

that causes the display to fill the entire monitor or screen. This give the most secure and reliable experience because it removes the

web browser

controls from view so only people with a special code can shut down VicTouch. You can learn more about how to configure your web browser to launch VicTouch in kiosk mode [here \[pg:1765\]](#).

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## Labels Reports

- Volgistics has reports designed to produce PDF files that can be used with sheet fed labels such as file labels. You can find more information [here \[pg:0523\]](#).

**Leave of Absence Status** - Please see LOA Status in this glossary for information.

## Life Hours

- The grand total of all

service hours

entered for a volunteer. This figure is available on the volunteer's

Service tab

, and can be added to the

Statistics box on the Core tab of the volunteer's record. The figure is also available on the [Fields tab \[pg:0426\]](#) of most reports, and can be used as a benchmark when configuring Volgistics to determine who is available for awards.

**LOA Status** - A custom Status Administrator(s) can create in the Volgistics account. It is generally used to describe people who are on a Leave of Absence (LOA) from volunteering, but will likely return to an Active Status. Please see Status in this glossary for more information.

**Local Back-up** - Please see Back-up in this glossary for information.

## Login

- Entering your credentials and starting a Volgistics session. The account's System Operators can find more information [here \[pg:0220\]](#). Volunteers and Coordinators can find more information by watching the training videos at [www.volgistics.com/volunteer-training-videos](http://www.volgistics.com/volunteer-training-videos)

## Logo Graphic

- Image files uploaded to your account that contain your organization's logo. Separate graphics can be uploaded for your Display Graphic, Print Graphic, and Mobile VicNet Graphic. You can find more information on uploading graphics [here \[pg:1353\]](#). Your account may also have Vic Graphics. Please see Vic Graphic in this glossary for more information.

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## Mail Merge

- Using a source document that contains information such as volunteer names, addresses, etc. to copy this information into a template letter, or other document. The mail merge is performed using word processing or similar software to individualize each copy of the finished document with the information from the source document. You can find information on making a source document in Volgistics [here \[pg:0425\]](#). Volgistics also allows you to personalize email messages with email codes.

**Mailbox** - The communications center in Volgistics. The mailbox view is the same for all System Operators unless an account has Site Level Access enabled. In this case, operators only see information for their Site. The mailbox has In Box, Out Box, Applications, Service, Help E-mail, and Documents tabs.

**Mandate** - See Mandatory Service in this glossary for information.

### **Mandatory Service**

- A goal for volunteers to perform a certain amount of service for your organization within a specified date range. You can find more information [here \[pg:1419\]](#).

### **Menu**

- The items along the left side of your Volgistics account that direct you to certain areas of the program. You can find more information [here \[pg:0215\]](#).

### **Merit Hours**

- A way to adjust

service hours

recorded for volunteers automatically. Regular hours can be augmented for situations such as serving on a weekend, taking an overnight shift, or serving in a hard to staff Assignment. Or regular hours can be decreased to account for lunches or breaks. You can find more information [here \[pg:1564\]](#).

**Mobile VicNet Logo** - This is an image uploaded to Volgistics so that it appears on the mobile friendly view of VicNet. Please see Logo Graphic in this glossary for more information.

### **Month-to-date (MTD)**

- The month-to-date (MTD) total is the sum of all service hours entered for a volunteer from the first of the month to the current date in the month. For example, if it is March 22nd, the figure will represent a sum of service entries from March 1st to March 22nd for the volunteer. This figure can be added to the [Statistics box \[pg:1387\]](#) on the Core tab of the volunteer's record, and is available on the [Fields tab \[pg:0426\]](#) of most reports.

**MTD** - Please see Month-to-date (MTD) in this glossary for information.

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### **Non-Archived**

- A section of your database used to store

volunteer records

for your volunteers who are actively serving. Please note this is separate from a volunteer's

Status

. Non-archived and

archived

records can have any Status in your account regardless of the section of your database they are in. You can find more information on the differences between non-archived and archived records [here \[pg:0709\]](#).

## Notes Tab

- A tab on the volunteer record where you can add narrative text information about the volunteer. Information from

Comment Fields

on volunteer application forms is placed on the Notes tab. You can find more information on the Notes tab [here \[pg:1849\]](#).

**Notifications** - Please see Alerts in this glossary for information.

## Number

- A unique identification number found on the

Core tab

of the volunteer record. This number is used as the PIN when volunteers sign-in to the

VicTouch

module. If you'd like to send volunteers their PIN in an email message, you can do this with an email code. You can find more information about system settings for volunteer numbers [here \[pg:1856\]](#).

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## On-Demand

- In Volgistics,

*On-Demand*

refers to

schedule reminder

messages that are sent because a

System Operator

triggered the action. In most cases, schedule reminders are sent automatically by the system. You can find more information regarding On-Demand reminder messages [here \[pg:1396\]](#).

**One Day Only** - This refers to an opening or schedule entry that only takes place on one, specific date. It does not repeat on an ongoing basis. Please see Schedule in this glossary for more information.

**Ongoing** - This refers to an opening or schedule entry that takes place on a recurring, or repeated, basis. For example, a schedule entry that takes place on every Monday and Wednesday is said to take place on an *ongoing* basis. Please see Schedule in this glossary for more information.

**Online Forms** - Volgistics features that allow volunteers and potential volunteers to interact with your organization via the Internet. These include the Opportunity Directory, application forms, and the VicNet module.

**Opening** - Openings are used to create shifts, or pre-set times, when volunteers will serve. Openings can be setup to take place on just one specific date. Or, they can be setup to recur on an ongoing basis.

One opening can be setup to take place on multiple days and require multiple volunteers. For example, a single opening may take place every Monday, Wednesday and Friday and have 5 slots, or volunteers needed, on each of those days. You can find more information on creating openings [here \[pg:0776\]](#).

**Openings Only** - A term used to describe Assignments or schedule entries that require volunteers to serve specific times. You can setup the Rules tab of an Assignment to allow self-scheduling for *openings only* in Assignments that require volunteers to serve a certain shift. Please see Schedule in this glossary for more information.

**Opportunity** - Please see Assignment in this glossary for information.

### **Opportunity Directory**

- An online form that lists your Assignments and descriptions. You can find more information on this [here \[pg:0420\]](#).

### **Opt-out**

- To ensure the integrity of Volgistics email messages, we require that opt-out choices be sent with all email messages sent to more than one volunteer or Coordinator. You can find information on why this is important [here \[pg:0384\]](#). The recipient selects what email types they would like to receive. These choices are used to setup the volunteer or Coordinator's email preferences.

### **Order-Invoice**

- A bill used with the

pre-payment

method to start the payment process. Volgistics does not send Order-Invoices because each account holder selects the number of months (1 – 18) they'd like to pre-pay for as well as the

service level

they'd like. Volgistics automatically sends email notices that the renewal date is approaching to the account's

Billing Contact

at regular intervals starting 60 days from the paid through date. You can find information on how to create an Order-Invoice [here \[pg:0721\]](#).

**Out Box Tab** - A tab on your Volgistics mailbox where you can [send messages \[pg:0404\]](#), and view saved and sent messages.

Automatic messages

that have been sent do not appear on your Out Box tab. You can learn more about the Out Box tab [here \[pg:1978\]](#).

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**Password** - Part of the credentials that System Operators use to [login \[pg:0220\]](#) to the Volgistics system, and volunteers and

Coordinators

use to login to

VicNet



. The passwords are not the same as the

PIN

volunteers use to sign-in to

VicTouch

. System Operator passwords are initially created by the

Administrator

who creates the record. The initial volunteer and Coordinator passwords can be created in a variety of ways. You can learn more about volunteer and Coordinator passwords [here \[pg:1699\]](#).

## **PDF**

- A file format for Volgistics

reports

. PDF files can be opened with Adobe's

Acrobat Reader DC

program, the built-in PDF viewer in many web browsers, and outside programs designed to open this type of file. You can learn more about PDF files [here \[pg:0449\]](#).

## **Photo**

-

System Operators

can optionally upload photos of volunteers to the

Profile tab

of the volunteer record. The photos can also be uploaded by volunteers and Coordinators through the VicNet module. You can learn more about the photo feature [here \[pg:1798\]](#).

**Picture** - Please see Photo in this glossary for information.

**PIN** - Please see Number in this glossary for information.

## **Place**

- The middle tier, or level, in the

Site

, Place, and

Assignment hierarchy used to organize your assignment records. You can learn more about this structure [here \[pg:0096\]](#).

**PO** - Please see Purchase Order in this glossary for information.

**Position** - Please see Assignment in this glossary for information.

**Post** - For some, *post* may mean a job, task, or station that a volunteer serves at. In this case, see Assignment in this glossary for more information. In Volgistics, *post* means to add service information to volunteer records. You can learn more about this in the Service Entry definition in this glossary.

**Power User** - A user level that controls the amount of access the System Operator has in the account. To customize the access, the account's Administrator(s) setup the Field Rights and Tab Rights for the Power User operators.

### **Preference Field**

- Fields used to allow applicants or volunteers to express an interest in serving at certain

Sites

or

Places

, or in certain

Assignments. Preferences can also be setup for other things as well such as an Assignment Cluster, [state or province \[pg:1016\]](#), or one of the spare fields on the Assignment record. You can learn more about Preference Fields [here \[pg:1011\]](#).

**Preference Role** - Roles in Volgistics are used to show the volunteer's relationship, or standing, in a specific Assignment. The Preference Role is a default Role generally used to show that the volunteer has an interest in serving in an Assignment, but is not scheduled in the Assignment yet. If the Assignment Preference field is setup to automatically give a Role in an Assignment, it is commonly the Preference Role. Please see Role in this glossary for more information.

### **Pre-payment**

- A payment option for paying your Volgistics

Service Fee

by creating an

Order-Invoice

and then either mailing a check for payment, or paying the invoice by credit card. You can find more information [here \[pg:0733\]](#).

**Print** - Please see Reports in this glossary for information.

**Print Graphic** - This is an image uploaded to Volgistics so that it appears on PDF versions of reports that you generate. Please see Logo Graphic in this glossary for more information.

### **Prior Year Comparison**

- A field you can add to

Service Summary

reports to show hours served in the previous year for the time period listed in the report. The report automatically calculates the percentage of loss or gain between the two years. You can learn more about this [here \[pg:0575\]](#).

### **Profile Tab**

- This is a tab on

volunteer

and

assignment

records. For volunteers (not assignments), the tab contains information such as their Date of Birth,

photo

,

spare fields

, and

preference fields

. For volunteers

*and*

assignments, the tab can contain information such as the Daily Availability and Characteristic fields. You can find more information about the tabs on volunteer records [here \[pg:1849\]](#).

**Project** - Please see Assignment in this glossary for information.

**Prospect Status** - A default Status in Volgistics generally used to describe people who you have collected basic information from, but who have not started the steps to start volunteering (such as filling out an Application Form) yet. For example, if you have an open house you may collect the names and email addresses of guests and enter them as a volunteer in your database with the *Prospect* Status. This would allow you to send them invitations to apply to volunteer, while keeping them separate from your volunteers with the Active Status who are actively serving. Please see Status in this glossary for more information.

**Public Account Identifier** - A unique identification number for Volgistics accounts that is used to associate their VicNet or VicTouch access points with their account.

### **Purchase Order (PO)**

- A purchase order (or PO) is document used by the Accounts Payable departments of some organizations to indicate that they will be purchasing a product. Volgistics does not accept purchase orders as payment for

service fees

. If your organization requires you to use purchase orders as part of the payment process, you will need to wait for the check to be generated for the purchase order and then send the check to us. If it helps the payment process, you can add a purchase order number to an Order-Invoice. You can learn more about how to do this [here \[pg:0739\]](#).

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## **Receipt**

- A document showing that an

Order-Invoice

for Volgistics

service fees

has been paid. You can view, print, or save Receipts in the Volgistics Store for your account. You can learn how to do this [here \[pg:0722\]](#).

**Recognition** - Please see Awards in this glossary for information.

**Registration** - Please see Application Forms in this glossary for information.

**Regex** - Please see Regular Expressions in this glossary for information.

**Regular** - System Operators and Coordinators can put volunteers on the schedule on a repeating, or recurring, basis such as every Monday or every other Friday. Volgistics refers to a person who is scheduled like this as a *Regularly* scheduled volunteer.

**Regular Expressions** - Regular Expressions (or Regex for short) are not unique to the Volgistics system, but the *Search* fields on the column headings of the Volunteer Page support some Regular Expressions to help you search for records. You can find many resources to learn more about Regular Expressions on the Internet. One resource is RegexOne.

## **Reports**

- Volgistics includes reporting features you can use to retrieve information from your account. Reports can be generated in

PDF

or

Microsoft Excel

formatted files. Completed report files are sent to the

In Box tab

of your Volgistics Mailbox. They can be saved locally, or opened, from there. You can learn about the stock, or pre-made, reports in Volgistics [here \[pg:0595\]](#). You can learn about how to make custom reports [here \[pg:0467\]](#)

## **Role**

- The Role in Volgistics shows a volunteer's relationship to an

Assignment

. Having a Role in an assignment does not necessarily mean that the volunteer is

scheduled

in the assignment, or has

service

recorded in the assignment, although this is quite often the case. You can find more information about Roles [here \[pg:0103\]](#).

## **Roster**

-

*Roster*

is not a term that is used by Volgistics. Depending on where you are from geographically,

*roster*

can mean various things. If you use it to mean people who are scheduled, see

Schedule

in this glossary for more information. If you use *roster* to describe a list, roll, count, etc., you may need to [contact the support team \[pg:0184\]](#) and describe what you're looking for. The support team will gladly assist you with details on how to get the information you need.

## **Rules Tab**

- The Rules tab is located on

Assignment

records. It is used for things such as controlling which volunteers can

self-schedule

for the assignment, or whether volunteers can schedule for

any times

or for

openings only

. You can also setup self-scheduling alerts on the Rules tab. You can learn more about the Rules tab [here \[pg:2006\]](#).

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.

## **Schedule**

- In Volgistics, the schedule is used to record information about when you expect volunteers to serve in the future. Because of this, the schedule for past years is not available indefinitely so you should not depend on the schedule to show historical information about when volunteers served in the past. Instead, we recommend using

service entries

to record information about when volunteers served in the past. Please note that service entries are not

automatically created from the schedule--service must be put into the system using one of the methods shown [here \[pg:1568\]](#). You can find more information about the schedule feature in Volgistics [here \[pg:0746\]](#).

**Schedule Tab** - A tab on volunteer, Coordinator, Site, Place, or Assignment records that shows the schedule for that particular record. For example, a volunteer's Schedule tab will only show that volunteer's schedule, a Coordinator's Schedule tab will show the schedule for all assignments the Coordinator oversees, a Site's Schedule tab will show the schedule for all assignments that fall under the Site, etc.

**Schedule Entry** - The registration or recording of details for a volunteer's schedule. Schedule entries record the assignment, times or shift, date(s), and any special notes about when the volunteer is expected to serve. Schedule entries can be for one date only, or for a repeating (ongoing) pattern of dates such as every 2nd and 4th Tuesday of the month. Schedule entries can simply place the volunteer on the schedule, or they can place the volunteer on the schedule as filling an opening slot.

### **Schedule Icons**

- Schedule icons provide a quick visual way to see if an

opening

slot is

filled

by an

individual volunteer

or a group member, or if is still an unfilled opening slot. You can learn more about schedule icons [here \[pg:0756\]](#)

.

### **Schedule Reminders**

- Reminder messages sent by

Email

or

text

to

volunteers

and

Coordinators

. In most cases reminders are setup to be sent automatically by the system, but they can also be sent on-demand by System Operators. You can find more information on Schedule Reminder messages [here \[pg:0791\]](#).

### **Schedule Reports**

- These reports create PDF files with information about schedules in your account. You can find more information [here \[pg:0547\]](#).

## Secured-socket layer (SSL)

- An online encryption method Volgistics uses to scramble your account's information as it travels over the Internet. You can learn more about this [here \[pg:0181\]](#).

## Security Block

- A built-in security feature used to help safeguard your information. This feature automatically stops login attempt to your account if too many invalid login attempts have been made from the same IP address. You can learn more about this [here \[pg:1604\]](#).

## Self-Scheduling

- An account's

Administrator(s)

can configure the Volgistics account to allow volunteers to place themselves on the schedule

as long as either the

VicNet

or

VicTouch

module is included in the organization's service level. You can find more information on how to enable and configure self-scheduling [here \[pg:1494\]](#).

## Self-Scheduling Alerts

- A type of

alert

sent to

System Operators

and/or

Coordinators

to notify them that a volunteer has added or removed herself from the schedule. The alerts can be configured to be sent for just specific

assignments

. You can learn how to enable self-scheduling alerts in the *Self-scheduling alerts* section of help topic 2172 [here \[ \]](#).

## Sender ID

- An email authentication protocol designed to combat spam. Volgistics offers two different Sender ID settings depending on how your organization handles Sender ID. You can learn more about this [here \[pg:0311\]](#).

**Service** - Please see Service Entry in this glossary for information.

## Service Detail Reports

- Reports designed to show

service

information in your account. The reports can be run in Excel or PDF format. You can find more information on Service Detail reports [here \[pg:0560\]](#).

**Service Directive** - See Mandatory Service in this glossary for information.

**Service Entry** - The registration or recording of details for a volunteer's past service with your organization.

*Service entries* always record a date (or date range), and they can optionally record hours served, times served, the assignment the volunteer served in, and additional Service Measures that are setup.

The system will automatically calculate Merit Hours for the service entry if you have setup a rule that applies to the entry. In addition, service entries can be applied toward a Mandatory Service goal for the volunteer.

Service entries need to be created through one of the methods shown in help topic 1166 [here \[pg:1568\]](#). Service is not automatically entered based on the schedule. You can find more information about how service shows on a volunteer record [here \[pg:1579\]](#).

## Service Fee

- The payment required to use the Volgistics service at the

service level

you select for your account. Service fees are calculated by month, and you can select to make

automatic monthly payments

or pre-pay in advance for 1 to 18 months of service. You can learn more about Volgistics service fees [here \[pg:0710\]](#).

**Service Hours** - Please see Service Entry in this glossary for information.

## Service Level

- The maximums you choose for the number of

non-archived

volunteer records,

archived

volunteer records, and

System Operators

you can have in your account. Your



*service level*

also determines if your account has access to the optional VicNet, VicTouch, and VicDocs modules. You can find more information on this [here \[pg:0719\]](#).

**Service Mandate** - See Mandatory Service in this glossary for information.

### **Service Measures**

- Optional numerical fields you can setup to collect additional

service

information for things such as tours given, mileage driven, phone calls made, absences, visits, etc. You can find more information on Service Measures [here \[pg:1557\]](#).

### **Service Summary Reports**

- Reports designed to show

service

information in your account. The reports can be run in Excel or PDF format. You can find more information on Service Summary reports [here \[pg:0580\]](#).

**Service Tab (Mailbox)** - There is a Service tab on volunteer records and a Service tab on your Volgistics mailbox. This glossary item is for the mailbox. If you need information regarding the Service tab on volunteer records, see the Service Tab (Volunteer Record) item below.

The purpose of the Service tab on the mailbox is to allow System Operators review, edit, or delete service entries sent to be audited.

**Service Tab (Volunteer Record)** - There is a Service tab on volunteer records and a Service tab on your Volgistics mailbox. This glossary item is for the volunteer records. If you need information on the mailbox, see the Service Tab (Mailbox) item above.

The Service tab on volunteer records has three purposes. The top of the tab is where the Roles a volunteer has in assignments are recorded. There is more information on this [here \[pg:0138\]](#). The middle of the tab is where the volunteer's service information is recorded. You can find more information on this [here \[pg:1581\]](#). The bottom of the tab is where Mandatory Service for the volunteer is configured.

### **Service Values**

- You can assign a monetary value to be associated with

service

information. For example, Independent Sector (a Washington, D.C. based advocacy coalition) announced the U.S. average for volunteer service value was \$23.56 per hour in 2015. The group also releases averages for each State and you can learn more at [https://www.independentsector.org/volunteer\\_time](https://www.independentsector.org/volunteer_time). You can learn more about setting service values in Volgistics [here \[pg:0034\]](#).

### **Session**

- A Volgistics session starts when a

System Operator

correctly enters her or his

credentials

from the Login link at [www.volgistics.com](http://www.volgistics.com). Each operator can only have one active session at a time. So if one person is logged-in, and another person uses the same credentials to login, the first person's session will end. Sessions will also expire automatically when the system does not sense any activity by the operator for an extended period of time. You can learn more about this [here \[pg:1589\]](#).

## Set

- A Set is a way to query your account to identify certain volunteers. After a Set has been created, you can do various things with it such as view the volunteers in the Set, send a message to the volunteers in the Set, or run a report that only includes the volunteers in the Set. You can learn more about the Sets feature [here \[pg:0858\]](#).

## Set Rule

- A

*Set Rule*

is any aspect of the Volgistics system that can be used to build a Set to query your volunteer records. You can find a complete list of the *Set Rules* that are available [here \[pg:0853\]](#).

## Setup

- The

menu

option that allows

System Operators

to configure their account. Access to the Setup menu is usually only given to

Volgistics Administrator

level operators, but access can optionally be given to Power and Basic User level operators also. You can learn more [here \[pg:0887\]](#).

**Shifts** - See Opening in this glossary for information.

**Sign-in Station** - See VicTouch Sign-in Station in this glossary for information.

## Site

- The top tier, or level, in the Site,

Place

, and

Assignment

hierarchy used to organize an account's assignment records. You can learn more about this structure [here \[pg:0096\]](#).

## Site Level Access

- A Volgistics feature that allows

System Operators

to be restricted to a single

Site

. When this is in place, the operator will only see

Places

and

Assignments

that are underneath their Site. The operator will also only see volunteer records associated with their Site. You can learn more about this feature [here \[pg:0092\]](#).

**Site Level Operator** - A System Operator who is assigned to one particular Site when the account uses Site Level Access.

**Slot** - See Opening in this glossary for information.

## Spare Fields

- Fields that the account's

Administrator(s)

can customize to meet the organization's needs. You can learn more about what types of spare fields are available, what records they are available on, and more [here \[ \]](#).

**SSL** - See Secured-socket layer (SSL) for information.

## Start Date

- The date a volunteer starts actively serving with your organization. By default this is the first

Active Status

date recorded for the volunteer, but the account's

Administrator(s)

can configure the account to use different Statuses for this date. You can find more information on this [here \[pg:1890\]](#).

## Statistics Box

- A box on the bottom of the

Core tab

of

volunteer records

that shows service information about the volunteer.

Administrator(s)

can configure the

*Statistics box*

to show the volunteer's

Date of Last Activity

and

Years of Service

, along with

lifetime

,

year-to-date

, and

month-to-date

service hours. Administrator(s) can also select to add two floating subtotals for customizable date ranges. You can learn more about how to configure the Statistics Box [here \[pg:1387\]](#).

## **Statistics Reports**

-

Reports

designed to summarize volunteer information such as demographics and retention for your entire account. You can learn more about these reports [here \[pg:0593\]](#).

## **Status**

- A volunteer's

*Status*

in Volgistics shows their current relationship with your organization. For example, an

Applicant Status

generally means that the volunteer has completed an

application

, but is not approved to serve yet. While an

#### Active Status

generally means that the volunteer has completed any vetting you require and is now actively serving. You can learn more about Statuses and how they are used [here \[pg:1832\]](#).

#### Stock Reports

- These are pre-made, ready-to-run reports

designed to meet many common needs volunteer organizations have for reporting. In addition to

*stock reports*

, you can also create

custom reports

if you cannot find a stock report that meets your needs. You can learn more about the stock reports available in Volgistics [here \[pg:0595\]](#).

#### Stop Date

- The date a volunteer stops actively serving with your organization. By default this is the first

Inactive Status

date recorded for the volunteer, but

Administrator(s)

can configure the account to use different Statuses for this date. You can find more information on this [here \[pg:1890\]](#).

**Store** - Please see Volgistics Store in this glossary for information.

**Substitute Role** - Roles in Volgistics are used to show the volunteer's relationship, or standing, in a specific Assignment. The Substitute Role is a default Role generally used to show that the volunteer is available to fill in for other volunteers who cannot serve as scheduled. Please see Role in this glossary for more information.

#### System Operator

- A person who logs into the Volgistics account by using the

*Login*

button at [www.volgistics.com](http://www.volgistics.com). These are generally the leaders of the volunteer department. Operators have three different levels that are configured by the account's

Administrator(s)

. These are

Volgistics Administrator, Power User, and Basic User. You can find more information on System Operators [here \[pg:0065\]](#).

## **System Operator Page**

- The page where the account's

Administrator(s)

add, delete, and configure

System Operator

records for the account. Administrators control the user's

credentials

, as well as the operator's

user level

, the

menu items

the operator can access, the tasks or jobs the operator can perform, and whether the operator is a site level operator. You can find more information on the fields and settings on the System Operator Page [here \[pg:1895\]](#).

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## **Tab Rights**

- Tab rights give you the ability to hide certain tabs on volunteer records from System Operators with a certain user level. You can find more information on tab rights [here \[pg:1012\]](#). You may also want to see Field Rights in this glossary for more information.

## **Tags**

- Tags are a temporary way to identify a volunteer record (or a group of volunteer records). Once records are tagged, there are a variety of actions you can take. For example, you can change the

Status

of all the tagged records at once, or run a report for just the tagged volunteers. You can learn more about the Tags feature [here \[pg:1529\]](#).

**Tasks** - Tasks can mean a variety of things, but in most cases it is what the volunteers do to provide volunteer service. If this is the meaning you're using, please see Assignment in this glossary for more information.

## **Text Messages**

- Communication sent to your volunteers and/or Coordinators via text. You can find more information on text messages [here \[pg:1966\]](#).

**Tickler** - Tickler is an item on the Volgistics menu that provides a tool for System Operators to use to find volunteers who are need to complete a Checklist item or who are eligible to receive an Award. The term *Tickler* was used because it refers to a file or other aid used to remind someone of an upcoming event.

**Trainee Role** - Roles in Volgistics are used to show the volunteer's relationship, or standing, in a specific Assignment. The Trainee Role is a default Role generally used to show that the volunteer is learning to serve in an Assignment. Please see Role in this glossary for more information.

## Types

- Types provide a way to identify and categorize volunteer records. Types differ from

Flags

because a volunteer can only have one Type, but they can have multiple Flags. You can find more information [here \[pg:0212\]](#).

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## Unduplicated Volunteer Count

- A count available on

Service Detail

and

Service Summary

reports that shows how many volunteers have

service

information recorded during the time period the report covers. The count is

*unduplicated*

because it factors out situations such as one volunteer who has service recorded in two different Assignments under the same Place. You can learn more [here \[pg:0452\]](#).

**Unfilled Opening** - An unfilled opening slot means that a volunteer is still needed to serve in the shift the opening represents. Please note that one opening can have multiple slots (for instance if 5 volunteers are needed for the shift). So one opening may have unfilled slots even if volunteers are scheduled to fill other slots for the opening. You can use the schedule icons as a visual indicator of if the opening slot is filled or unfilled.

**User Level** - The amount of access that System Operators have to the system. The three user levels are Volgistics Administrator, Power User, and Basic User. By default, the user levels have about the same amount of access to the system. The Volgistics Administrator(s) customizes how much access each user level has by setting tab rights and field rights for the user level.

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**Values** - Please see Service Values in this glossary for information.

**Vic** - Vic stands for Volunteer Information Center. When Volgistics references *Vic* it means the item relates to one of the three optional modules (VicNet, VicTouch, or VicDocs), or a feature available in these modules such as Vic Mail.

## **Vic Graphic**

- Graphics or images used to represent things such as the tabs or buttons shown in the VicNet module. You can customize these to "brand" or personalize your account. You can find more information [here \[pg:1451\]](#). Your account may also have logo graphics. Please see Logo Graphic in this glossary for more information.

**Vic Mail** - Messages sent to volunteers through the VicNet or VicTouch modules. You can find more information [here \[pg:0315\]](#)

**Vic Self-Scheduling** - Please see Self-Scheduling in this glossary for information.

## **Vic Tab**

- A tab on the volunteer record where you can review a volunteer's access to the VicNet and VicTouch modules. You can find more information on the Vic tab [here \[pg:1810\]](#).

## **VicDocs**

- An optional module that you can add to your account's

service level

if you want to store electronic documents such as a photo release form a volunteer has signed. You can learn more about the VicDocs feature [here \[pg:1648\]](#).

## **VicNet**

- An optional module that you can add to your account's

service level

to allow volunteers to sign-in over the Internet to do things like update their contact information, view messages, see their current schedule, add or remove themselves from the schedule, view their past service, or enter new service information. You can learn more about this module [here \[pg:1724\]](#).

## **VicNet Mobile**

- A mobile friendly view of the

VicNet module

for volunteers who access VicNet on cell phones or tablets. You can learn how to enable and customize the mobile view [here \[pg:1934\]](#). You can find a guide to teach volunteers how to use VicNet mobile [here \[pg:1676\]](#).

## **VicTouch**

- An optional module that you can add to your account's

service level

to allow volunteers to clock-in and clock-out when they arrive and depart from your facility. The system automatically creates a

service entry

on the Service tab of the volunteer record when the volunteer signs-out. You can learn more about this module [here \[pg:1778\]](#).



## **VicTouch Sign-in Station**

- A computer or tablet that is setup to launch the

VicTouch

module. When VicTouch is included in your account's

service level

, you can set up as many sign-in stations as you need without impacting your monthly service fees. You can learn how to configure a computer to use as a sign-in station [here \[pg:1527\]](#).

## **Volgistics Administrator**

- A

System Operator

who generally has access to all aspects of the account. By default, the person who creates the account is the account's

*Administrator*

and this person can then create other operator records at any of the three levels:

*Volgistics Administrator*

, Power User, or Basic User. You can learn more about *Volgistics Administrator* level operators [here \[pg:0052\]](#).

**Volgistics Store** - Each account has a *Volgistics Store* that is used to arrange for payment of the account's service fees. The Store can only be accessed by Administrators for the account, or people who have the Accounting Access Code for the account. To get to the Store, go to [www.volgistics.com](http://www.volgistics.com), hover over *Try or Buy* on the menu, and select *Store*.

## **Volunteer and Assignment Matching**

- An optional feature that an account's

Administrator(s)

can enable that will help find volunteers who are a good fit to serve in an Assignment. You can learn more about this feature [here \[pg:0899\]](#).

## **Volunteer Count**

- Information about the number of volunteers in your account.

*Count*

can mean different things depending on the criteria you use to determine if a record qualifies. For example,

Administrators

can find the total number of

*records*

in the account by going to

Setup

, then

*Account management*

, and then *Account status*. Operators can also get counts for just records that meet certain criteria as shown [here \[pg:1815\]](#). Please note that group records will only count as *one* record for these two methods even though the group may represent many volunteers. Operators can also pull counts for volunteers who have service recorded in a specified date range with an unduplicated volunteer count. With this method, groups will show with the number of volunteers who performed the service, but there is not a way to factor out if the same volunteers from the group gave service more than once.

**Volunteer List** - Please see Volunteer Page in this glossary for information.

### **Volunteer List Reports**

- Reports designed to show information about

volunteer records

in your account. These reports are laid out in a table format and you can setup the report to be sorted in different ways such as by the volunteer's

number

,

Start Date

,

Date of Last Activity

, or

lifetime service hours

. The reports can be run in Excel or PDF format. You can find more information on Volunteer List reports [here \[pg:0692\]](#).

**Volunteer Number** - Please see Number in this glossary for more information.

### **Volunteer Page**

- This is also known as the

*volunteer list*

. This is the page you see when you select

*Volunteers*

from the top of the

menu. You can find information about how to control which fields appear as columns on the volunteer page [here](#)

[pg:1381]. You can find information about how to search for specific records on the volunteer page [here](#) [pg:1982].

## **Volunteer Profile Reports**

- Reports designed to show information about the

volunteer records

in your account in a directory type format. These reports are only available in

PDF

format and they are the only reports that can contain volunteer photos. You can find more information on Volunteer Profile reports [here](#) [pg:0703].

## **Volunteer Records**

- Your volunteer records are accessed from the

*Volunteer*

page

in your account. Volunteer records can be in the archived or non-archived section of your account. You can find information on how to find archived records [here](#) [pg:1817]. You can find information on how to find non-archived records [here](#) [pg:1982].

A volunteer record can represent one person (

individual records

) or multiple volunteers (

group records

). Group records only count as one record toward the cap set for your account's

service level

even though they represent multiple volunteers. Volunteer records can be created in a variety of ways as shown [here](#) [pg:1878]. You can learn more about the tabs and fields on volunteer records [here](#) [pg:1849].

**VolunteerWorks** - VolunteerWorks is Volgistics' legacy software. Support for this product ended in 2008 but we offer free conversions to Volgistics for organizations who are still using VolunteerWorks. You can learn more about this at <https://www.volgistics.com/VolunteerWorks-conversion.htm>.

## **Volunteers Tab**

- The Volunteers tab is a tab on

Site

,

Place

Assignment

, or

Coordinator

records. The purpose of the tab is to show volunteers associated with Assignments through a

Role

in the Assignment. If you use the optional

Volunteer and Assignment Matching

feature, the Volunteers tab on Assignment records can also show volunteers who match the Assignment's criteria. You can learn more about the Volunteers tab on a Site record [here \[pg:0122\]](#). To learn about the tab on a Place record, click [here \[pg:0127\]](#). And, to learn more about the tab on an Assignment record, click [here \[pg:0131\]](#).

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## **Web Browser**

- A web browser is an app or software you have on your computer or device that allows you to access the Internet. Approved web browsers for Volgistics include Chrome, Firefox, Internet Explorer (9 or higher), and Safari. You can learn more about web browsers and other system requirements for Volgistics [here \[pg:0179\]](#).

## **Welcome Page**

- The Welcome Page or screen is the first page

System Operators

see after they

Login

to Volgistics. Operators also see the page if

*Welcome*

is selected from the

Volgistics menu

. The Welcome page shows announcements from the Volgistics Team, account status information, and a

*Tip of the Week*

highlighting aspects of Volgistics that System Operators may be unaware of. Additionally,

Administrators

can setup the Welcome page to show statistics about the account and a list of volunteer birthdays. You can learn more about the statistics box [here \[pg:0028\]](#) and the birthday list [here \[pg:1385\]](#).

## **Who's Here**

- The Who's Here page or screen is displayed if

System Operators

select

*Who's Here*

from the

Volgistics menu

. The main purpose of the page is to show which volunteers are currently signed-in to the

VicTouch module

. The page can also be setup to show volunteers who were signed-in previously during the day, volunteers scheduled for the day, or unfilled opening slots. You can learn more about the Who's Here page [here \[pg:1772\]](#).

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*No entries under X*

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## **Year-to-date (YTD)**

- The year-to-date (YTD) total is the sum of all service hours entered for a volunteer from the first of the year to the current date in the year.

*Please note that "year" can mean either the*

*calendar year*

*or the*

*fiscal year*

*depending on how you have your account configured.*

For example, if the current date is September 15th and your account does not have a fiscal year set, the YTD figure will be all hours given from January 1st to September 15th. However, if the current date is September 15th and your account is set to have a fiscal year that starts June 1st, the YTD figure will be all hours given from June 1st to September 15th. The YTD figure can be added to the [Statistics box \[pg:1387\]](#) on the Core tab of the volunteer's record, and is available on the [Fields tab \[pg:0426\]](#) of most reports.

## **Years of Service**

- Years of service is the amount of time volunteers have been with your organization. In Volgistics, the system automatically calculates this total based on the volunteer's

Status

dates. By default, only time in the

Active Status

is counted, but account holders can configure different Statuses to count toward the total as well. You can find more information on this [here \[pg:0077\]](#).

**YTD** - Please see Year-to-date (YTD) in this glossary for information.

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## How to Use the Email HTML Editor

Help topic 1024

Added or revised 04-28-2014

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This help topic gives instructions for the features in the HTML Email Editor. For instructions on how to send an email message to your volunteers and [Coordinators \[pg:0163\]](#), please see [help topic 2195 \[pg:0404\]](#). You can also send Vic mail and text messages to volunteers and Coordinators. Please see [help topic 1127 \[pg:0315\]](#) for information on sending Vic mail messages. [Help topic 1295 \[pg:0343\]](#) shows how to send text messages.

Click on a link in the Content window below to be taken directly to that section of the Help topic.

### Content

Preview

Cut, Copy & Paste Options

Undo & Redo

Find & Replace

Select All

Link & Unlink

Image

Table

Insert Horizontal Line

Smiley

Insert Logo

Font Name & Size

Text and Background Color

Bold, Italics, Underline & Strike Through

Remove Format

Insert/Remove Numbered or Bulleted List

Decrease or Increase Indent

Block Quote

**Preview**



Click the

### Preview

button to open your message in a new browser window to preview how it will look. If your message does not appear as expected, you can close the window to return to the HTML Editor to make changes. In the majority of cases, recipients will see the same thing as you see when they receive your message. However, because there are not standards in place for how each email provider interprets HTML commands, there are some cases where a recipient's message will appear different from what you sent. [Help topic 1028 \[pg:0299\]](#) explains more about this.

### Cut, Copy & Paste Options

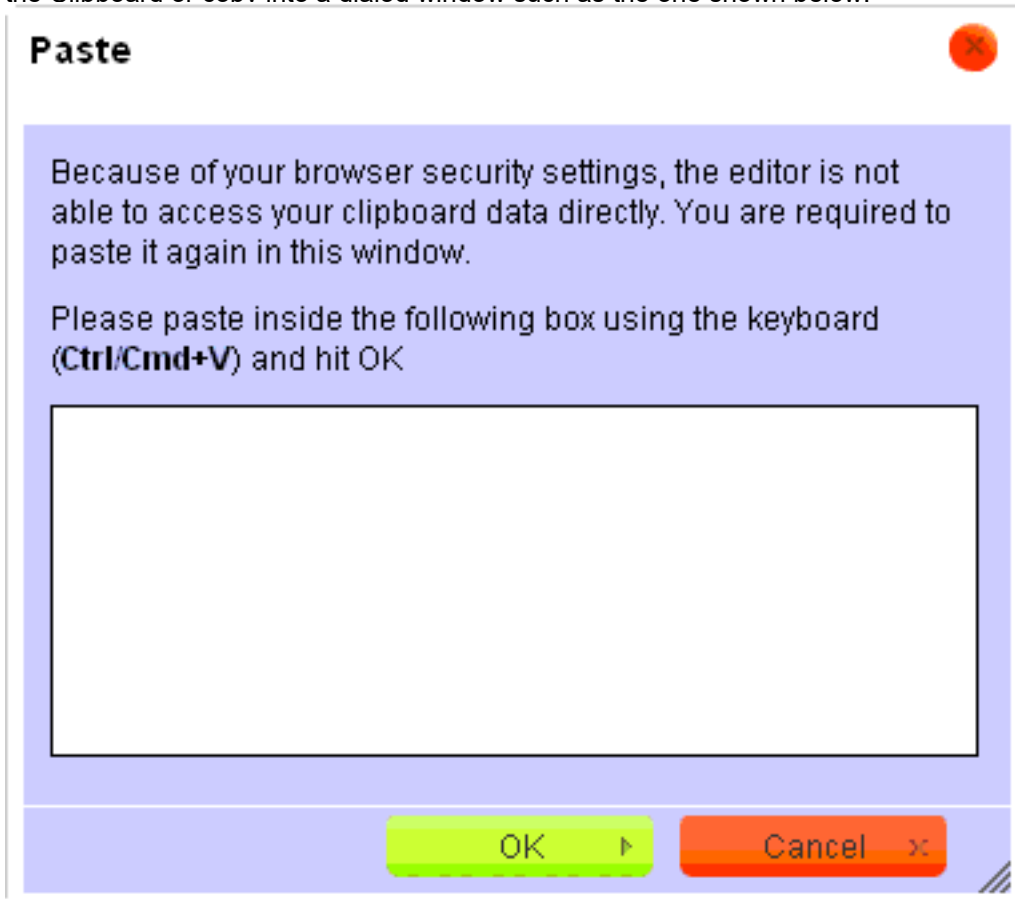


**Please note:** The Cut, Copy & Paste Options work with your operating system's Clipboard. In many cases your web browser's security settings may prevent Internet based programs (such as Volgistics) from accessing this directly. If the browser's security settings prevent access, clicking the buttons will not work. However, the keyboard shortcuts for the operation will work. See below for more information on the keyboard shortcuts for each button. You can also choose to bypass the buttons altogether and use the keyboard shortcuts directly in the message window.

Cut. The **Cut** button will not appear enabled unless there is text highlighted in your message. The keyboard shortcut for this button is holding down the Control (CTRL) or Command (CMD) key, plus the X key, at the same time.

Copy. The **Copy** button will not appear enabled unless there is text highlighted in your message. The keyboard shortcut for this button is holding down the Control (CTRL) or Command (CMD) key, plus the C key, at the same time.

Paste. Depending on your web browser's security settings, the **Paste** button may require you to allow access to the Clipboard or copy into a dialog window such as the one shown below:



If you're prompted to do this, place your cursor in the window and use the keyboard shortcut of holding down the Control (CTRL) or Command (CMD) key, plus the V key, at the same time to paste. Click the **OK** button to move the information to your message or the **Cancel** button to stop the operation.



Paste as plain text. Use the **Paste as plain text** button if you're pasting text that you do not want formatted as it appeared in the word processor or other source it was copied from. For example, text that appeared in bold format and was underlined (**sample**) will appear as plain text (sample) in your message when this button is used.

Depending on the web browser you're using, you may be promoted to allow access to your Clipboard, or be required to use a dialog window such as the one shown above to complete the operation. See the *Paste* section above if you need help doing this.

Paste from Word. Use the **Paste from Word** button to paste text that is formatted the same as the way it appeared in your word processor. This feature will copy the formatting of the font, but not the font itself, into your new message. For example, if your text was in the Verdana font and italicized when it was copied, the pasted text will be italicized but will not be in the Verdana font. This feature also works with bulleted and numbered lists, tables and hyperlinks. But it will not work to transfer things like text colors or text that is highlighted with a color. These will appear in the default color and without highlighting once they are transferred.

**Please note:** The browser you're using may also have an impact on how the **Paste from Word** button works. For example, the Google Chrome browser did not place numbered and bulleted lists in the message with the formatting they had in the document they were copied from.

Depending on the web browser you're using, you may be promoted to allow access to your Clipboard, or be required to use a dialog window such as the one shown above, to complete the operation. See the *Paste* section above if you need help doing this.

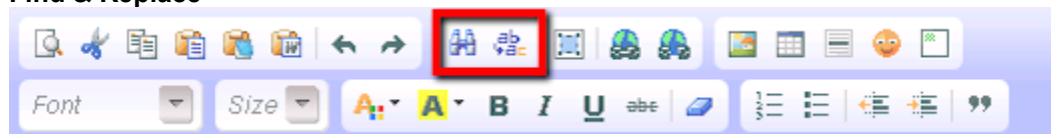
#### Undo & Redo



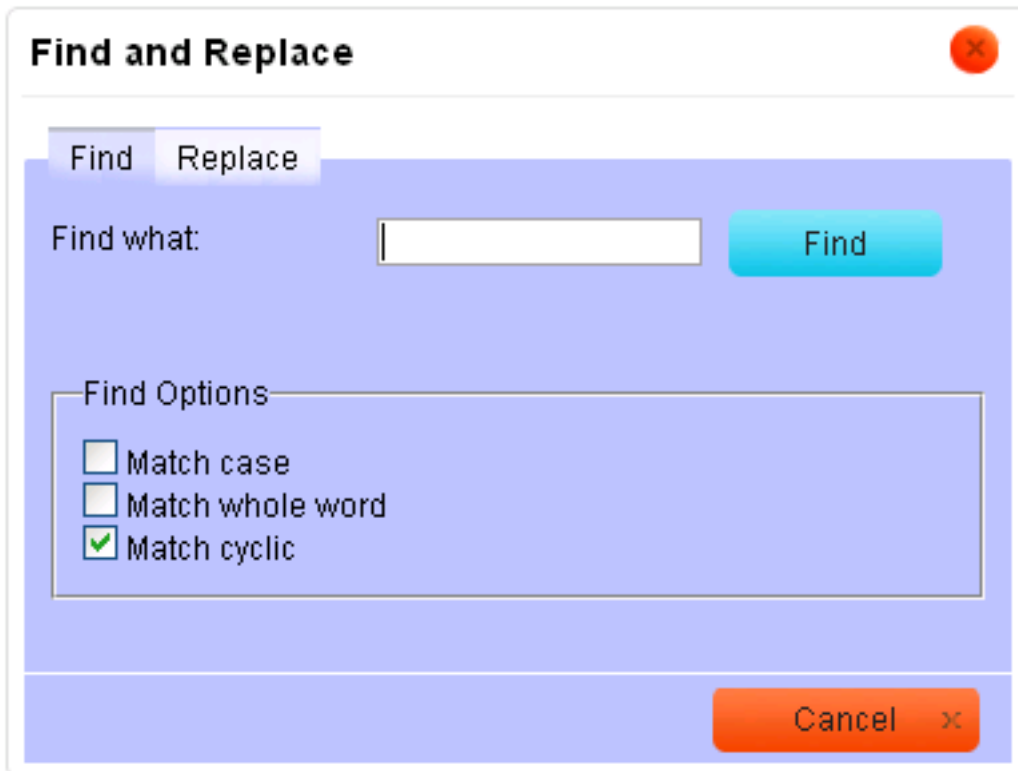
Undo. Use the **Undo** button as a quick way to change your message back to how it was before your last action was performed. You can also use the keyboard shortcut for this button by holding down the Control (CTRL) or Command (CMD) key, plus the Z key, at the same time. The HTML Editor stores approximately 20 steps that can be undone using the **Undo** button.

Redo. The **Redo** button provides a quick way to change your message back to how it appeared before the last undo operation was performed. The HTML Editor stores multiple steps so you can usually go forward any many times as needed to change your message back to how it was. The keyboard shortcut for this button is holding down the Control (CTRL) or Command (CMD) key, plus the Y key, at the same time.

#### Find & Replace

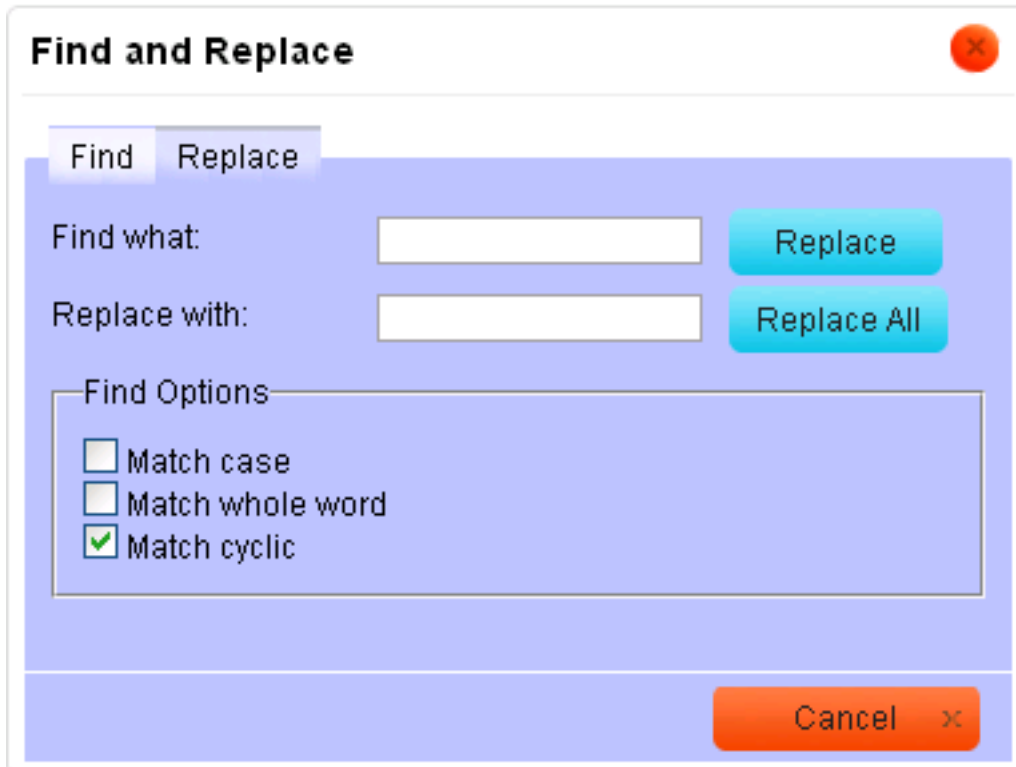


Find. The **Find** button allows you to quickly search your message for a specific word or phrase. Clicking this opens a dialog window like the one that appears below:



To use this, type the word or phrase you're looking for in the *Find what* field then click the **Find** button. When the word or phrase is found, the matching text in your message will be highlighted. Click the **Find** button again to move to the next instance of matching text in the message. See the *Find Options* section below for information on using the settings in the Find Options section of the tab.

Replace. The **Replace** button allows you to quickly replace a word or phrase in your text with a new word or phrase. Clicking this opens a dialog window like the one that appears below:



To use this, type the word or phrase you're looking for in the *Find what* field and the word or phrase you want to replace it with in the *Replace with* field.

When you click the **Replace** button on the tab, it will locate the word or phrase you searched for and highlight it in your message. If you click the button again, it will replace the highlighted text with your replacement text. When you click the **Replace All** button, every instance of the word or phrase is replaced at the same time. When finished, a message box will appear to let you know how many occurrences of the word or phrase were replaced. See the *Find Options* section below for information on using the settings in the Find Options section of the tab.

Find Options. The Find and Replace dialog windows also have the following options that allow you to customize your search.

*Match case*: Check this box to make the search case sensitive. For example, when this box is checked searching for "sample" will locate all of the times the word "sample" appears in your message except when it appears with uppercase letters such as "Sample" or "SAMPLE." Leaving the box un-checked will locate "sample," "Sample," and "SAMPLE" in your message.

*Match whole word*: Check this box to search for the entire word only. For example, when this box is checked searching for "sample" will locate "sample" in the document, but not "sampled."

*Match cyclic*: This box is checked by default to make the search continue through the entire document. For example, if the **Find** or **Replace** button was clicked midway through the document, the search will start at the beginning of the document once the end has been reached. Un-checking this box will cause the search to stop when the end of the document is reached.

### Select All



If you need to make changes to all of the content in your message at once, click inside the HTML editor window and then click the **Select All** button. This will highlight all text, images, and tables in the editor so you can apply the desired changes to everything at once.

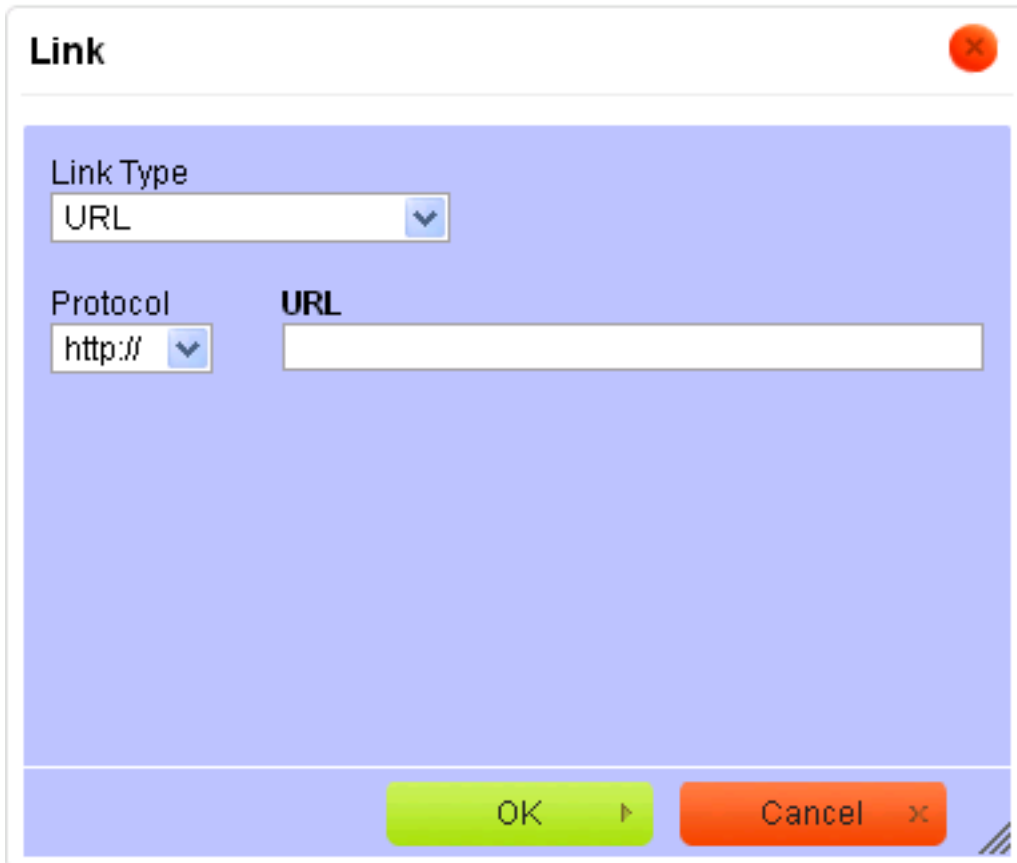
#### Link & Unlink



You can insert clickable hyperlinks for web pages and email addresses into your messages. To do this, click the **Link** button or use the keyboard shortcut of holding down the Control (CTRL) or Command (CMD) key, plus the L key, at the same time. If you want the link to be assigned to a text fragment, highlight the fragment before clicking the button. To remove a clickable link, highlight the text and then click the **Unlink** button.

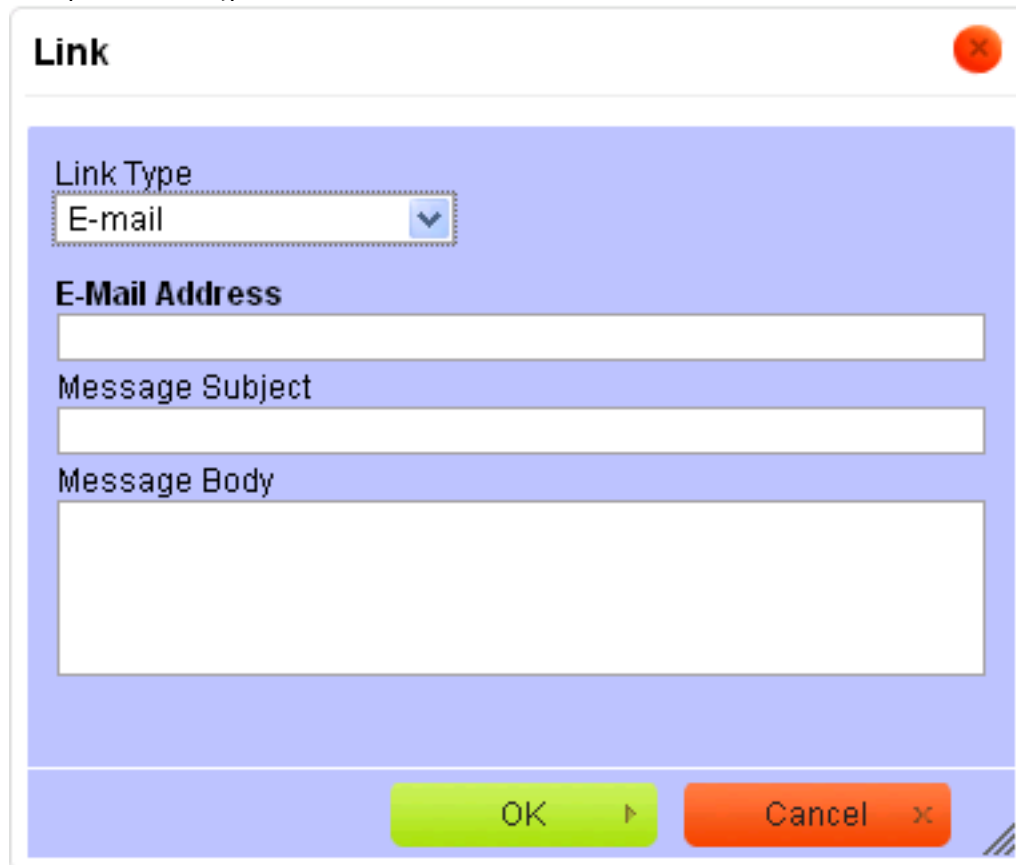
If you need to link to a web page follow the directions in the *URL Link Type* section. To link to an e-mail address, follow the directions in the *E-mail Link Type* section.

URL Link Type. By default, the dialog window opens as shown below with the URL Link Type selected:



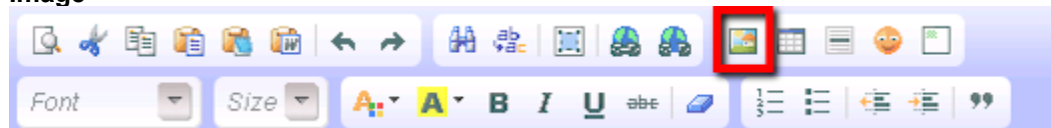
Type or paste the address you want the recipient to be directed to in the *URL* field. If necessary, select the communication protocol from the *Protocol* dropdown. You can choose from *http://*, *https://*, *ftp://*, *news://* or other as protocols. Click the **OK** button to exit the dialog window with the settings saved. Click the **Cancel** button to exit without saving the changes.

E-mail Link Type. To insert a clickable link to an e-mail address, select E-mail from the Link Type dropdown. This will open the dialog window shown below:



Enter the e-mail address you want the link to go to in the *E-Mail Address* field. You can also enter any text you want in the *Message Subject* and *Message Body* fields. This will automatically appear in the corresponding fields when the recipient clicks the link. They will be able to change, or add to, any text used before the message is sent. Click the **OK** button to exit the dialog window with the settings saved. Click the **Cancel** button to exit without saving the changes.

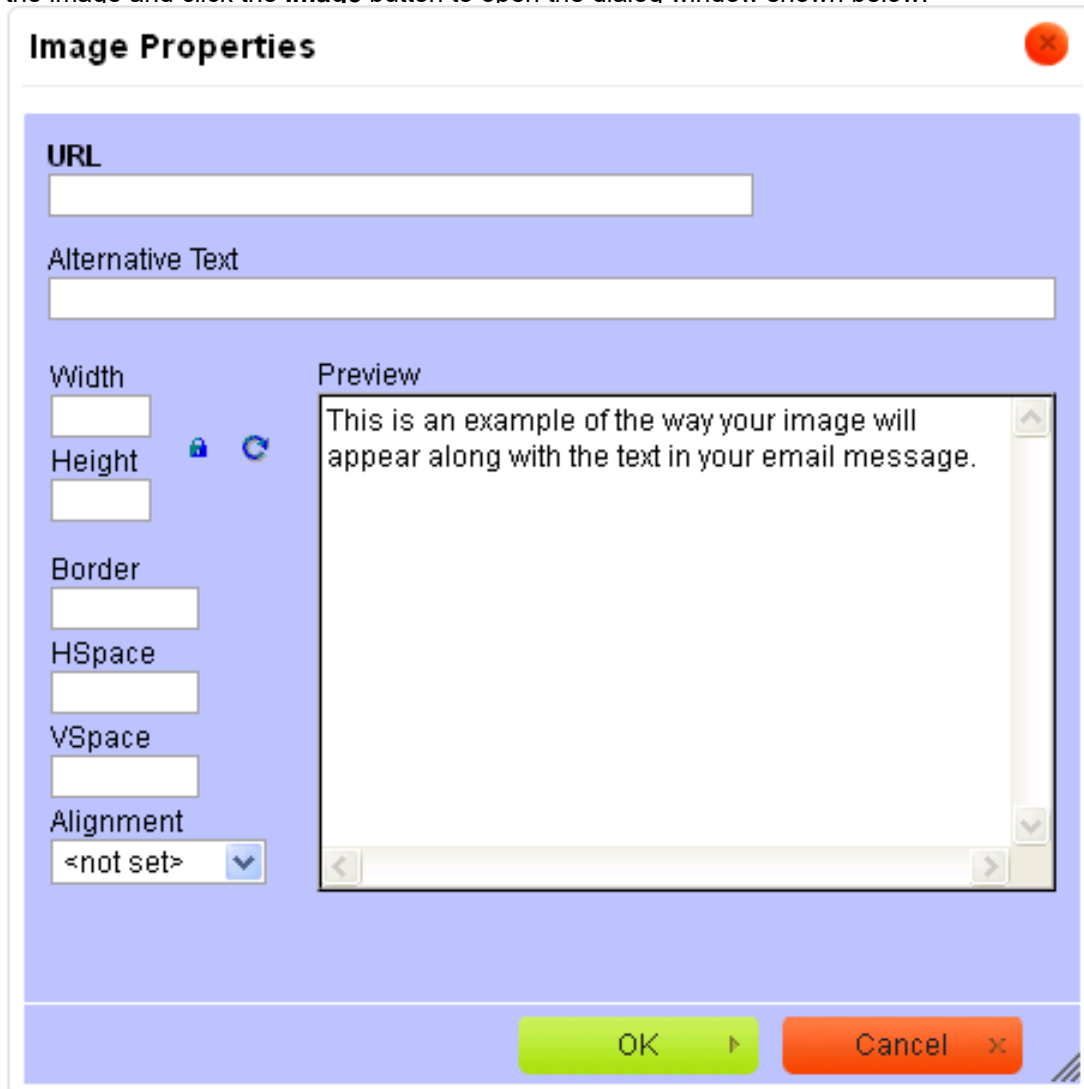
### Image



To insert an image in your message, you will first need to have the image stored at a photo hosting site such as Flickr, Imgur or Photobucket. These services are free to use for the basic user. You can click on the links above for information on how to start an account and upload your photos.

**Please note:** If you're a large organization and expect many recipients to view the photo, you may need to have a paid account depending on the policies regarding bandwidth use from the hosting site you choose. Most sites are reasonably priced for unlimited bandwidth use, though. Any charges for this would be totally separate from your Volgistics account. For more information, see the hosting site's web page.

After your photo is stored on a hosting site, place your cursor in the message window wherever you want to add the image and click the **Image** button to open the dialog window shown below:



To find out more about a particular field on the dialog window, see the corresponding section below.

URL. Type or paste the URL address for the direct link to the image you want in the *URL* field of the dialog window. The image below shows an example of where to find this for the Photobucket image hosting site:



Depending on which image hosting site you use, and your settings for that site, what you see may appear differently. Also, the name of the field for the link you need to copy may be different than *Direct link*.

**Alternative Text.** Enter a short description for the image in this field. If the recipient of the message has an assistive device such as a screen reader, this description will be used to tell the recipient more about the image.

**Width.** You can change the width of the image in your message by entering a number (in pixels) for the width you'd like for the image. By default the width to height ratio is locked. To edit these fields independently, click the **Lock Ratio** icon that appears as a padlock beside the field. You can also return your image to its original size by clicking the **Reset Size** icon.

**Height.** You can change the height of the image in your message by entering a number (in pixels) for the height you'd like for the image. By default the width to height ratio is locked. To edit these fields independently, click the **Lock Ratio** icon that appears as a padlock beside the field. You can also return your image to its original size by clicking the **Reset Size** icon.

#### Border

. To add a border to your image, enter a number (in pixels) for how wide you'd like the border. The border's color is controlled by whatever you have set as the default text color for HTML email styles on the [Email Ground Rules page \[pg:1930\]](#).

**HSpace.** You can change the horizontal space (or margin) between the image and the text that surrounds it on both sides by entering a number (in pixels) for how large you want the space.

**VSpace.** You can change the vertical space (or margin) between the image and the text that is above and below it by entering a number (in pixels) for how large you want the space.

**Alignment.** To change the alignment, or justification, of the image in your message, select Right or Left from the dropdown list.

### Preview

. The

*Preview*

field allows you to see how any changes you make to your image will appear without returning to the message window. Please note that if you select to include a border, this will appear black in the Preview field. However, once you ok the settings the border will appear as whatever color your default text is on the [Email Ground Rules page \[pg:1930\]](#).

Once you have your image setup how you want it, click the **OK** button to exit the dialog window with the settings saved. Click the **Cancel** button to exit without saving the changes.

### **Table**



The

### **Table**

button is used when you want to add a new table to your message. If you already have a table in your message and want to modify it, please see [Help topic 1199 \[pg:0317\]](#) "How to Modify a Table in an HTML email Message."

To add a table to your message, position your cursor in the message window where you want the table to be and then click the **Table** button. This opens the dialog window shown below:



**Table Properties**

**Rows**  
3

**Columns**  
2

**Width**  
500

**Height**

**Headers**  
None

**Border size**  
1

**Cell spacing**  
1

**Cell padding**  
1

**Alignment**  
<not set>

**Caption**

**Summary**

OK Cancel

To find out more about a particular field on the dialog window, see the corresponding section below.

### Rows

. Enter the number of rows your table will have. If you're not sure, use the default number of three. You'll be able to add or delete rows later by following the directions in [Help topic 1199 \[pg:0317\]](#).

### Columns

. Enter the number of columns your table will have. If you're not sure, use the default number of two. You'll be able to add or delete columns later by following the directions in [Help topic 1199 \[pg:0317\]](#).

Headers. Use the dropdown to select whether or not the first row, first column, or both should be in bold print and centered.

Border size. Enter a number in pixels for the size of the border that should appear around your table. By default this is set to one.

Alignment. Use the dropdown to select whether your table will appear aligned to the left or right, or appear centered, in your message. If the dropdown is not changed from the "not set" option, the table will be aligned to the left.

**Width.** Enter a number in pixels for the width of the table. You can also enter a percentage value for how much of the editing window you want the table to occupy, such as 80%. The default value of 500 is in pixels.

**Height.** Enter a number in pixels for the height of the table.

**Cell spacing.** Enter a number in pixels for how much space should be between individual cells and table borders.

**Cell padding.** Enter a number in pixels for how much space should be between the text in a cell and its borders.

**Caption.** You can enter a label for the table. The label will be displayed on top of the table in your message.

**Summary.** You can enter a summary for what information is in the table. If the recipient of the message has an assistive device such as a screen reader, this summary will be used to tell them more about the table.

### Insert Horizontal Line



Click the **Insert Horizontal Line** button to add a horizontal line feature to your message. The line will be inserted in the spot your cursor is currently placed at in your message window. When the recipient views your message, the line automatically adjusts to span from one side of the recipient's message window to the other. There are not any options available to change the thickness, or color, of the horizontal line element.

To delete a line that is in your message, place your cursor immediately before or after the line and press the Delete or Backspace key on your keyboard.

### Smiley



Click the **Smiley** button to add an emoticon image to your message. The image will be placed in the spot your cursor is currently at in your message window. When this button is clicked, it will open a dialog window showing all of the choices available. Use your mouse to click on the image you want to add to your message. There is not a way to add new emoticon images to the selections available. Click the **Cancel** button to close the dialog window without selecting an image.

To delete an emoticon image that is in your message, place your cursor immediately before or after the image and press the Delete or Backspace key on your keyboard.

You can also edit the alternative text, size, border, margins and justification of the emoticon image in your message. To do this, right click on the image in your message and select Image Properties. This will open a dialog window similar to the one shown in the Image section of this help topic above.

### Insert Logo



## Please note

: The

### Insert Logo

button will only appear if you have an image uploaded to use on your online forms. If you have not done this, [Help topic 1187 \[pg:1353\]](#) shows how to do this under the "To upload your display graphic" heading.

To add your logo to your message, place your cursor in the message window where you want the logo to appear and click the **Insert Logo** button. To delete a logo image that is in your message, place your cursor immediately before or after the image and press the Delete or Backspace key on your keyboard.

You can also edit the alternative text, size, border, margins and justification of the logo image in your message. To do this, right click on the image in your message and select Image Properties. This will open a dialog window similar to the one shown in the Image section of this help topic above.

### Font Name & Size



When you start your email message, the font and size for the signature block (if one is included) is determined by what you have selected as the default settings on the [Email Ground Rules \[pg:1930\]](#) page. To add, or change, the signature block for your System Operator record, you will need to go to the [System Operator \[pg:1895\]](#) page and update the information under Email heading.

**Font Name.** To change the typeface for the text in your message, highlight the text you want to change and select the font you'd like from the **Font Name** dropdown list. To make selecting a font easier, the names of the choices appear in the font they represent. The editor has the following fonts available: Arial, Comic Sans MS, Courier New, Georgia, Lucida Sans, Tahoma, Times New Roman, Trebuchet MS, and Verdana. There is not a way to add additional fonts to the choices.

**Font Size.** To change the size of the typeface for the text in your message, highlight the text you want to change and select the size you'd like from the **Font Size** dropdown list. To make selecting the size easier, the size of the numbers appears as the font size they represent. The font sizes available range from 8 pixels to 72 pixels. It is not possible to add additional sizes to the choices.

To return your text to the default font and size, highlight the text and click the **Remove Format** button. You can find out more about this in the Remove Format section of this help topic that appears below.

### Text & Background Color

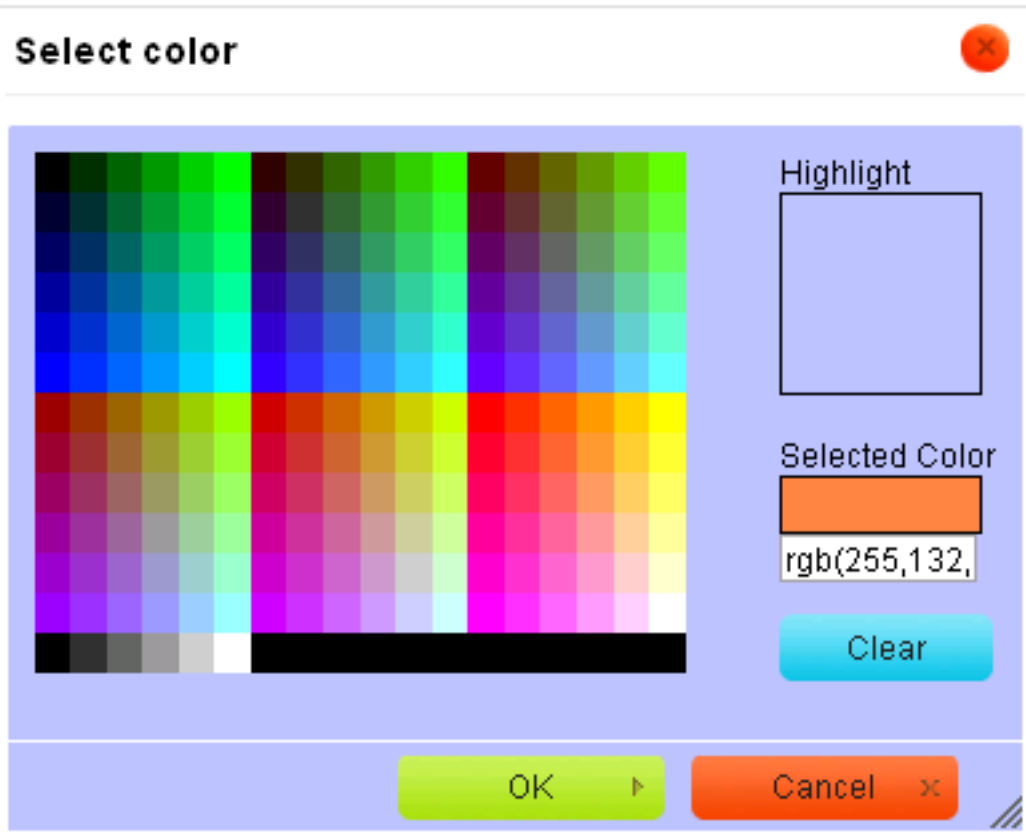


When you start your email message, the font color for the signature block (if one is included) is determined by what you have selected as the default setting on the [Email Ground Rules \[pg:1930\]](#) page. To add, or change, the signature block for your System Operator record, you will need to go to the [System Operator \[pg:1895\]](#) page and update the information under Email heading.

**Text Color.** To change the color of the text in your message, highlight the text you want to change and select the **Text Color** button. Click on the color square for one of the 40 basic color choices. The highlighted text is automatically changed to your color choice. If the color you want is not shown, click the More Colors option. See the *More Colors* section below for information on creating custom colors.

**Background Color.** To change the color that appears behind the text in your message, highlight the text you want to change and select the **Background Color** button. Click on the color square for one of the 40 basic color choices. The highlighted text is automatically changed to have your background color choice. If the color you want is not shown, click the More Colors option. See the *More Colors* section below for information on creating custom colors.

**More Colors.** When you select the More Colors option, it opens a dialog window like the one shown below:



Click on a color square and then the **OK** button to change the text or background color to your choice. You can also create custom colors by entering a color value into the text box below Selected Color. The color value must be in one of the following formats:

1. rgb(nn,nn,nn) - Where nn is a color value on a scale of 0 to 255 and the first set of numbers is the red channel, the second set is the green channel and the third set is the blue channel. Do not put spaces between the "b" and the "(" character, or after the commas for your red, green and blue channel values.
2. #nnnnnn - Where each nn pair is a hexadecimal number representing the red, green and blue channel color values.

After entering the value in the text field, click the **OK** button to apply the color to your selected text. Click the **Cancel** button to exit the dialog window without applying the choice.

To return your text to the default color, or remove the background color, highlight the text and click the **Remove Format** button. You can find out more about this in the Remove Format section of this Help topic.

### Bold, Italic, Underline & Strike Through



To add emphasis to text, highlight the text and then click the **Bold**, **Italic**, **Underline** or **Strike Through** buttons to add the selected format to the text. You can apply more than one format to selected text by leaving the text highlighted and clicking an additional button. For example, to make text both bold and underlined, highlight the text you need and then click the **Bold** and then **Underline** buttons.

To remove applied formats from text, highlight the text and then click whichever buttons correspond to the format. The buttons for the formats that apply will appear enabled on the Editor's menu bar. For an alternative way to remove formatting, see the *Remove Format* section below.

You can also use the following keyboard shortcuts instead of clicking the buttons:

**Bold.** Hold down the Control (CTRL) or Command (CMD) key, plus the B key, at the same time.

**Italic.** Hold down the Control (CTRL) or Command (CMD) key, plus the I key, at the same time.

**Underline.** Hold down the Control (CTRL) or Command (CMD) key, plus the U key, at the same time.

**Strike Through.** There is not a keyboard shortcut for available for Strike Through text.

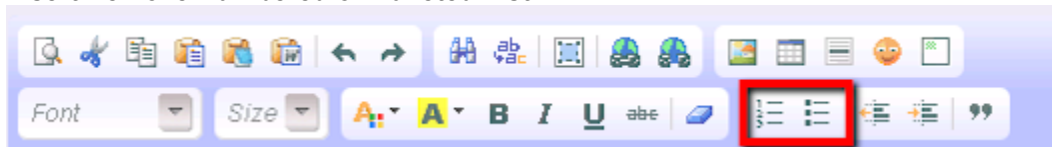
### Remove Format



The

**Remove Format** button can be used to quickly return text to the default font, size and text color selected on the [Email Ground Rules \[pg:1930\]](#) page. It will also remove any formatting such as background colors, or bold, italics, underlining or strike through text features. To remove formatting, just highlight the text you want to remove the formatting from, and then click the button.

## Insert/Remove Numbered or Bulleted List



To add a numbered or bulleted list to your message, position the cursor where you want the list to appear in your message and then click the **Insert/Remove Numbered List** or **Insert/Remove Bulleted List** button. The cursor will automatically be indented after a list marker so you can type the first item on your list. Just press the Enter key on your keyboard to move to the next item on your list. When your list is done, press the Enter key and then the **Insert/Remove Numbered List** or **Insert/Remove Bulleted List** button to start your next line of text in the normal position.

To remove the numbered or bulleted list formatting while keeping the text that appears in the list, highlight the list in your message and then click the **Insert/Remove Numbered List** or **Insert/Remove Bulleted List** button. To remove the list completely, highlight the list in your message and press the Delete key on your keyboard.

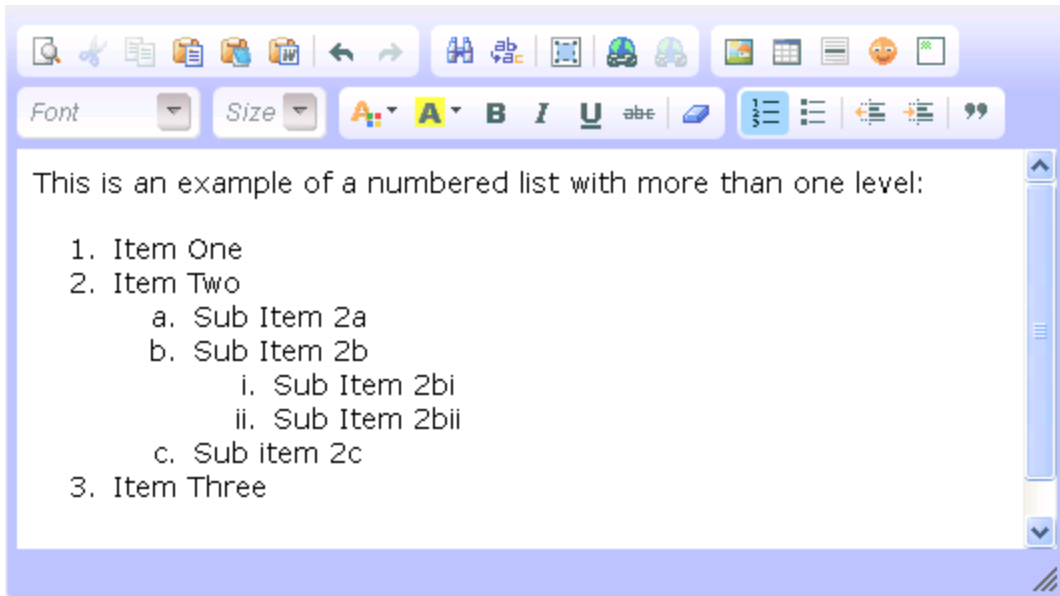
List Properties. You can change the default markers used in your lists by highlighting and right clicking the completed list in your message. Select *Numbered List Properties* or *Bulleted List Properties* from the list that appears to open a properties dialog box.

The Numbered List marker options include Lower Roman (i, ii, iii, iv, etc.), Upper Roman (I, II, III, IV, etc.), Lower Alpha (a, b, c, d, etc.), Upper Alpha (A, B, C, D, etc.), and Decimal (1, 2, 3, 4, etc.). The default marker setting is Decimal if the "not set" option is selected. You can also change the starting marker used by changing the number in the *Start* field. For example, if you used the Lower Alpha option and set the number in the *Start* field to 3, your list would begin with the "c" character.

The Bulleted List marker options include Circle, Disc and Square. If the setting is left at "not set," the default marker option is Disc.

Nested Lists. If you'd like your numbered or bulleted list to have more than one level, place the cursor in the line that will start the secondary level and click the **Increase Indent** button. When you're done with the secondary level, press the Enter key and then click the **Decrease Indent** button to start your next line at the primary level again. If you need help with this, please see the *Decrease or Increase Indent* section below in this Help topic.

You can also give just the secondary level(s) of your list a new marker scheme. To do this, highlight the level of the list and then follow the directions in the *List Properties* section above. This is an example of how a numbered list with 3 levels would use different marker schemes:



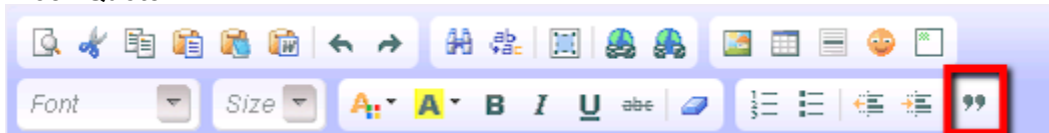
### Decrease or Increase Indent



You can indent sections of text by using the **Increase Indent** button. To use this, place your cursor before a line of existing text, or at the start of a blank line. The text will be indented one tab space for each time you click the button so you can create multiple levels if you wish.

To return to the original level, place the cursor in front of the line you want to have back at the original level, or at the start of a blank line, and click the **Decrease Indent** button.

### Block Quote



The **Block Quote** button allows you to indent text on both the left and right sides. This can be used to offset paragraphs of text that are cited from a source, or to make lines of text appear as centered headlines. To use this, place the cursor where you want the text to be and then click the button. Or you can highlight an existing section of text and click the button. When you're done with the sections you want formatted, click the Enter key on your keyboard and then click the **Block Quote** button to return to normal formatting.

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## HTML Email Messages

Help topic 1026

Added or revised 05-03-2016

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The HTML format for email messages offers many advantages that will help your messages get noticed such as font choices; bold faced, underlined or italicized text; text colors; graphics; pictures and more. If your organization uses these emails to send newsletters or announcements, this can help eliminate the need to send an additional email attachment. This help topic gives some examples of what can be done with the HTML email format for your messages.

If you send messages in HTML format, you will notice that there is still a "Text version" field for the message that appears under the "HTML" message field. This is because it is important to include a plain text version of your message even when the HTML format is sent. This allows recipients whose email programs might not support HTML formatting, or have the HTML formatting turned off, to still be able to receive and read the message. Also, recipients who receive the message on some smart phones may not be able to view it if a plain text version is not sent.

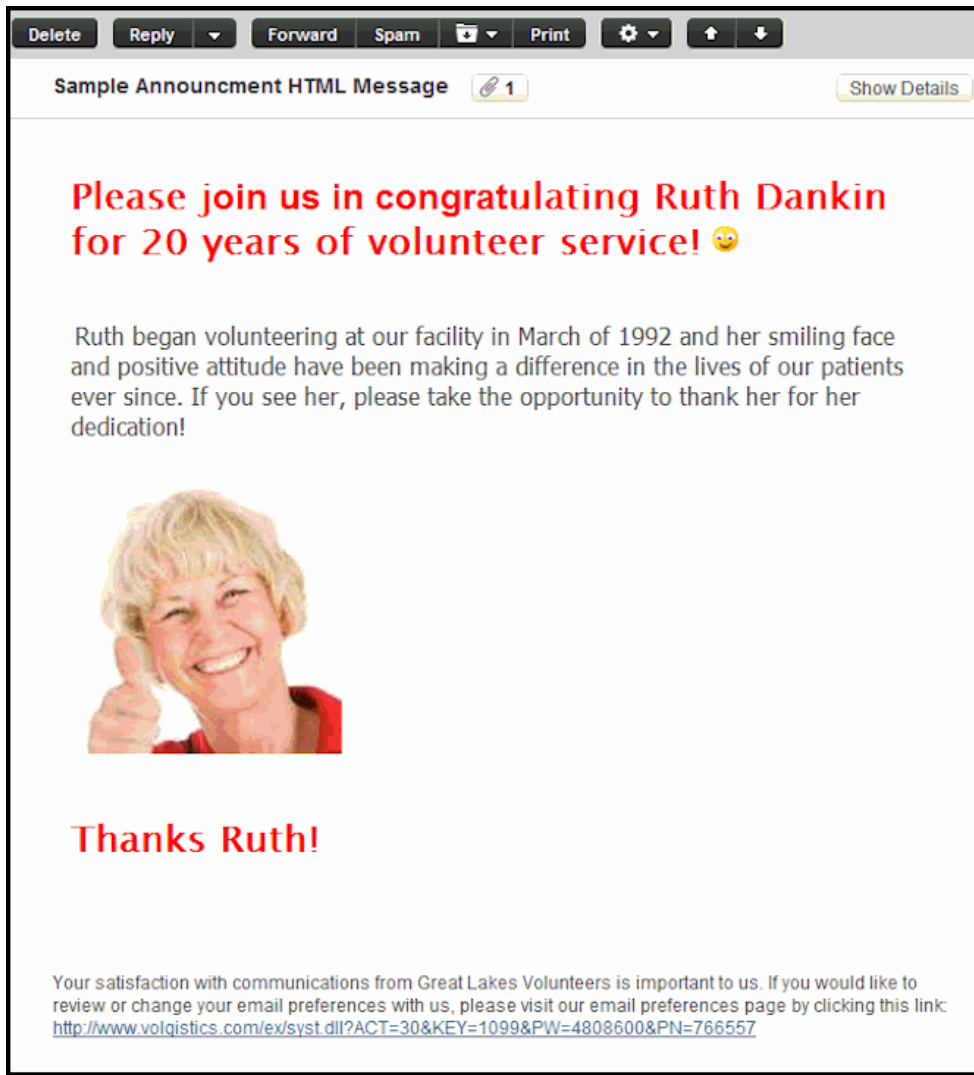
The "Text version" field is automatically populated with the message's content when the **Insert text** button is clicked. Or, if you forget to do this, it will automatically be populated when you send the message. We recommend clicking the button because it may be necessary to edit the plain text version so it appears properly. For example, things such as spacing between paragraphs and the numbers in numbered lists may not transfer correctly to the plain text version.

Here are some examples of how HTML email formatting can be used. [Help topic 1024 \[pg:0278\]](#) shows how to use the HTML editor to produce messages like the ones shown here.

### Make an Announcement

Help your announcements get noticed and read by including larger fonts, colors and icons along with pictures.



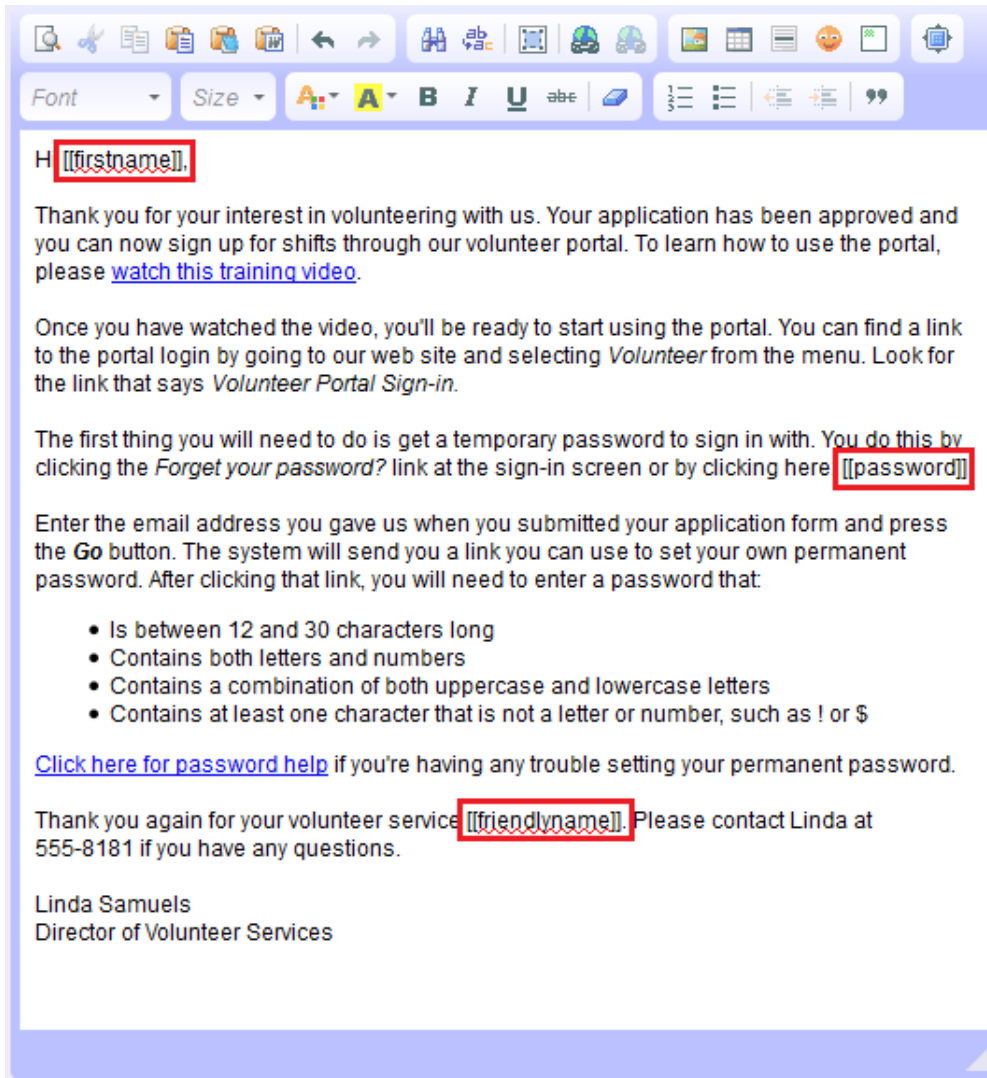


### Send Sign-in Directions

Use the email codes shown in [help topic 2103 \[pg:0386\]](#) to personalize messages to include a volunteer's login information. The bulleted lists provide a great way to include points of emphasis and the hyperlinks can be used to direct volunteers to other web pages.

In the example message shown below, the training video URL addresses can be found at [www.volgistics.com/volunteer-training-videos](http://www.volgistics.com/volunteer-training-videos). We recommend using the video that most closely matches how you have VicNet setup. The help topic we refer to is help topic 1307 "Forget your password? (Volunteers and Coordinators)." The direct URL address for this help topic is <https://www.volgistics.com/ex/Help.dll?ACT=21&TOPIC=1307>.

If you created a message that uses the email codes shown in the red boxes in the example below:



A volunteer with the first name of Jessica and the nickname of Jessie would receive the following message with a link to use to get her VicNet password:



Linda Samuels &lt;LindaS@YourAgency.org&gt;

4:12 PM (9 minutes ago) ☆



to me ▾

Hi Jessica,

Thank you for your interest in volunteering with us. Your application has been approved and you can now sign up for shifts through our volunteer portal. To learn how to use the portal, please [watch this training video](#).

Once you have watched the video, you'll be ready to start using the portal. You can find a link to the portal login by going to our web site and selecting *Volunteer* from the menu. Look for the link that says *Volunteer Portal Sign-in*.

The first thing you will need to do is get a temporary password to sign in with. You do this by clicking the *Forget your password?* link at the sign-in screen or by clicking here: <https://www.volqistics.com/ex/portal.dll?FROM=1067&ACT=211>

Enter the email address you gave us when you submitted your application form and press the *Go* button. The system will send you a link you can use to set your own permanent password. After clicking that link, you will need to enter a password that:

- Is between 12 and 30 characters long
- Contains both letters and numbers
- Contains a combination of both uppercase and lowercase letters
- Contains at least one character that is not a letter or number, such as ! or \$

[Click here for password help](#) if you're having any trouble setting your permanent password.

Thank you again for your volunteer service Jessie. Please contact Linda at 555-8181 if you have any questions.


Linda Samuels  
Director of Volunteer Services

## Send Invitations

Use your logo and customized text colors to personalize invitations for your organization. Text indentations and italics help to off-set and emphasize key information and tables allow you to include concise summaries.

Delete Reply Forward Spam Print Show Details

Sample Invitation HTML Message 1



**Save the date!**

Be sure to save the evening of October 19 to attend our annual Volunteer Recognition Banquet. We want to honor the time, effort and dedication of our volunteer staff with dinner, music and an awards ceremony. Please see the information below for more details:

*Who:* Our Volunteers  
*What:* Volunteer Recognition Banquet  
*When:* Saturday, October 19, 2012 at 7:00 pm  
*Where:* Meadowbrook Community Hall, 1348 Riverside Drive  
[Click here for a map.](#)

**Here's the evening's itinerary:**

Time	Event	Location
6:00 pm	Meet & Greet	Lobby
6:30 pm	Dinner	Dining Room
7:45 pm	Awards Ceremony	Dining Room
9:00 pm	Dance & Reception	Patio

**We look forward to seeing you!**

Please RSVP by October 1st to Carol in Volunteer Services - [CarolH@volunteerservices.com](mailto:CarolH@volunteerservices.com)

Your satisfaction with communications from Great Lakes Volunteers is important to us. If you would like to review or change your email preferences with us, please visit our email preferences page by clicking this link: <http://www.volgistics.com/ex/syst.dll?ACT=30&KEY=1099&PW=4808600&PN=766557>

**Related help**

[Help Topic 2195 \[pg:0404\]](#) - How to send an email message

[Help Topic 1028 \[pg:0299\]](#) - Why HTML Email Messages May Not Appear the Same to Every Recipient

## Why HTML Email Messages May Not Appear the Same to Every Recipient

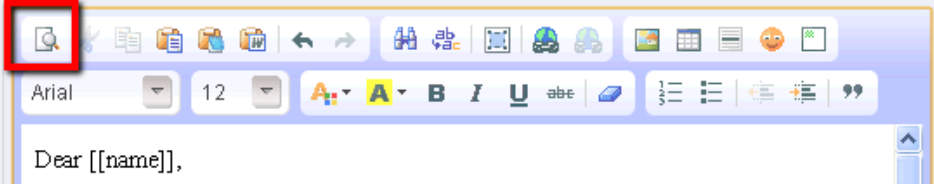
Help topic 1028

Added or revised 09-26-2013

Before you send an HTML Email message, you should preview it first by clicking **Preview** button in the HTML Editor.

To use your browser's [spellchecker](#) in the HTML box, hold the Ctrl key and right-click a misspelled word for correction suggestions

HTML:



Arial 12

Dear [[name]],

This causes the document to open in a new browser window so you can see how the message will look without the HTML Editor toolbar and window. You can then return to the Editor and make any changes to the message you'd like.

The majority of the time, recipients of your message will receive the email exactly as you intended it to appear, or very close. However, there may be cases where the message does not appear correctly when the recipient opens it. This is because there is not a standard protocol in place that every email provider follows to interpret HTML email messages. This means that different email providers may display the same message differently.

One common example is when you use a font that is not supported by the recipient's email provider. Since the font you intended for the message is not available, the recipient's provider substitutes a different font for the message. This can cause your messages to not have the same tone or meaning that you intended.

For example, this message sent with the Comic Sans MS font appears like this in Microsoft Outlook:

Sent: Fri 3/30/2012 5:17 PM  
To: Jessica Tomlinson

---

Dear Jessica Tomlinson,

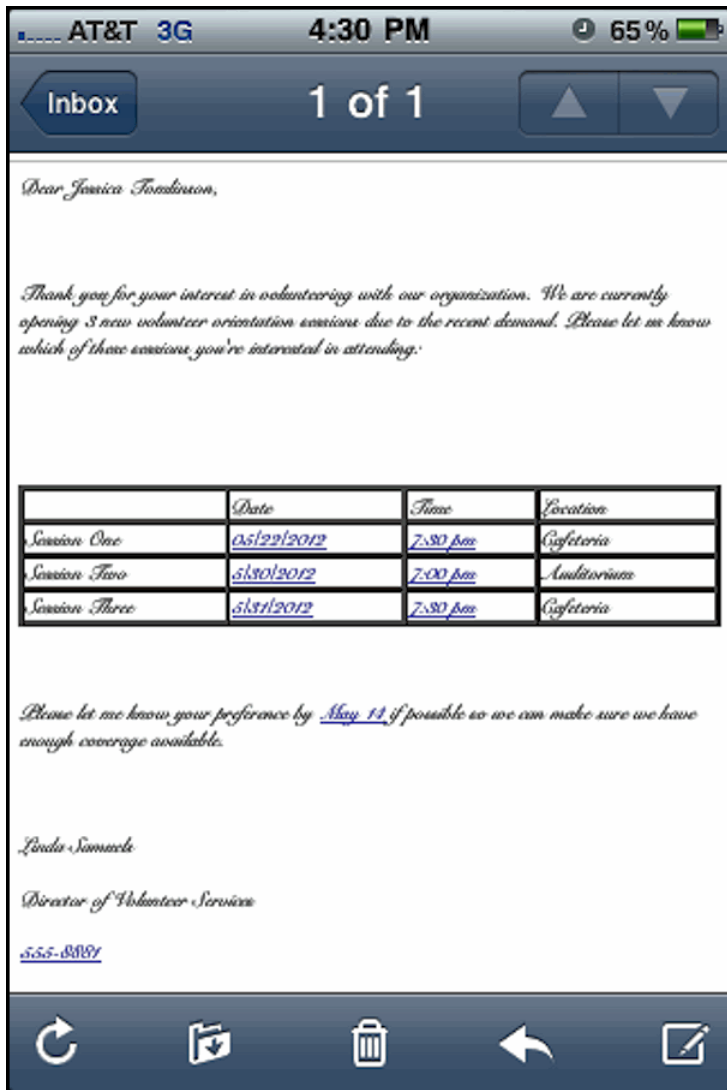
Thank you for your interest in volunteering with our organization. We are currently opening 3 new volunteer orientation sessions due to the recent demand. Please let us know which of these sessions you're interested in attending:

	Date	Time	Location
Session One	05/22/2012	7:30 pm	Cafeteria
Session Two	5/30/2012	7:00 pm	Auditorium
Session Three	5/31/2012	7:30 pm	Cafeteria

Please let me know your preference by May 14 if possible so we can make sure we have enough coverage available.

Linda Samuels  
Director of Volunteer Services  
555-8881

But when received by a recipient through the email on a smart phone, it appears like this:



Volgistics designed its HTML email functions with these differences in mind and tried to include only features and styles that are commonly supported. However, due to the large number of email providers available it is not possible to assure that every message you send will be rendered properly when it is received.

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## How long does it take for email to be delivered?

Help topic 1094

Added or revised 04-28-2014

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The amount of time needed for email messages you send through Volgistics to be delivered to a volunteer or coordinator may vary. Most email messages are delivered within a few minutes, however some may take longer to reach a recipient for the reasons explained in this topic.

Email you send through Volgistics travels like this:

**Your message enters the Volgistics mail queue**



**Volgistics delivers the message to the recipient's mail system**



**The recipient's mail system adds the message to the recipient's mailbox**

When you click the **Send now** button to [send an email message \[pg:0404\]](#), your message is added to the Volgistics mail queue in a matter of seconds.

How long it takes for Volgistics to deliver the message to the recipient's mail system depends on these variables:

- *The number of volunteers and coordinators you send a given message to.* While Volgistics can process many messages at the same time, each message requires a certain amount of time to deliver. So when you send an email message to hundreds or thousands of recipients it will take longer to deliver all of the messages than messages sent to individuals or smaller numbers of recipients. The Volgistics mail queue uses a progressive polling technique rather than simple first-in first-out processing. This means that Volgistics will begin delivering email messages you send right away, even when the queue already contains other messages.
- *If the message includes an attachment.* Messages sent without attachments can usually be delivered to recipient mail systems in a matter of minutes. Messages sent with attachments may take longer, depending on the size of the attachment and the speed at which recipient mail systems can upload it. Mass mailings to hundreds or thousands of recipients that include multi-megabyte attachments could take an hour or more for delivery to recipient mail systems.
- *The availability of the recipient's mail system.* Most mail systems are always available to accept new messages; however some recipient mail systems will decline to accept new messages when they are under heavy load; if they are having operational problems; or as a means of reducing SPAM (greylisting). In these cases Volgistics will try to deliver the message again periodically for up to 24 hours. Since these kinds of delays are caused by the recipient's mail system, they are beyond the control of Volgistics.
- *Greylisting.* Some volunteers and coordinators may have email addresses on mail system that perform greylisting as a means of reducing SPAM. These mail systems intentionally delay the delivery of mail. These greylisting delays are imposed by the recipient's mail system, not by Volgistics.

Once Volgistics delivers a message to a recipient's mail system, their mail system takes over. While most mail systems will add the message to the recipient's mailbox quickly, there are occasionally delays on the recipient's side. These delays are beyond the control of Volgistics as the message is in the recipient's mail system at that point. Recipient mail systems may delay delivery for a variety of reasons. On occasion, a volunteer's email provider may delay delivery to check a message for SPAM.

When you send an email message to multiple recipients it is unlikely that all recipients will receive the message at the same time because of these variables. Since volunteers and coordinators typically have email addresses on many different mail systems, a given email message could be received by one recipient in a matter of minutes, while another may not see the message in their mailbox for hours (if the recipient's mail system is not immediately available or if it delays delivery for any reason).

## **Vic Mail and Text Messages**

In addition to email you can also send messages in two different ways in Volgistics. You can send [Vic mail \[pg:0404\]](#) through Volgistics if you use the [VicNet \[pg:1724\]](#) or [VicTouch \[pg:1778\]](#) modules. Mail sent as Vic mail (in addition to, or instead of by email) is available for volunteers to receive in VicNet or VicTouch immediately. You can also send [text messages \[pg:0343\]](#) through Volgistics if you use the [VicNet \[pg:1724\]](#) module as long as the volunteers and/or [Coordinators \[pg:0163\]](#) receiving the messages have [opted in \[pg:1948\]](#).

## Mailbox In Box Tab

Help topic 1110

Added or revised 07-21-2016

The Mailbox's In Box tab is the tab initially displayed after you select Mailbox from the [menu \[pg:0215\]](#). The In Box tab is used for managing incoming messages such as reports, alerts, and document zip files. Messages are identified by kind, format, date received, subject, and the [System Operator \[pg:0065\]](#) to whom they were directed.

### Mailbox

The screenshot shows the 'In Box' tab selected in a navigation bar. Below the navigation bar is a 'Refresh' button. The main content area is titled 'In Box' and includes a checkbox for 'All sites'. The message list has the following columns: Kind, Date, Subject, and To. The messages listed are:

Kind	Date	Subject	To
Alert	10-03-2013 12:22 p	<a href="#">Declined email</a>	Jim Howard
Report	10-03-2013 12:18 p	<a href="#">Name, address and phone list (stock)</a>	Operator Volgistics
Alert	10-03-2013 12:11 p	<a href="#">Schedule change (removed)</a>	Northside User
Alert	10-03-2013 12:09 p	<a href="#">Schedule change (added)</a>	Operator Volgistics
Report	10-01-2013 4:21 a	<a href="#">Service Summary</a>	Volgistics Team
Alert	09-25-2013 12:20 p	<a href="#">New application</a>	Volgistics Team
Report	09-24-2013 9:57 a	<a href="#">Volunteer address labels (stock)</a>	Volgistics Team

Below the table are buttons for 'Check all', 'Un-check all', and 'Delete'. A message below the buttons reads: 'Click Delete to delete the **checked** messages: [Delete]'

This help topic reviews some of the basic features of the In Box tab. You can click on a link in the *Contents* box below to go directly to a section of the help topic.

#### Contents

- Capacity
- Alerts
- Downloads
- Reports
- Upload Alerts
- Saving Reports Locally



Refreshing the In Box Tab  
Sorting the In Box Tab  
Deleting In Box Items  
Site Level Access and the In Box Tab

## Capacity

The In Box tab is not intended for long term storage. These rules apply to how long items remain on the In Box tab:

- Alerts
  - are deleted from the In Box tab 180 days after they are received.
- Downloads
  - of documents are deleted from the In Box tab 5 days after they are received.
- Reports
  - are deleted from the In Box tab 25 months after they are generated.
  - Upload Alerts are deleted from the In Box tab 5 days after they are received.

[System Operators \[pg:0065\]](#) are limited to 12 reports each. Once the 12 report limit is reached, when the operator generates a new report the oldest report run by the operator is automatically deleted.

If you need to save an item such as a report or download, you will need to save it to your local computer, network, or storage device before it is deleted. To save reports on your local system, see the Saving Reports Locally section of this help topic. To save a download of documents, see the Downloads section of this help topic.

## Alerts

Alerts received on the In Box tab are identified with the following icon:



Depending on your account setup, you could receive five different types of alert messages. These are generated for the following events:

- Subject: New application. Alerts generated when an applicant submits an online application form. [Help topic 1053 \[pg:1334\]](#) shows how to add these alerts.
- Subject: Schedule change (added).
  - Alerts generated when a volunteer adds him or herself to the schedule through [Vic self-scheduling \[pg:1494\]](#)

. For information on adding these alerts, see [Help topic 2172 \[pg:2006\]](#).

- [Subject: Schedule change \(removed\)](#).
- Alerts generated when a volunteer removes him or herself from the schedule through [Vic self-scheduling \[pg:1494\]](#). For information on adding these alerts, see [Help topic 2172 \[pg:2006\]](#)
- [Subject: Declined messages](#). Alerts generated when a [Coordinator \[pg:0163\]](#) or volunteer opts-out of all email communication and text messages from your organization through the [link at the bottom of an email message \[pg:0381\]](#). For information on adding these alerts for volunteers, see [help topic 1068 \[pg:1327\]](#). For information on adding these alerts for Coordinators, see [help topic 1025 \[pg:1325\]](#).
- [Subject: Opt-out of text messaging](#). Alerts generated when a [Coordinator \[pg:0163\]](#) or volunteer opts-out of text messaging by texting STOP or changing their selection in [VicNet \[pg:1724\]](#).

## Downloads

Zip files of downloaded [VicDocs \[pg:1648\]](#) documents may be received on the In Box when a [System Operator \[pg:0065\]](#) performs an action such as [deleting a volunteer record \[pg:2016\]](#) or [deleting a Site, Place or Assignment record \[pg:0112\]](#). The zip files allow you to save the documents associated with records that are deleted from your Volgistics account.

Downloads are identified with the following icon:



The first part of the Subject of the download message shows the type of record that was deleted, and the second part of the subject has the name of the record that was deleted. The chart below shows the abbreviations used for the types of records:

Abbreviation	Record Type
Asgmnt	Assignment
Coord	Coordinator
Place	Place
Site	Site
Vol	Volunteer

*The zip files for downloads are only kept in Volgistics for 5 days so if you wish to keep the download of documents you will need to save the file locally before it is deleted.* In most cases, you can do this by simply clicking on the Subject of the notification. Another option to download the file is to right-click on the Subject of the notification and then select "Save link as . . .", "Save target as . . ." or "Save as . . ." from the menu.

## Reports

Reports received on the In Box tab can be in Microsoft Excel format, or [PDF \[pg:0449\]](#) format. Excel files appear with the following icon:

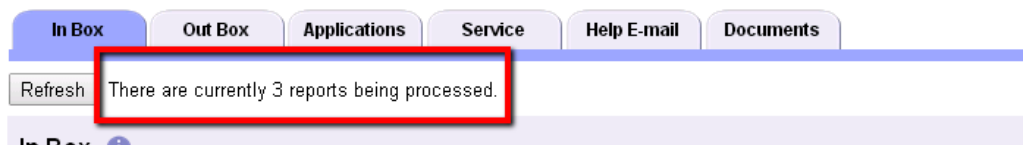


PDF files are identified with the icon shown below:



You can find information on how to print reports, plus a listing of pre-made reports, in [help topic 2104 \[pg:0595\]](#) "Stock Reports." You can also customize your reports in Volgistics. You can find information on this in [help topic 2223 \[pg:0467\]](#) "Creating Custom Reports."

If you have requested a report and the system is still working to compile the information, you will see a message by the **Refresh** button indicating there is a report pending. This message will indicate how many reports are currently pending for your entire account.



These could be reports initiated by a [Site Level Operator \[pg:1442\]](#) other than yourself so you may not actually see the reports on the In Box tab when they are completed. The Site Level Access and the In Box Tab section below explains more about this. If you remain on the In Box tab, you will need to Refresh the tab to see pending reports that have completed since you visited the tab.

### Upload Alerts

When you upload [VicDocs \[pg:1648\]](#) files, the system scans the document to check for viruses. If the scan shows a file may have a virus, the document is deleted to protect the system. When this occurs, you will receive an Upload Alert on the In Box tab. Upload Alerts are identified with the icon shown below:

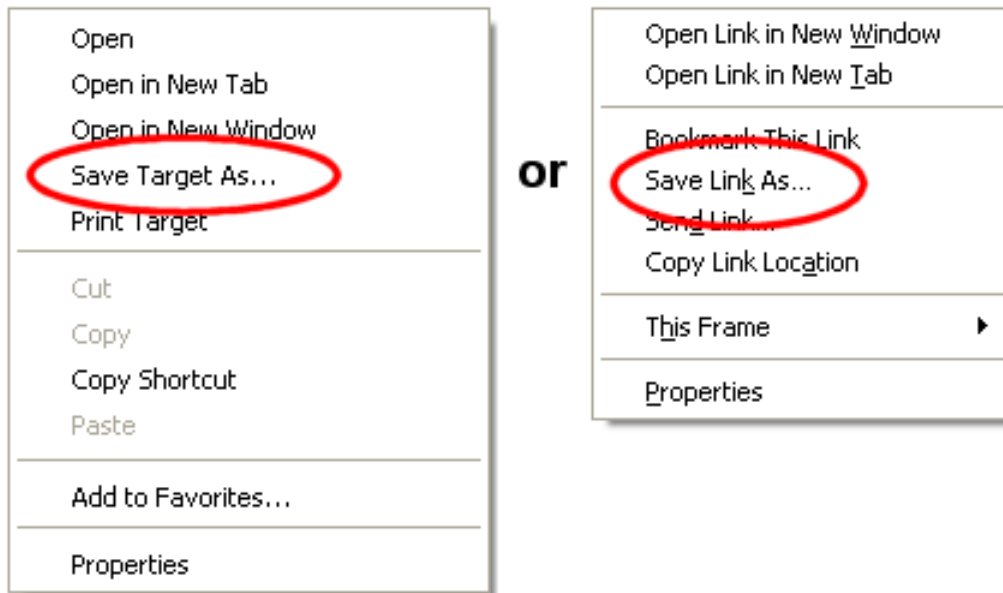


The Subject of the alert shows the name of the file that was infected. Click on the Subject to learn more about the Docs tab where the upload attempt was made. The following help topics have more information about the Docs tabs where documents can be uploaded:

- [Help Topic 2548 \[pg:1630\]](#) - Docs Tab (Volunteer Records)
- [Help Topic 2549 \[pg:1636\]](#) - Docs Tab (Coordinator Records)
- [Help Topic 2550 \[pg:1642\]](#) - Docs Tab (Site, Place & Assignment Records)

## Saving Reports Locally

As noted in the Capacity section of this help topic, the In Box tab is not intended for the long term storage. To save a report to your local computer (or flash drive or other storage medium), right-click on the Subject of the report on the In Box tab and then select "Save target as...", "Save link as..." or "Save as..." from the prompt.



Then follow the steps to save the file to a local storage location. You can also save reports by opening them in Excel or Adobe Reader and then using the program to save the report. [Help topic 2106 \[pg:0446\]](#) explains more about how to do this.

There is not a way to save Alerts locally without copying and pasting them into a spreadsheet or word processing document.

## Refreshing the In Box Tab

The In Box tab will show an up-to-date view each time you select Mailbox on the Volgistics menu [pg:0215]. If you're on the In Box tab and you want to update the view without leaving the tab, click the **Refresh** button in the top left corner of the In Box tab.

## Sorting the In Box Tab

By default, the In Box tab is sorted by the Date column with the most recent items at the top.

As your In Box tab receives more items such as alerts, reports, and downloads, it may become difficult to find an item you're looking for. To help you with this, Volgistics allows you to sort the In Box by the Kind, Date, Subject and To columns. Just click on the column heading to sort the In Box by that column's information.

The screenshot shows the 'In Box' tab interface. At the top left, there is a header 'In Box' with an information icon. Below it are four column headers: 'Kind', 'Date', 'Subject', and 'To'. Red arrows point to each of these headers. At the top right, there is a checkbox labeled 'All sites' with an information icon. Below the headers is a table of items:

Kind	Date	Subject	To
Alert	10-03-2013 12:22 p	Declined email	Jim Howard
Report	10-03-2013 12:18 p	Name, address and phone list (stock)	Operator Volgistics
Alert	10-03-2013 12:11 p	Schedule change (removed)	Northside Lear

## Deleting In Box Items

To delete an item from the In Box tab, check the box next to the item you'd like to delete and then click the **Delete** button. You can clear out your entire In Box at once by clicking the **Check all** button and then the **Delete** button.

### Please note. . .

1.

The

#### Delete

buttons are located at the bottom of the tab so if your account has many items, you will need to scroll to the bottom of the tab to locate the buttons.

2. The In Box tab is shared by the [System Operators \[pg:0065\]](#) in your account so if you don't recognize an item, you may want to check with the operator listed in the *To* column before you delete the entry.

## Site Level Access and the In Box Tab

If an organization uses [Site Level Access \[pg:0092\]](#) and a [System Operator \[pg:0065\]](#) is logged in as a Headquarters-level operator, the In Box tab will have a checkbox for

### *All Sites*

in the upper right corner. If this box is checked, the operator will view reports generated by Headquarters as well as reports generated by [Site-level Operators \[pg:1442\]](#). If the *All Sites* box is un-checked, only reports generated by Headquarters will be displayed on a Headquarters-level operator's In Box tab.

Users logged in as Site-level Operators will not see the *All Sites* checkbox on the In Box tab. With Site Level Access, the In Box tab will only display reports generated at their Site.

---

## Adding a Sender ID policy for Volgistics

Help topic 1113

Added or revised 04-13-2016

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Volgistics.com is a web based volunteer management system used by organizations around the world to track, communicate with, and manage volunteers.

Organizations can use Volgistics to send email to their volunteers.

When organizations send email through Volgistics they can use any of their own email addresses as the "From" address for their email, even though the email is actually sent by Volgistics email servers. For example, a volunteer administrator named Abby Abbott at an organization with the domain "Example.org" can send email through Volgistics using her organization's email address of Abby@Example.org in the email "From" field even though her email is being relayed by Volgistics.com.

In order to help ensure email delivery, Volgistics uses the Sender ID method of email authentication. With Sender ID, the mail your organization sends to volunteers through Volgistics can be verified more accurately by recipient mail systems, often bypassing spam filters and giving your email a better chance of reaching all volunteer recipients.

Recipient email systems can perform Sender ID email authentication by checking a special *DNS record* for the sender's domain that lists the mail servers that are allowed to send mail on behalf of that domain. If the server that sent the message is listed as one that is allowed to send mail for the domain, the mail is accepted for delivery and often is marked as "authenticated" for the recipient. If the server that sent the message is not listed as one that is allowed to send mail for the domain - or if the domain does not have a DNS record with its mail policy – an email message may be classified as possible spam or rejected by email systems that use Sender ID.

The DNS records that make Sender ID possible are known as *SPF records*. To enable Sender ID email authentication for the email your organization sends through Volgistics, you add the volgistics.com domain to your existing SPF record if you have one; or you add an SPF record that includes Volgistics.com if you do not yet have an SPF record for your domain.

There may be cases where you want to use the IP addresses for the Volgistics servers that send email also. These IP addresses are:

69.87.157.214  
69.87.157.215  
69.87.157.216  
69.87.157.217

Adding Volgistics.com, or the IP addresses, to an SPF record is a task that should be performed by someone with the technical skills and authority to manage DNS for your organization's domain. This would typically be an organization's IT administrator, or an organization's Internet Service Provider (ISP).

The creation and installation of SPF records is beyond the scope of this help topic, however there are a number of online support resources available. If you need additional support adding TXT records to your DNS server you should contact your ISP or DNS administrator for additional assistance. DNS server management is beyond the scope of the customer support services available from Volgistics.

### **If your organization already has an SPF record**

If your organization already has an SPF record all you need to do is update your existing record to include Volgistics.com as an authorized domain. You can do this by adding the following text to the record:

```
include:volgistics.com
```

For example, if you have an existing SPF record that looks like this:

```
v=spf1 mx ?all
```

...you would modify the existing record so it looks like this:

```
v=spf1 mx include:volgistics.com ?all
```

### **If your organization does not have an SPF record**

If your organization has its own domain (for instance "Example.org"), but you do not have a DNS (TXT) record with SPF instructions for your domain, you can add one that includes Volgistics. When you create your SPF record, include volgistics.com as an authorized or "outsourced" domain allowed to send email on your behalf. You can do this by adding the following text to your record:

```
include:volgistics.com
```

If you create a new SPF record for your domain, be careful to include all of the email servers that may relay email for your domain. A mistake in your SPF record could cause email for your domain to fail Sender ID checks. There are also a number of SPF checker tools available online, which can help you avoid these mistakes.

### Using free public email systems

If your organization is using a free public email provider, like Gmail, Yahoo, Hotmail, or AOL, you may encounter a different problem. Another email authentication protocol, DMARC, has been implemented by many of these services and prevents systems like Volgistics from sending email on their behalf. So if you use 123Foundation@gmail.com as your email address, messages Volgistics sends for you won't reach volunteers that use any email provider who has implemented DMARC.

The best way to avoid problems sending email through Volgistics is to use your own domain and add an SPF record with volgistics.com as an allowed sender. If you already have your own domain, your registrar might have email features you can use, so you can move away from your free public service. Otherwise, Google Apps for Work is an inexpensive alternative.

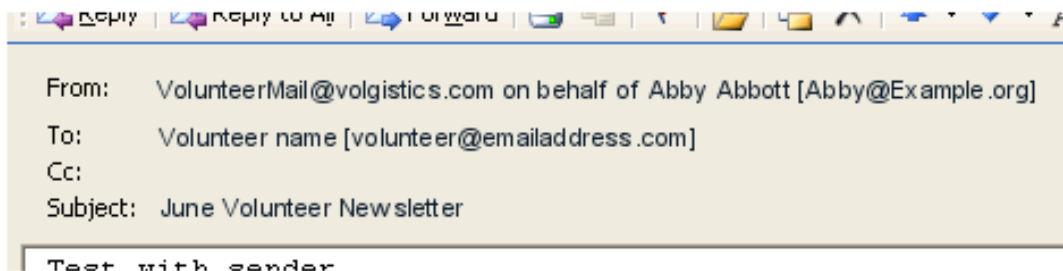
If you don't have your own domain yet, you can get one quickly and easily from a registrar like GoDaddy or Google Domains. Most domain registrations are relatively inexpensive, and may include a couple email addresses you can use. Otherwise the registrar will likely offer email as a small upcharge. In either case, you'll also be able to manage your own DNS records so you can allow volgistics.com to send mail on your behalf.

As mentioned above, if you're not sure how to edit or create the SPF record for your domain, your organization's IT department, or your registrar, should be able to make the change or walk you through it.

### Having trouble?

If your organization cannot add a Sender ID policy for Volgistics to your own domain's SPF record for any reason, you can configure your organization's Volgistics account so that the Volgistics system handles Sender ID for you.

When you do this, you still relay mail using your own email address in the "From" field of the mail you relay and your mail will pass Sender ID authentication, however Volgistics must add a "Sender" field to identify Volgistics.com as the sender of each message. With this additional "Sender" field, some email recipients (those who use Outlook, for example) may see the Sender email address of VolunteerMail@Volgistics.com along with your own email address in the "From" field, as shown here:



Adding Volgistics to your own domain's SPF or Sender ID record as explained in this help topic eliminates the Sender field, causing the "From" field to display only your own email address when volunteer recipients read their mail, as shown here:



Keep in mind that if the domain you use for email has implemented DMARC, this option will still not allow volunteers to receive messages you send. If you would like Volgistics to handle Sender ID authentication, your organization's Volgistics Administrator should do this:

1. Choose Setup from the menu in Volgistics.
2. Select Messages.
3. Select Ground Rules.
4. Locate the Email Authentication section.
5. Choose "Let Volgistics handle Sender ID."
6. Click the **Save** button.

---

## Sender ID

Help topic 1116

Added or revised 05-10-2016

---

Sender ID is a method of sending email so that receiving email systems can verify that the sender of a message is who they say they are. This is known as *email authentication*, and Sender ID is one of several email authentication methods.

With Sender ID, the mail you send to volunteers and coordinators through Volgistics can be verified more accurately by receiving mail systems, often bypassing spam filters and giving your email a better chance of arriving in each recipient's inbox. In addition, many ISP's like Hotmail will flag your email as

*authenticated*

when you use Sender ID, which improves the probability of your email being opened by volunteers and [Coordinators \[pg:0163\]](#).

Volgistics can add Sender ID authentication to your email automatically, and we encourage all organizations to use Sender ID authentication with their email to help improve email deliverability.



There are two ways you can add Sender ID authentication to the email you send through Volgistics:

- Let Volgistics handle Sender ID
- Your organization can handle Sender ID itself

This help topic explains how each method works, and how to select the method you want Volgistics to use for the email you send through your Volgistics account.

With Sender ID there is no change to the way you send email messages, and you [send email from Volgistics \[pg:0404\]](#) the same way with either option.

### Let Volgistics handle Sender ID

The easiest way to have your email authenticated with Sender ID is to let Volgistics handle it. With this option your organization does not need to do anything else for Sender ID authentication to work with the email you send through Volgistics.

When you let Volgistics handle Sender ID, a *Sender* email address is automatically added to each email message you send. This *Sender* address gives recipient email systems a way to verify that your email came from Volgistics.

You can still use your own email address as the *From* and *Reply-to* [\[pg:0398\]](#) email address for your email, however some email programs such as Microsoft Outlook may show the Sender email address along with your email address in the *From* field when volunteers and Coordinators read your email messages.

Here's an example of how a message with Sender ID might appear in Microsoft Outlook for a message sent through Volgistics by someone named Abby Abbott with the email address of abby@example.org



Not all email programs display the Sender email address, so in many email programs the Sender address will never be visible to the recipient. Even if the Sender email address is visible to a volunteer or Coordinator recipient, your own email address will always appear too, and replies to your messages will still always go to the email address you specify as the Reply-to address.

Some organizations may prefer not to have this Sender ID field included in the messages they send through Volgistics, so Volgistics also provides a way for organizations to handle Sender ID authentication themselves. If your organization handles its own Sender ID authentication, email you send through Volgistics will not include the Sender field, but it will still be authenticated with a Sender ID. The next section explains more about handling Sender ID authentication yourself.

If you'd like Volgistics to send your email with Sender ID authentication, just follow these steps (you'll need access to the Volgistics [Setup page \[pg:0887\]](#) to do this, so if you are not your organization's [Volgistics Administrator \[pg:0052\]](#), check with them for assistance with this):

1. Choose [Setup \[pg:0887\]](#) from the menu.
2. Select Messages.
3. Select *Ground Rules*.
4. Locate the Email Authentication section.
5. Select *Let Volgistics handle Sender ID*.
6. Click the **Save** button.

**Email authentication**

Email authentication helps ensure that email you send through Volgistics is delivered, and helps prevent your email from going into spam folders.

Let Volgistics handle Sender ID (recommended)

My organization will handle Sender ID itself

[What's the difference?](#)

**Opt-out message**

"You received this mail through your affiliation with {organization name}. You may change your email preferences with {organization name} at {link}."

"Click on the link below to change your email preferences for communications from {organization name}. Please note that we only send email when necessary, so opting out of our mailings could cause you to miss important information. {link}"

"Your satisfaction with communications from {organization name} is important to us. If you would like to review or change your email preferences with us, please visit our email preferences page at {link}."

"Want to control which emails you receive from {organization name}? Go to: {link}."

[Help](#)

When you choose *Let Volgistics handle Sender ID*, your Volgistics email will start including Sender ID authentication right away (there's nothing else you need to do).

### **Your organization can handle Sender ID itself**

If you choose to handle Sender ID authentication yourself, the person who manages your organization's Internet domain (the domain name that appears after "@" in your email address) creates a domain policy that says it is okay for Volgistics to relay mail for you. Then when you send email through Volgistics your domain policy will tell the recipient mail systems that it is okay for Volgistics to send mail with your email address in the From field.

This policy is relatively easy for your domain administrator (IT department or ISP) to add, and it only needs to be added once.

Once this policy is in place, the email you send through Volgistics will include Sender ID authentication.

Help Topic 1113 [Adding a Sender ID policy for Volgistics \[pg:0308\]](#) has all of the technical information that the person who manages your Internet domain would need to add this policy. You can send the person who manages your domain a copy of that Help Topic, or you can give them this link to it:

<https://www.volgistics.com/ex/help.dll?ACT=21&TOPIC=1113>

As always, you use your own email address as the *From* and *Reply-to* email address for the mail you send through Volgistics; but with this option there is no need for a Sender email address to be added to your messages, so recipients would not see the VolunteerMail@Volgistics.com email address when they read your email.

To select the email Sender ID policy you want to use for the email you send through Volgistics:

1. Choose [Setup \[pg:0887\]](#) from the menu.
2. Select Messages.
3. Select *Ground Rules*.
4. Locate the Email Authentication section.
5. Select *My organization will handle Sender ID itself*.
6. Click the **Save** button to save your change.

### Email authentication

Email authentication helps ensure that email you send through Volgistics is delivered, and helps prevent your email from going into spam folders.

Let Volgistics handle Sender ID (recommended)

My organization will handle Sender ID itself

[What's the difference?](#)

### Opt-out message

"You received this mail through your affiliation with {organization name}. You may change your email preferences with {organization name} at {link}."

"Click on the link below to change your email preferences for communications from {organization name}. Please note that we only send email when necessary, so opting out of our mailings could cause you to miss important information. {link}"

"Your satisfaction with communications from {organization name} is important to us. If you would like to review or change your email preferences with us, please visit our email preferences page at {link}."

"Want to control which emails you receive from {organization name}? Go to: {link}."

[Help](#)

All email you send through Volgistics - including automatic email messages such as schedule and checklist reminders - is sent using the Sender ID option you choose.

---

## How To Send Vic Mail

Help topic 1127

Added or revised 08-18-2014

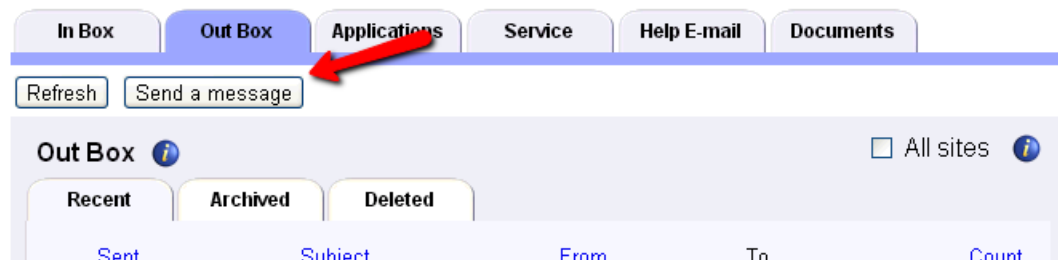
---

The Vic Mail feature allows organizations to send messages to volunteers through the optional [VicNet \[pg:1724\]](#) or [VicTouch \[pg:1778\]](#) modules. If an organization uses VicNet or VicTouch, they can create a message that volunteers can receive when they log into either of these modules. Please note that in VicTouch the message screen only appears after a volunteer selects the **Sign-in** or **Sign-out** button. If they enter their PIN but only view their schedule or service history, they will not see the message.

In order for Vic Mail messages to be delivered, you must have the option to receive them enabled. For VicNet this is done on the Vic Mail tab setup page. To get to this page select "Setup" from the menu, expand the "VicNet" link, and select "Mail tab." For VicTouch this is done on the Mail screen setup page. To get to this page select "Setup" from the menu, expand the "VicTouch" link, select "Check-in sequence" and then "Mail screen setup."

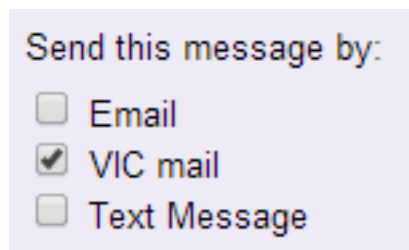
This help topic explains how to compose and send a new Vic Mail message from the Volgistics Mailbox. If you are not already on the "New Message" window, you can get there by selecting "Mailbox" from the [menu \[pg:0215\]](#), clicking the Out Box tab, and then clicking the **Send a message** button.

### Mailbox



Send this message by

Check the *VIC mail* checkbox if you want volunteers to receive this message when they visit VicNet or VicTouch. If you don't use VicNet or VicTouch, the *VIC mail* option will not appear so you will not have the ability to use Vic Mail.

A screenshot of a form titled "Send this message by:". It contains three checkboxes with corresponding labels: "Email", "VIC mail", and "Text Message". The "VIC mail" checkbox is checked, while the "Email" and "Text Message" checkboxes are unchecked.

Alternatively, you can check the *Email* checkbox to [send this message by Email \[pg:0404\]](#).

You may check both checkboxes (VIC mail and Email) if you want volunteers to receive this message both by email, and at VicNet or VicTouch.

If your account has [enabled text messaging \[pg:0321\]](#), there will also be a *Text Message* option. While you can send one message by both text and VIC mail, it may be more beneficial to send separate VIC mail and text messages. This is because your Vic mail message will be limited to 110 characters, or your volunteers will just receive an alert by text that a message has been sent instead of the message itself by text.

### From

Messages are always from you (the name entered for you on your Volgistics system operator record).

### To

Use the *To* section to specify which volunteers and/or [Coordinators \[pg:0163\]](#) this message should be sent to.

To send your message to an individual volunteer, select the volunteer's name from the Volunteers dropdown list.

To send your message to all of the [tagged \[pg:1529\]](#) volunteers, check the *Tagged volunteers* checkbox.

To send your message to all volunteers with a specific [Status \[pg:1832\]](#) (such as all volunteers with the Active Status), select the Status of the volunteers you want to receive the message.

Check "All of the volunteers in this Set" and then choose a [Set \[pg:0396\]](#) to send your message to all of the volunteers in a specific set.

To send your message to every volunteer in your database (except [archived \[pg:0709\]](#) volunteers) no matter what their Status is, check the "All volunteers" checkbox.

To send your message to an individual Coordinator, select the Coordinator's name from the Coordinators dropdown list.

Check the "All coordinators" checkbox to send your message to all Coordinators.

### Subject

Enter a subject for your message. This will appear as the subject of your Vic Mail message when its recipient views it at VicNet or VicTouch.

### Attachment

If you attach a PDF file or Microsoft Word to your Vic Mail message, the recipient will be able to open the document if they view the message in VicNet; however, there is not currently a way for attachments to be displayed in messages received at VicTouch.

If you've previously uploaded the file you want to attach, choose it from the Attachment dropdown list. If you haven't uploaded the file you want to attach, you should close the New Message window and [upload the file \[pg:0388\]](#) first.

### Message

Enter your message in the message text area. If your message is long, consider writing it in a word processor, and then [pasting \[pg:0063\]](#) it in the Message field. Please note that messages you send using Vic Mail are sent as plain text messages (rather than with HTML formatting).

When sending Vic Mail at the same time as you send HTML Email messages, you should verify that the plain text message is formatted correctly by checking how the message appears in the Plain text box which is how the messages should appear to Vic Mail recipients.

If you are sending the message as both a text and a Vic mail message, you will either need to limit the message length to 110 characters or less, or have the volunteers just receive a text alert that a message has been sent to them.

Post until:

Enter the date this message should no longer be posted at VicNet or VicTouch. If a volunteer has not viewed a Vic Mail message by the date entered in this field, the message will no longer be retrievable at VicNet or VicTouch.

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## **A volunteer or coordinator cannot open a Microsoft Word file attachment**

Help topic 1190

Added or revised 09-24-2013

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You can send email through Volgistics with file attachments that are either PDF (Portable Document Format), DOC or DOCX (Microsoft Word document) files.

If you choose to send a Microsoft Word document to volunteers or coordinators as an email attachment, each recipient's ability to open the attachment will depend on their having a software program compatible with this Microsoft Corporation file format. Volunteers or coordinators who receive the attachment, but who use a different version of Microsoft Office than you used to create the attachment, or who do not have a program capable of reading DOC or DOCX files may not be able to open the attachment.

In addition, some recipient email systems and anti-virus programs may strip or re-name email attachments that are Word documents because these files could potentially contain computer viruses. If a recipient receives the DOC or DOCX file attachment, but the attachment's file name has been altered by their email or anti-virus system (Volgistics does not alter the attachment file name), their computer may not know that the file is a Word document and therefore be unable to open it.

Unless you know your volunteer or coordinator email recipients will be able to open Microsoft Word documents, choosing to send email attachments as PDF files rather than DOC or DOCX files will generally result in more recipients being able to open and view the attachment. PDF files may be opened with [Adobe Reader which is freely available \[pg:0449\]](#).

Volgistics does not alter the DOC, DOCX or PDF files you include as email attachments.

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## **How to Modify a Table in an HTML Email Message**

Help topic 1199

Added or revised 09-25-2013

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This help topic gives instructions on how to modify an existing table in an HTML message. For information on actually creating a table, please see the "Table" section in Help topic 1024.

Click on a link in the Content window below to be taken directly to that section of the Help topic.

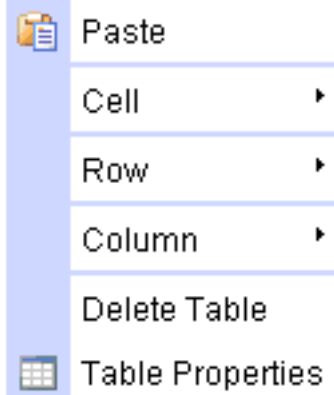
**Content**

Cell

Row

Column  
Delete Table  
Table Properties

To modify your table, right click on it to bring up the option list shown below. To find out more about a specific option, see the corresponding section below.



To find out more about a specific option, see the corresponding section of this Help topic.

Depending on the web browser you're using, you may also see options to resize the table, merge cells, and add rows and columns, after you click on the table with your mouse. These are functions of the web browser you're using so if you do not see them you'll need to use the menu options shown in this Help topic to modify your table.

## Cell

Expanding the Cell option brings up the list shown below that allows you to choose the following options for how the cells in the table appear. To find out more about a specific option, see the corresponding section below.



Insert Cell Before: This option inserts a new cell before the cell that contains the cursor.

Insert Cell After: This option inserts a new cell after the cell that contains the cursor.

Delete Cells: This option deletes the cell that contains the cursor.

Merge Cells: This option only appears enabled if more than one cell is selected. It merges the selected cells into one cell.

Merge Right: This option only appears enabled if just one cell is selected. It merges the cell that contains the cursor with the cell to its right.

Merge Down: This option only appears enabled if just one cell is selected. It merges the cell that contains the cursor with the cell below it.

Split Cell Horizontally: This option only appears enabled if just one cell is selected. It splits the selected cell into a left and right cell.

Split Cell Vertically: This option only appears enabled if just one cell is selected. It splits the selected cell into upper and lower cells.

Cell Properties: This option opens the dialog window shown below:

The screenshot shows a dialog box titled "Cell Properties" with a close button in the top right corner. The dialog is divided into two columns of settings. The left column includes: "Width" with an input field and a "pixels" dropdown; "Height" with an input field and a "pixels" dropdown; "Word Wrap" with a dropdown set to "Yes"; "Horizontal Alignment" with a dropdown set to "<not set>"; and "Vertical Alignment" with a dropdown set to "<not set>". The right column includes: "Cell Type" with a dropdown set to "Data"; "Rows Span" with an input field; "Columns Span" with an input field; "Background Color" with an input field and a blue "Choose" button; and "Border Color" with an input field and a blue "Choose" button. At the bottom of the dialog are two buttons: a green "OK" button and a red "Cancel" button.

See the paragraphs below for information on the fields on this window.

*Width*: Enter a number in pixels for the width of the cell. You can also enter a percentage value for how much of the row the cell will occupy. Use the dropdown to change between pixels and percent.

*Height*: Enter a number in pixels for the height of the cell.

*Word Wrap*: Use the dropdown to select whether you want the cell's content to automatically wrap to the next line or not.

*Horizontal Alignment*: Use the dropdown to select whether you want the cell's content to be aligned to the left or right, or appear centered, in the cell. If the dropdown is not changed from the "not set" option, the content will be aligned to the left.



**Vertical Alignment:** Use the dropdown to select how you want the vertical alignment for your cell's content to appear. You can choose between Top, Middle, Bottom or Baseline. If the dropdown is not changed from the "not set" option, the alignment will be Middle by default.

**Cell Type:** Use the dropdown to select whether or not the cell has the regular data format or the header format. Choosing the header type will cause the cell's content to appear with the center alignment and in bold.

**Rows Span:** Use this option to stretch the cell where the cursor appears downward over several rows. The number value selected controls how many rows will be incorporated. This works differently than the Merge Down option shown above because it extends the table's rows beyond their current dimensions.

If you do not like the result after using this option, click the **Undo** button to restore your table to how it appeared before. Please see the "Undo" section in Help topic 1024 if you need help finding this button.

**Columns Span:** Use this option to stretch the cell where the cursor appears to the right over several columns. The number value selected controls how many columns will be incorporated. This works differently than the Merge Right option shown above because it extends the table's columns beyond their current dimensions.

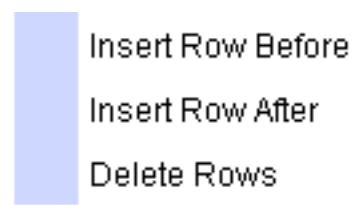
If you do not like the result after using this option, click the **Undo** button to restore your table to how it appeared before. Please see the "Undo" section in Help topic 1024 if you need help finding this button.

**Background Color:** Enter a color value directly in the text field and click the **OK** button to apply your choice to the background of the selected cell. You can also click the **Choose** button beside the field to open a dialog window to select your color. See the "More Colors" section in Help topic 1024 if you need more help using this dialog window.

**Border Color:** Enter a color value directly in the text field and click the **OK** button to apply your choice to the border of the selected cell. You can also click the **Choose** button beside the field to open a dialog window to select your color. See the "More Colors" section in Help topic 1024 if you need more help using this dialog window.

## Row

Expanding the Row option brings up the list shown below that allows you to choose the following options for how the rows in the table appear. To find out more about a specific option, see the corresponding section below.



**Insert Row Before:** This option inserts a new row above the row that contains the cursor.

**Insert Row After:** This option inserts a new row below the row that contains the cursor.

**Delete Rows:** This option deletes the row that contains the cursor.

## Column

Expanding the Column option brings up the list shown below that allows you to choose the following options for how the columns in the table appear. To find out more about a specific option, see the corresponding section below.

Insert Column Before

Insert Column After

Delete Columns

Insert Column Before: This option inserts a new column to the left of the column that contains the cursor.

Insert Column After: This option inserts a new column to the right of the column that contains the cursor.

Delete Columns: This option deletes the column that contains the cursor.

### Delete Table

Select this option to delete the entire table and all of its content from your message. If you delete your table by mistake, click the **Undo** button to restore it. Please see the "Undo" section in Help topic 1024 if you need help finding this button.

### Table Properties

Select this option to return to the dialog window shown when you create a table. For help with this dialog window, see the "Table" section in Help topic 1024.

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## How to Enable Text Messaging for Your Account

Help topic 1290

Added or revised 06-20-2014

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Volgistics offers text messaging (SMS) free of charge as part of its regular features. With text messaging, you can send texts to volunteers and [Coordinators \[pg:0163\]](#), have volunteers and/or Coordinators receive automated text messages, and receive certain text alerts as a [System Operator \[pg:0065\]](#).

While there is not a charge for the text messaging feature, it does require accounts to include the [VicNet \[pg:1724\]](#) module in their account's [service level \[pg:0719\]](#). VicNet is necessary because it provides a way for volunteers and Coordinators to opt-in and out of text messaging, plus manage their text preferences. If VicNet is not currently part of your account's service level, you can add it by following the steps shown in [help topic 2007 \[pg:0050\]](#).

To use text messaging, each volunteer, Coordinator, and System Operator that opts-in will need to agree to Volgistics' text messaging terms and conditions. You can also add additional terms for your organization if you'd like.

To enable text messaging for your account:

1. Select [Setup \[pg:0887\]](#) from the menu.
2. Expand the *Messages* link.
3. Select *Ground Rules*.
4. Scroll down to the *Text Messaging (SMS) Ground Rules* section.

5. Select an option to allow text messaging with the standard terms, or with the standard terms plus additional terms for your organization.

**Text Messaging (SMS) Ground Rules**

**Text Messaging**

Allow System Operators to send custom messages to volunteers and coordinators, and allow everyone to receive automated messages.

- Do not allow text messaging
- Allow text messaging with standard [terms and conditions](#)
- Allow text messaging with standard [terms and conditions](#), plus additional terms and conditions:

6. If you require additional terms, type (or copy and paste) the additional terms.

- Do not allow text messaging
- Allow text messaging with standard [terms and conditions](#)
- Allow text messaging with standard [terms and conditions](#), plus additional terms and conditions:

Terms and conditions (in addition to those legally-required) your organization would like to require:

To make this change in text message (SMS) options for your account, please enter your password. This will be added to the Event Log.

7. Enter the password you use to sign-in to Volgistics into the password field and click the **Save** button.

required) your organization would like to require:

To make this change in text message (SMS) options for your account, please enter your password. This will be added to the Event Log.

[Help](#)

**System Operators** [pg:0065] will now be able to send text messages as long as their **System Operator rights** [ ] allow them to send email and text messages. To receive alerts for **application form** [pg:0413] submissions, they will need to **opt-in to text messaging** [pg:1958].

**Volunteers and Coordinators** [pg:0163] will need to **opt-in to text messaging** [pg:1948] in order to receive **custom messages** [pg:0343], or automatic messages such as **schedule reminders** [pg:0791].

**Related help**

**Help Topic 1023** [pg:1321] - Message Types

[Help Topic 1025 \[pg:1325\]](#) - Coordinator Message Preferences  
[Help Topic 1068 \[pg:1327\]](#) - Volunteer Message Preferences  
[Help Topic 1290 \[pg:0321\]](#) - How to Enable Text Messaging for Your Account  
[Help Topic 1291 \[pg:1948\]](#) - How Volunteers & Coordinators Opt-in & Opt-out of Text Messaging  
[Help Topic 1292 \[pg:0333\]](#) - Text Message Validity  
[Help Topic 1293 \[pg:1958\]](#) - How System Operators Opt-in & Opt-out of Text Messaging  
[Help Topic 1294 \[pg:0342\]](#) - How to Disable Text Messaging for Your Account  
[Help Topic 1295 \[pg:0343\]](#) - How to Send a Text Message  
[Help Topic 1296 \[pg:0837\]](#) - Find Volunteers with Invalid Text Numbers  
[Help Topic 1297 \[pg:0837\]](#) - Their Text Message Set Rule  
[Help Topic 1298 \[pg:0840\]](#) - Their Text Message Validity Set Rule  
[Help Topic 1299 \[pg:0347\]](#) - Using Email and Text Messages Together  
[Help Topic 1300 \[pg:1966\]](#) - Text Messaging  
[Help Topic 1301 \[pg:1971\]](#) - Text Messaging  
[Help Topic 1991 \[pg:1978\]](#) - Mailbox Out Box Tab  
[Help Topic 2100 \[pg:0381\]](#) - Introduction to Message Preferences  
[Help Topic 2185 \[pg:0396\]](#) - How to Send Messages to the Volunteers in a Set  
[Help Topic 2192 \[pg:0401\]](#) - How to Send Messages to the Volunteers Scheduled on a Certain Day  
[Help Topic 2193 \[pg:0402\]](#) - How to Send Messages to all of a Coordinator's Volunteers  
[Help Topic 2194 \[pg:0403\]](#) - How to Send Messages to all of the Tagged Volunteers

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## How Volunteers & Coordinators Opt-in & Opt-out of Text Messaging

Help topic 1291

Added or revised 01-15-2015

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*This help topic is designed to show volunteers and Coordinators how to opt-in and opt-out of text messaging so they can receive text messages from the organization where they serve.*

You can click on a section of the help topic in the *Content* box below to go directly to that section.

### Contents

[Opt-in Process](#)  
[Opt-out Process & Changing Message Preferences](#)  
[Resume Opt-in](#)  
[If Your Phone Number Changes](#)

### **Opt-in Process**

Follow the steps below to start receiving text messaging from the organization you serve with.

#### **1. Sign-in to VicNet**

You use your VicNet account at the organization you volunteer at to opt-in to text messaging and control your text preferences. The VicNet account is necessary so the opt-in process complies with Federal communication regulations that specify that you can select what types of text messages you want to receive.

Most organizations place a link to VicNet somewhere on their web site. The login screen for the portal will look something like this:

**Your Logo Here**

**Login**

Enter your email address and your volunteer information center password, and then click the Go button.

Login name:

Password:

**Go**

[Forget your password?](#)

Enter the email address the organization has on file for you along with your VicNet password. If you forgot your password, you can find assistance [here \[pg:1975\]](#).

If you are unable to sign-in, please contact the volunteer office at the organization where you serve.

## 2. Go to the Account tab

Once you have signed-in, select the Account tab.

**Your Logo Here**

**Volunteer Information Center**

**Volunteer information for Jennifer Tutone**

Home Mail My Profile My Schedule My Service History Time Sheet **Account**

Check your schedule **News** New Volunteer

Some organizations may customize VicNet and/or the tabs so your account may look different and the tab may not be called *Account*. However, the tab you need will always be on the far right side. Some organizations may also place a **Text message opt-in** button on the Home tab. If you click this button you will be taken directly to the Account tab.

## 3. Enter your mobile device number and select your country

Type your mobile (cell) phone number into the *Enter a mobile phone number* field. There is not a need to enter a "1" or a country code in front of the number.

## Volunteer information for Jennifer Tutone

[Home](#)[Mail](#)[My Profile](#)[My Schedule](#)[My Service History](#)[Time Sheet](#)[Account](#)

### Message Preferences (Email / Text Messaging)

Use this section to opt-in and opt-out of text messaging (also known as "SMS"). You can change preferences for how you would like to receive messages, whether as emails, text messages, or none.

#### 1. Please Enter Your Mobile Device Number:

Volgistics Volunteer Alerts sends reminders, alerts, and custom messages from System Operators and Coordinators using text messaging (SMS). Please tell us where we can send messages:

Enter a mobile phone number

*This is a required field.*

Your country

*If outside U.S., this will help us determine which Country Code & format to use.*

**Supported Carriers:** AT&T, Sprint, Nextel, Boost, Verizon Wireless, U.S. Cellular®, T-Mobile®, Cellular One Dobson, Cincinnati Bell, Alltel, Virgin Mobile USA, Cellular South, Unicel, Centennial and Ntelos.

Use the *Your country* dropdown list to select the country your phone plan (or phone number) originates from.

The *Supported Carriers* list may not include the specific provider you use if you are outside of the United States. However, you should still be able to receive text messages.

#### 4. Select your preferences for how you would like to receive messages

Use the radio buttons by a message type to select how you would like to receive that type of message.

2. How do you prefer to receive these types of messages?

Automated Messages		
Text		
Email	Message	None
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

Schedule reminders  
Schedule alerts! Handy reminders to help you remember when you're scheduled to serve. Please remember to let your team leader know if you cannot make it!

Checklist reminders  
Reminder messages to help you remember if you're due for things such as training, TB tests, flu shots, etc.

Custom Messages		
Email	Email with Text Notification	None
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

Continuing education  
Be all that you can be! Updates on education programs including new course offerings, and times and locations for classes.

Electronic newsletters  
Stay informed! News about what's happening in the Volunteer Services Department.

Important information  
Only used to communicate important news that affects you. Please DO NOT opt-out of this type of message. We will only use it when we absolutely must get in touch with you.

Recruitment appeals  
We need you! Stay informed of new opportunities to serve.

Team leader update  
Information for Coordinators who lead volunteer teams. Volunteers will not need to opt-in to this message type.

Volunteer group update  
Information for volunteer group leaders. Individual volunteers will not need to opt-in to this type of message.

Messages can be sent just by email, by email with text notification, or you can select not to receive a certain type of message at all by selecting *None*. If *None* is selected for every message type, you will be opted-out of messaging.

When *Email with Text Notification* is selected, if the message is small enough that the entire message can be sent by text, you will only receive the text. However, if the message is too large for a text, you will receive the actual message by email (or on the Mail tab of VicNet) and a text to alert you that you received a message.

**Please Note:** Because text message delivery is often faster than email message delivery, you may receive the text notice that you have an email message before the actual email message is delivered. If the email message does not appear when you check the first time, please wait and try again later.

### 5. Select the time range for when you'd like your automated messages delivered

Use the *Time Zone* dropdown to select the location you're in and then select the start and end times for message delivery.

3. When would you like to receive *automated* messages, such as schedule reminders?

Between these hours:  and

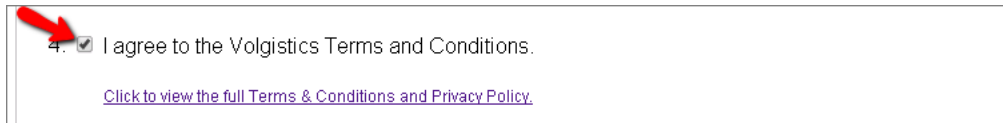
Your time zone:

The system will attempt to deliver your automated messages (Schedule and Checklist reminders) as close to the beginning time as possible. However, conditions such as the number of messages being sent, the load at the wireless carrier, and the geographic region you're in may cause the messages to arrive later in the time period or not at all.

**Please Note:** These settings only control the automated messages sent by the system. Custom messages from the account holders are processed as soon as they are sent so they may be delivered outside of the time range selected.

#### 6. Agree to the Terms and Conditions set by Volgistics

Check the box to indicate you agree to the Terms and Conditions Volgistics requires to participate in text messaging.



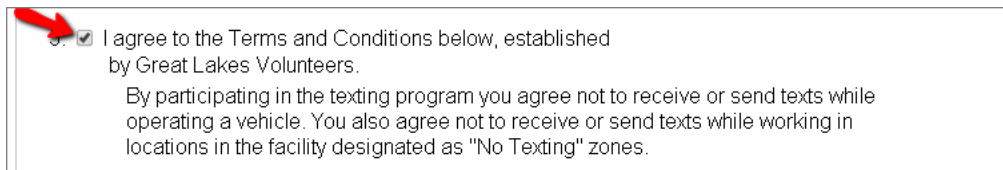
4.  I agree to the Volgistics Terms and Conditions.  
[Click to view the full Terms & Conditions and Privacy Policy.](#)

You can click the link to view the Terms and Conditions, or view them here.

**Please Note:** Depending on your mobile plan, you may be charged for text messages. By opting-in to text messaging you agree that any charges for text messaging or data use, caused by messages received as a participant are not the responsibility of Volgistics or the organization you serve with.

#### 7. Agree to any additional Terms and Conditions set by the organization you serve at

The organization you serve with may have additional Terms and Conditions they require for texting. In this case, you must check the box to indicate you agree to the additional Terms and Conditions set by your organization.



5.  I agree to the Terms and Conditions below, established by Great Lakes Volunteers.  
By participating in the texting program you agree not to receive or send texts while operating a vehicle. You also agree not to receive or send texts while working in locations in the facility designated as "No Texting" zones.

#### 8. Click the Save button

Click the **Save** button at the bottom of the page to keep your settings.

#### 9. Confirm that you have read the alert box

A pop-up window will appear reminding you that the next step of responding **Yes** to the opt-in text message is required to complete the opt-in process. Click the **OK** button to indicate you read this message.



The page at <https://www.volgistics.com> says:

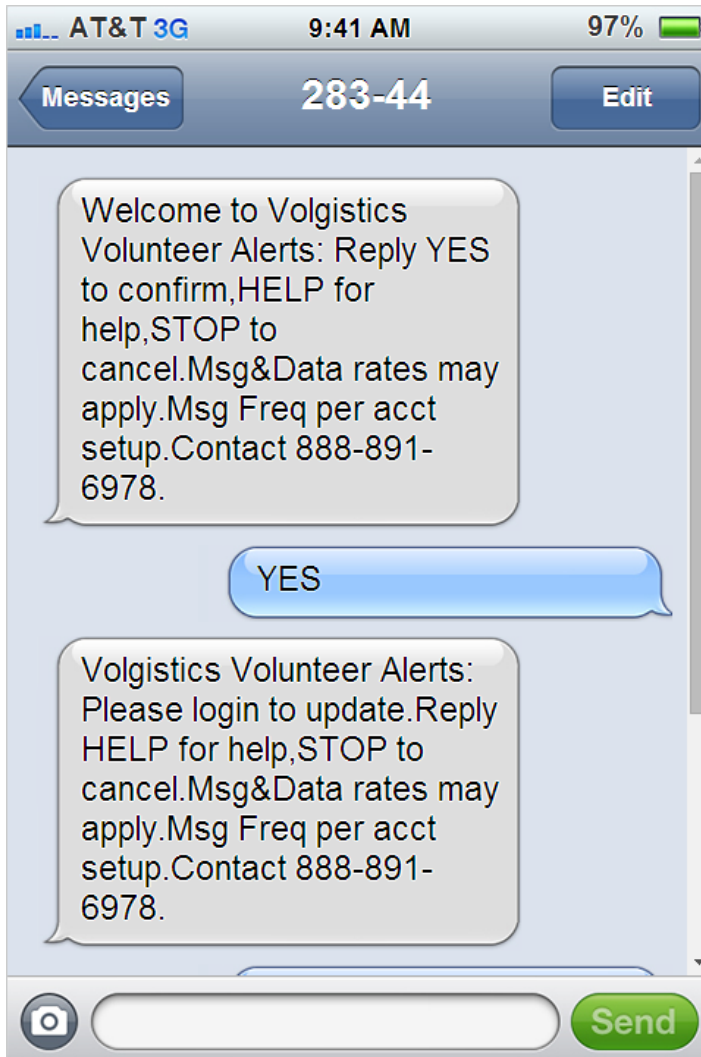


To complete the opt-in process,  
you must reply 'YES' in the message  
being sent to your phone.

OK

### 10. Respond to the opt-in text message

You will receive a text message on your mobile phone shortly after you finish step 9. You must respond **YES** to this text message to finish the opt-in process.




## Opt-out Process & Changing Message Preferences

You are free to opt-out of the text messaging or change your message preferences at any time. Your organization does not have a way to change your messages preferences or the settings for the times you receive the automatic messages. You will need to follow the steps shown if you want to change these settings.

Follow these steps to opt-out of text messaging or change your message preferences through the VicNet module:

### **1. Sign-in to VicNet**

Most organizations place a link to VicNet somewhere on their web site. The login screen for the portal will look something like this:



Enter the email address the organization has on file for you along with your VicNet password. If you forgot your password, you can find assistance [here \[pg:1975\]](#).

If you are unable to sign-in, please contact the volunteer office at the organization where you serve.

### **2. Go to the Account tab**

Once you have signed-in, select the Account tab.



Some organizations may customize VicNet and/or the tabs so your account may look different and the tab may not be called *Account*. However, the tab you need will always be on the far right side.

### **3. Check the *Opt-out of text messages (SMS)?* checkbox or change your preferences**

If you wish to opt-out, check the box in front of *Opt-out of text messages (SMS)?*

**Volunteer information for Jennifer Tutone**

Home Mail My Profile My Schedule My Service History Time Sheet Account

**Message Preferences (Email / Text Messaging)**  
Use this section to change preferences or opt-out of text messaging (also known as "SMS").

**Opt-out of text messages (SMS)?** You are currently opted-in.

1. How do you prefer to receive these types of messages?

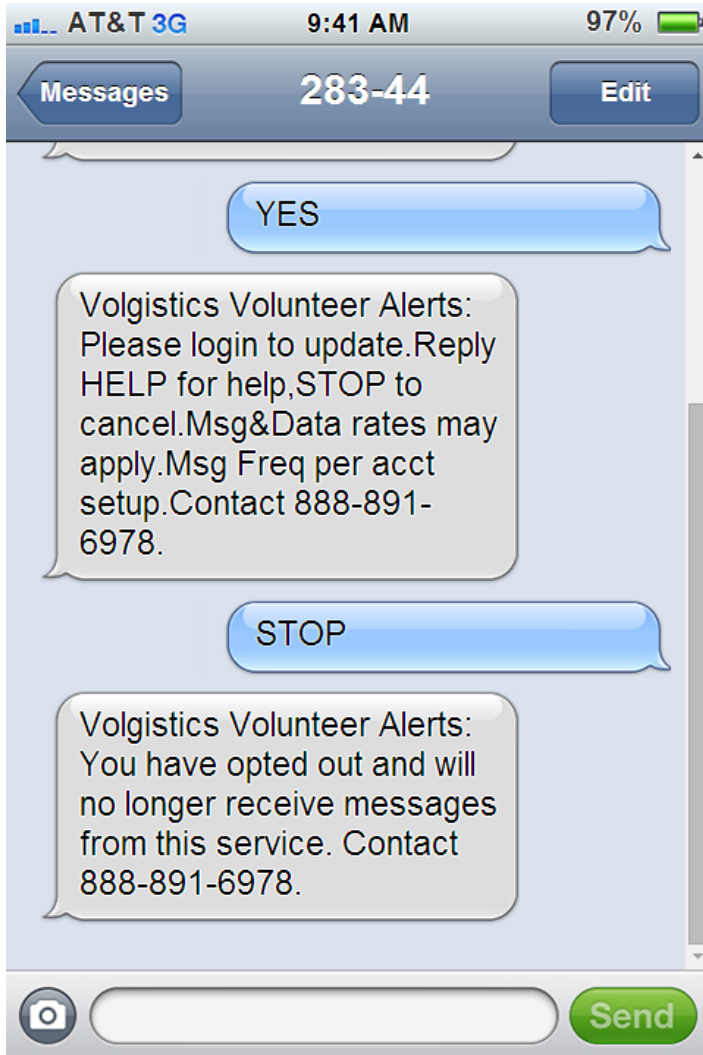
If you want to change your preferences for how you receive text messages instead of opting-out, adjust the settings for the types of message you prefer to receive and/or the times you wish to receive the automatic messages. Then proceed to step 4.

**4. Click the Save button**

Click the **Save** button at the bottom of the page to keep your settings.

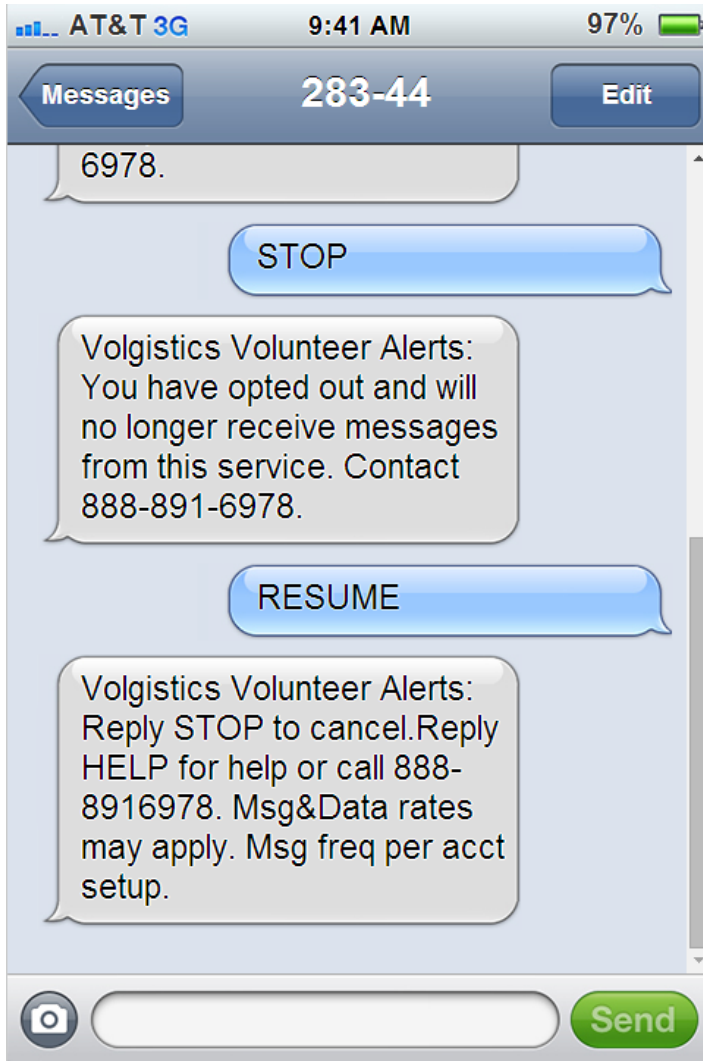
[Opt-out of text messaging without signing-in to VicNet](#)

You can also opt-out of texting without signing-in to VicNet. To do this, simply text **STOP** as a reply to a message you have received. In the United States, you can also text **STOP** to 28344.



### **Resume Opt-in**

If after opting-out you decide you want to opt back in, you can either follow the directions in the Opt-in Process section of this help topic, or simply text **RESUME** in response to a message you have received. In the United States, you can also text **RESUME** to 28344.



### **If Your Phone Number Changes**

Your organization does not have a way to update your phone number. If your mobile (cell) number changes, you will need to follow these steps if you need to change your number.

#### **1. Opt-out of text messaging at your old number**

Follow the steps shown in the Opt-out Process section of this help topic to opt-out of text messaging at your old number.

#### **2. Opt-in to text messaging at your new number**

Follow the steps shown in the Opt-in Process section of this help topic to opt-in to text messaging at your new number.

#### **Related Help**

[Help Topic 1147 \[pg:1745\]](#) - How to Sign-in and Sign-out at VicTouch: A Brief Guide for Volunteers

[Help Topic 1148 \[pg:1654\]](#) - How to use VicNet: A Brief Guide for Volunteers


[Help Topic 1215 \[pg:1676\]](#) - How to use VicNet Mobile: A Brief Guide for Volunteers

## Text Number Validity

Help topic 1292

Added or revised 06-18-2014

Volgistics helps you identify invalid text (cell phone) numbers in your volunteer records by placing a *text number validity* icon next the Text field on the **Core tab** [pg:1868] in each volunteer's record. An example of this appears below:

Cell:	<input type="text" value="(555) 867-5309"/>	<input checked="" type="checkbox"/> Ok to call
Text:	<input type="text" value="(555) 867-5309"/>	<input type="checkbox"/> 
Fax:	<input type="text" value="(800) 649-2568"/>	<input checked="" type="checkbox"/> Ok to call

This is what the text number validity icon means:

If the Text field is blank and this field does not show green, yellow or red, it means the volunteer or Coordinator has not opted-in to text messaging yet. If there is a number in the Text field and this field does not show green, yellow or red, then it means the volunteer did not respond **YES** to the opt-in confirmation message. It could also mean that the *No text message* box was checked and then un-checked.

All of the most recent text messages sent to this number were delivered without any failures. This indicates a valid text number.

At least one of the most recent text messages sent to this number failed. It may be that this is a valid mobile (cell) phone number, but other conditions caused the message to fail.

n invalid text number. There are four reasons that a text number could be marked invalid:

-*Invalid mobile phone number.* This can occur if the volunteer or Coordinator's number is no longer in service.

-*Not opted-in to text messaging.* This can occur if the volunteer was opted-in, but later used VicNet to opt-out. It can also occur if text messaging was disabled for the entire account.

-*The "No Text message" checkbox is checked.* This means the "No text message" box on the Core tab of the volunteer record (or the Coordinator tab of the Coordinator record) is checked.

-*Number is blocked; they must text 'RESUME'.* This means the volunteer or Coordinator has texted "STOP" to 28344 (in the United States) and must text "RESUME" to un-block themselves. In countries other than the U.S., the number may be different than 28344.

To determine which of these reasons apply to this text number, move your cursor over the red icon. Once a text number is identified as invalid, no additional text messages will be sent until the validity is changed.

### How Volgistics determines text number validity

Volgistics determines the text number's validity by looking at the results of the text messages you send. By default, Volgistics looks at the last three messages that were sent. If all three were delivered without failure, the number's validity is marked with the green icon. If one or two of last three messages sent failed, but at least one was successful, Volgistics marks the address with the yellow icon. If all of the last three messages sent failed, Volgistics changes the validity icon to red.

You can optionally [change the default failure threshold \[pg:0379\]](#) of these messages to another value in Setup.

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## How System Operators Opt-in & Opt-out of Text Messaging

Help topic 1293

Added or revised 07-08-2014

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*This help topic is designed to show [System Operators \[pg:0065\]](#) how to opt-in and opt-out of text messaging so they can receive text messages. If you need information on how System Operators can send text messages, please see [help topic 1295 \[pg:0343\]](#)*

You can click on a section of the help topic in the *Content* box below to go directly to that section.

### Contents

Opt-in Process

Opt-out Process & Changing Message Preferences

Resume Opt-in

If Your Phone Number Changes

Enable Application Alerts

Receive Self-Scheduling Alerts

## Opt-in Process

Follow the steps below to start receiving text message alerts as a System Operator.

1. If you are not logged-in to your account, [Login \[pg:0220\]](#) at [www.volgistics.com](http://www.volgistics.com). The first page you see will be the Welcome page. If you are already logged in, just select Welcome from the [menu \[pg:0215\]](#).
2. Click the link for the text message opt-in, opt-out and preferences.

**Welcome Alexandra Call**

**Account Statistics**

Volunteer records: 175  
Archived volunteer records: 3  
Cumulative hours of service: 15,641  
(as of yesterday) [Help](#)

**Birthdays**

This week

Sara Johnston	Jun 20
---------------	--------

[Help](#)

**Mail**

Your mailbox has:  
Pending applications: 7

**Volgistics Webinar Scheduled**

January 30, 2014 at 4pm Eastern Time

Join two member of the Volgistics support team as they discuss merit hours and the new travel time feature. Space is limited, so [register early!](#)

**Tip of the Week January 20, 2014**

*New Travel Time Merit Hours Feature*

The Travel Time Merit Hours feature allows you to add volunteer service to recognize time spent traveling to volunteer. Please click [here](#) to read more.

You can find tips from previous weeks in our [blog](#).

[Change your Volgistics password](#)

[Text message \(SMS\) operator opt-in, opt-out, preferences](#)

System Operators with access to [Setup \[pg:0887\]](#) on the menu can also get to this page by selecting *Setup* from the menu, expanding the *Messages* link, and then selecting *Text message (SMS) operator opt-in, opt-out, preferences*.

3. Enter your mobile phone number and select your country.

Type your mobile (cell) phone number into the *Enter a mobile phone number* field. There is not a need to enter a "1" or a country code in front of the number.



## 1. Please Enter Your Mobile Device Number:

Volgistics Volunteer Alerts sends reminders, alerts, and custom messages from System Operators over SMS. Please tell us where we can send messages:

Enter a mobile phone number

*This is a required field.*

Your country

*If outside U.S., this will help us determine which Country Code & format to use.*

**Supported Carriers:** AT&T, Sprint, Nextel, Boost, Verizon Wireless, U.S. Cellular®, T-Mobile®, Cellular One Dobson, Cincinnati Bell, Alltel, Virgin Mobile USA, Cellular South, Unicel, Centennial and Ntelos.

Use the *Your country* dropdown list to select the country your phone plan (or phone number) originates from.

The *Supported Carriers* list may not include the specific provider you use if you are outside of the United States. However, you should still be able to receive text messages.

4. Select the time range you'd like your text messages delivered between.

Use the dropdown lists to select the times you'd like to receive alerts between. The time settings will use the time zone recorded on the [System Operator page](#) [ ] for your record.

## 2. When would you like to receive *automated* messages?

Between these hours:  and

The system will deliver the alerts as they occur as long as they happen between the hours selected. If alerts occur outside of the time range, the system will attempt to deliver the alerts as close to the beginning time as possible. However, conditions such as the number of messages being sent, the load at the wireless carrier, and the geographic region you're in may cause the messages to arrive later in the time period or not at all.

## 5. Agree to the Terms and Conditions set by Volgistics

Check the box to indicate you agree to the Terms and Conditions Volgistics requires to participate in text messaging.

## 3. I agree to the Volgistics Terms and Conditions.

[Click to view the full Terms & Conditions and Privacy Policy.](#)

You can click the link to view the Terms and Conditions, or view them here.

**Please Note:** Depending on your mobile plan, you may be charged for text messages. By opting-in to text messaging you agree that any charges for text messages received as a participant are not the responsibility of Volgistics or the organization you serve with.

## 6. Agree to any additional Terms and Conditions set by the organization you serve at

The organization you serve with may have additional Terms and Conditions they require for texting. In this case, you must check the box to indicate you agree to the additional Terms and Conditions set by your organization.

4.  I agree to the Great Lakes Volunteers Terms and Conditions.

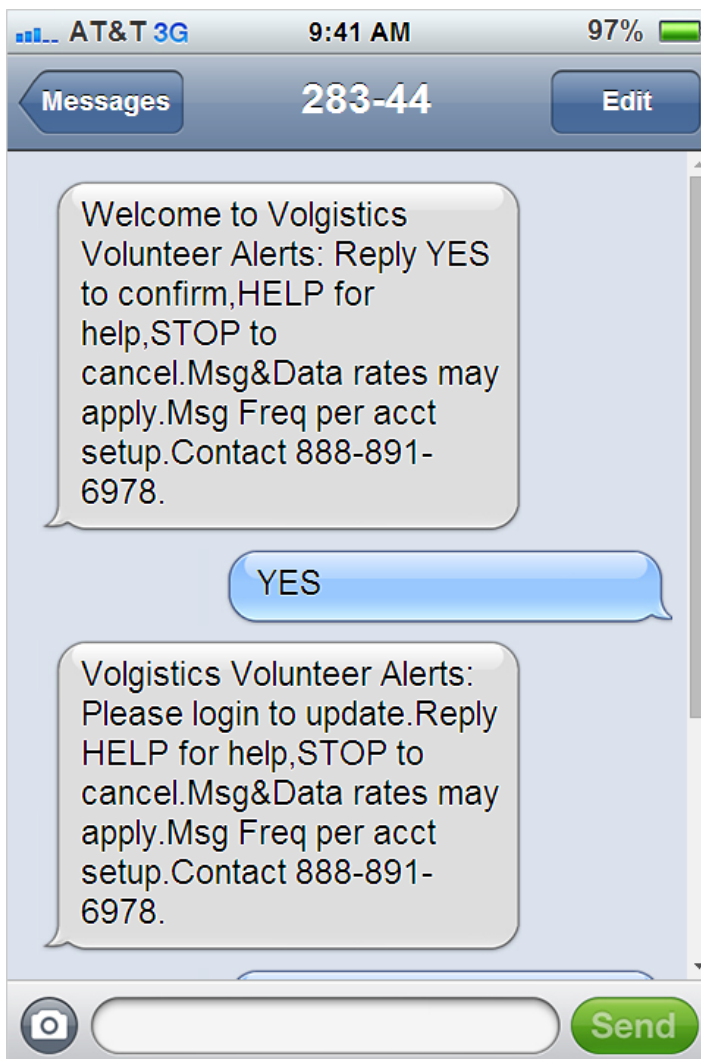
By participating in the texting program you agree not to receive or send texts while operating a vehicle. You also agree not to receive or send texts while working in locations in the facility designated as "No Texting" zones.

7. Click the **Submit** button

Click the **Submit** button at the bottom of the page to keep your settings.

8. Respond to the opt-in text message

You will receive a text message on your mobile phone shortly after you finish step 7. You must respond **YES** to this text message to finish the opt-in process.

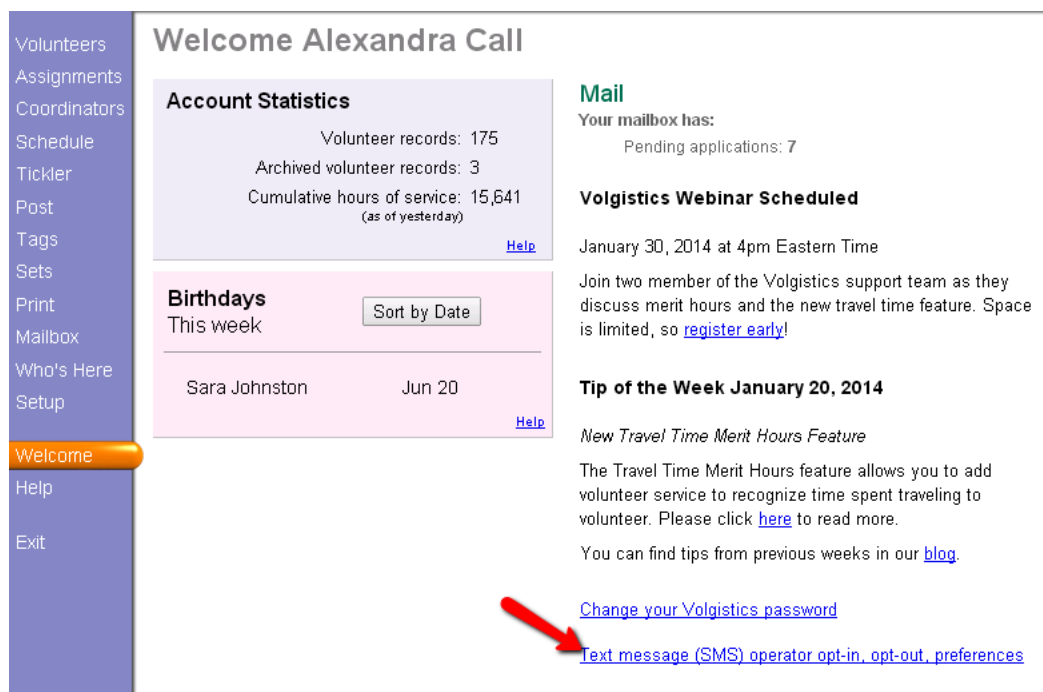


## Opt-out Process & Changing Message Preferences

You are free to opt-out of the text messaging or change your message preferences at any time.

Follow these steps to opt-out of text messaging or change your message preferences through your account:

1. If you are not logged-in to your account, [Login \[pg:0220\]](#) at [www.volgistics.com](http://www.volgistics.com). The first page you see will be the Welcome page. If you are already logged in, just select Welcome from the [menu \[pg:0215\]](#).
2. Click the link for the text message opt-in, opt-out and preferences.



The screenshot shows the Volgistics user interface for Alexandra Call. The left sidebar contains navigation links: Volunteers, Assignments, Coordinators, Schedule, Tickler, Post, Tags, Sets, Print, Mailbox, Who's Here, Setup, Welcome (highlighted), Help, and Exit. The main content area is titled 'Welcome Alexandra Call' and contains several sections: 'Account Statistics' (Volunteer records: 175, Archived volunteer records: 3, Cumulative hours of service: 15,641), 'Birthdays' (This week: Sara Johnston, Jun 20), 'Mail' (Your mailbox has: Pending applications: 7), 'Volgistics Webinar Scheduled' (January 30, 2014 at 4pm Eastern Time), and 'Tip of the Week January 20, 2014' (New Travel Time Merit Hours Feature). At the bottom of the page, a red arrow points to the link 'Text message (SMS) operator opt-in, opt-out, preferences'.

System Operators with access to [Setup \[pg:0887\]](#) on the menu can also get to this page by selecting *Setup* from the menu, expanding the *Messages* link, and then selecting *Text message (SMS) operator opt-in, opt-out, preferences*.

3. To opt-out, check the box at the top of the page. Otherwise, change your time preferences.

**You are already opted-in, would you like to opt-out (no longer receive text messages)?**

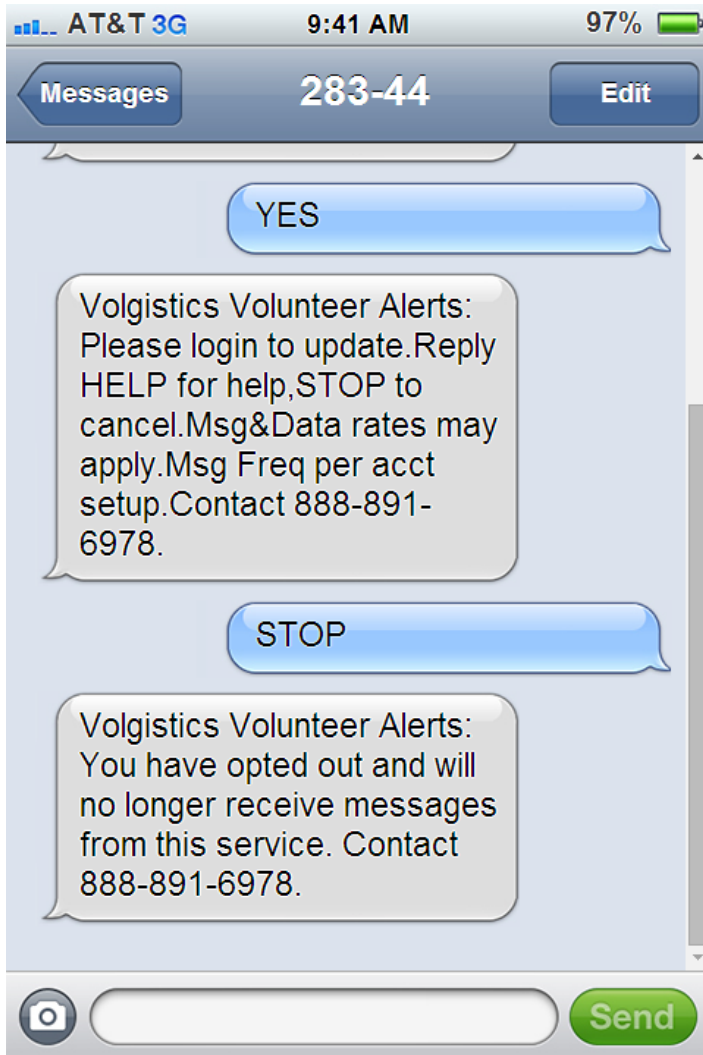
### **1. Please Enter Your Mobile Device Number:**

Volgistics Volunteer Alerts sends reminders, alerts, and custom messages from

4. Click the **Submit** button at the bottom of the page.

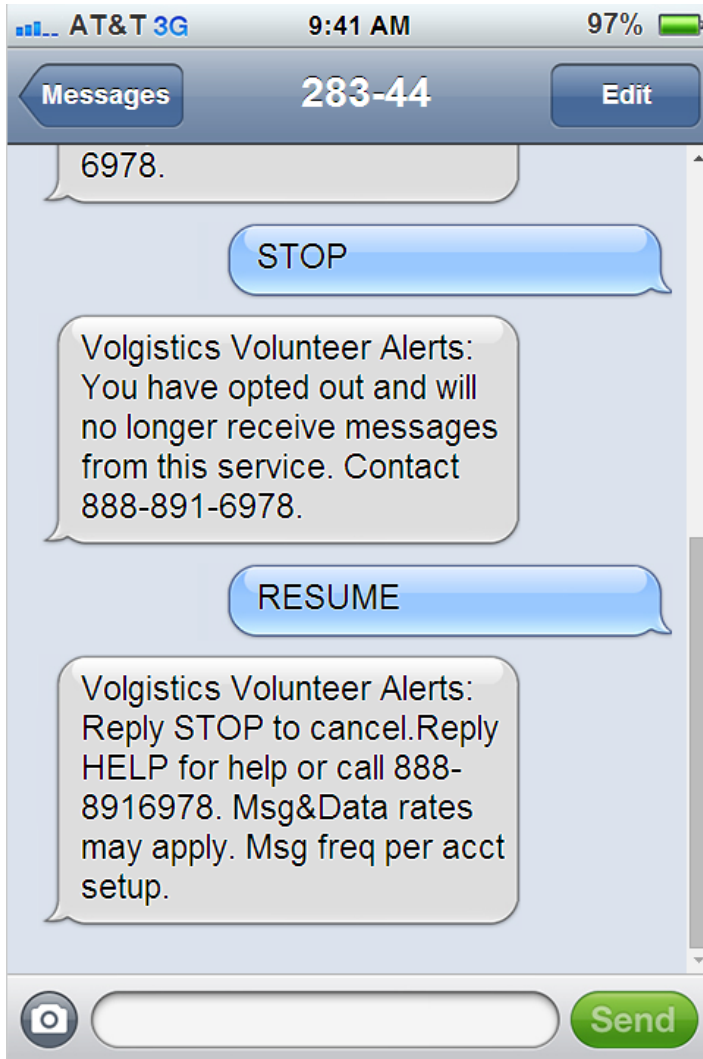
## Opt-out of text messaging without signing-in to your account

You can also opt-out of texting without signing-in to your Volgistics account. To do this, simply text **STOP** as a reply to a message you have received. In the United States, you can also text **STOP** to 28344.



### **Resume Opt-in**

If after opting-out you decide you want to opt back in, you can either follow the directions in the Opt-in Process section of this help topic, or simply text **RESUME** in response to a message you have received. In the United States, you can also text **RESUME** to 28344.



### **If Your Phone Number Changes**

If your mobile (cell) number changes, you will need to follow these steps if you need to change your number.

1. Opt-out of text messaging at your old number

Follow the steps shown in the Opt-out Process section of this help topic to opt-out of text messaging at your old number.

2. Opt-in to text messaging at your new number

Follow the steps shown in the Opt-in Process section of this help topic to opt-in to text messaging at your new number.

### **Enable Application Alerts**

At this time, the only alerts that [System Operators \[pg:0065\]](#) can receive by text are the alerts that an application has been submitted. If you'd like to enable these alerts:

1. Select [Setup \[pg:0887\]](#) from the menu.
2. Expand the *Online forms* link.
3. Select *Volunteer application forms*.
4. Select the name of a form you'd like the alerts sent for.
5. Scroll down to the

### Alerts

heading, make sure your name is selected from the dropdown list, and check the box by the option to send the alerts by text message. You can optionally receive the alerts on the [In Box \[pg:0303\]](#) tab of the Volgistics mailbox or by email to the email address listed on your [System Operator record \[\\_\\_\\_\\_\\_\]](#).

6. Click the **Save** button at the bottom or top of the page to keep your changes.

### Receive Self-Scheduling Alerts

While there is not a way to receive text messages as a System Operator other than the ones sent when an application form is submitted, you can receive text alerts when volunteers add or remove themselves from an assignment's schedule through [VicNet \[pg:1724\]](#) or [VicTouch \[pg:1778\]](#). To do this, you will need to give yourself a [Coordinator \[pg:0163\]](#) record as well as a [System Operator \[pg:0065\]](#) record. Because your account's [service fee \[pg:0710\]](#) is not based on the number of Coordinator records, you do not need to worry about this increasing your expenses.

Here is what you will need to do:

1. Setup a Coordinator record in the account for yourself. [Help topic 1111 \[pg:0163\]](#) shows how to do this. Be sure to choose the assignments you want to receive the schedule alerts for on the *Assignments* tab of the record.
2. Set a temporary password for the record on the *Vic* tab as shown in the *Set temporary password* section of [help topic 2234 \[pg:1717\]](#).
3. Sign-in to the VicNet portal for your organization with the temporary password and choose a permanent password for the record. You can find directions on how to do this [here \[\\_\\_\\_\\_\\_\]](#).
4. Opt-in to text messaging as shown in [help topic 1291 \[pg:0323\]](#). Please note that if you do not want to receive other messages for the Coordinator record (such as [Schedule Reminders \[pg:0791\]](#) or custom [message types \[pg:1321\]](#)), you can opt-out of these when you are enabling text messaging for the Coordinator.

## Related help

- [Help Topic 1023 \[pg:1321\]](#) - Message Types
- [Help Topic 1025 \[pg:1325\]](#) - Coordinator Message Preferences
- [Help Topic 1068 \[pg:1327\]](#) - Volunteer Message Preferences
- [Help Topic 1290 \[pg:0321\]](#) - How to Enable Text Messaging for Your Account
- [Help Topic 1291 \[pg:0323\]](#) - How Volunteers & Coordinators Opt-in & Opt-out of Text Messaging
- [Help Topic 1292 \[pg:0333\]](#) - Text Message Validity
- [Help Topic 1293 \[pg:0334\]](#) - How System Operators Opt-in & Opt-out of Text Messaging
- [Help Topic 1294 \[pg:0342\]](#) - How to Disable Text Messaging for Your Account
- [Help Topic 1295 \[pg:0343\]](#) - How to Send a Text Message
- [Help Topic 1296 \[pg:0837\]](#) - Find Volunteers with Invalid Text Numbers
- [Help Topic 1297 \[pg:0837\]](#) - Their Text Message Set Rule
- [Help Topic 1298 \[pg:0840\]](#) - Their Text Message Validity Set Rule
- [Help Topic 1299 \[pg:0347\]](#) - Using Email and Text Messages Together
- [Help Topic 1300 \[pg:1966\]](#) - Text Messaging
- [Help Topic 1301 \[pg:1971\]](#) - Text Messaging
- [Help Topic 1991 \[pg:1978\]](#) - Mailbox Out Box Tab
- [Help Topic 2100 \[pg:0381\]](#) - Introduction to Message Preferences
- [Help Topic 2185 \[pg:0396\]](#) - How to Send Messages to the Volunteers in a Set
- [Help Topic 2192 \[pg:0401\]](#) - How to Send Messages to the Volunteers Scheduled on a Certain Day
- [Help Topic 2193 \[pg:0402\]](#) - How to Send Messages to all of a Coordinator's Volunteers
- [Help Topic 2194 \[pg:0403\]](#) - How to Send Messages to all of the Tagged Volunteers

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## How to Disable Text Messaging for Your Account

Help topic 1294

Added or revised 07-23-2014

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If you no longer want to use text messaging (SMS) in your account, an [Administrator \[pg:0052\]](#) for your account will need to disable the feature. To disable text messaging:

1. Select [Setup \[pg:0887\]](#) from the menu.
2. Expand the *Messages* link.
3. Select *Ground Rules*.
4. Scroll down to the *Text Messaging (SMS) Ground Rules* section.
5. Select the *Do not allow text messaging* option.
6. A pop-up window will appear explaining how disabling text messaging will affect your account. (See the box below for more details on this.) Click the **OK** button to proceed.
7. Enter the password associated with an [Administrator's \[pg:0052\]](#) login credentials and click the **Save** button.

### What Happens When You Disable Text Messaging

When text messaging is disabled for your account, all volunteers, [Coordinators \[pg:0163\]](#), and [System Operators \[pg:0065\]](#) who are opted-in for text messaging will receive a final alert that says your organization no longer uses text messaging. Volunteers and Coordinators will have their [message preferences \[pg:0381\]](#)

switched from text to email when possible. System Operators will have their [application alerts \[ \]](#) switched from text to email.

If you [enable text messaging \[pg:0321\]](#) in your account again, people who wish to receive text messages will need to repeat the opt-in process. [Help topic 1291 \[pg:0323\]](#) shows how to do this for volunteers and Coordinators. [Help topic 1293 \[pg:0334\]](#) shows how to do this for System Operators.

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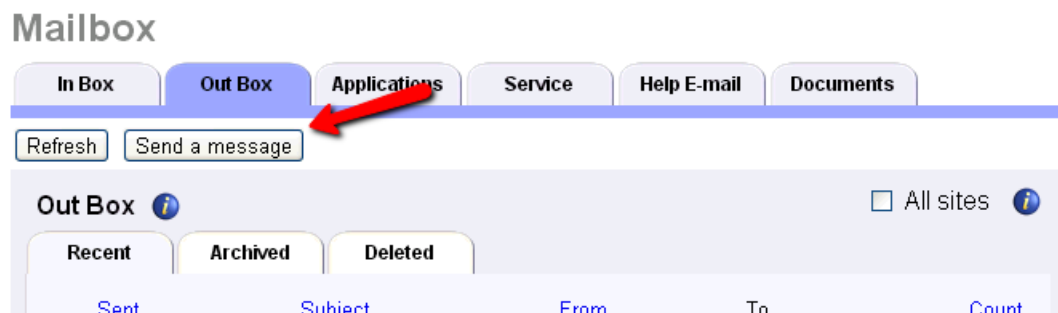
## How to Send a Text Message

Help topic 1295

Added or revised 06-18-2014

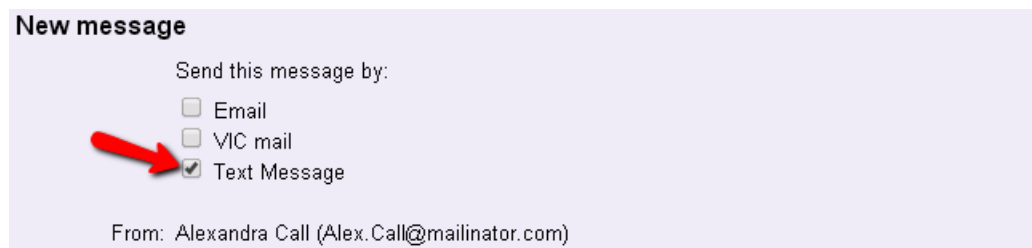
---

This help topic explains how to compose and send a new text message to volunteers and/or [Coordinators \[pg:0163\]](#) from the Volgistics Mailbox. If you're not already on the "New Message" window, you can get there by selecting "Mailbox" from the [menu \[pg:0215\]](#), clicking the "Out Box" tab, and then clicking the **Send a message** button.



In order to receive messages by text, the volunteers and Coordinators must opt-in to text messaging first. [Help topic 1291 \[pg:0323\]](#) explains how they do this.

### 1. Use the *Send this message by* option to select how you'd like your message sent.



Check the "Text Message" checkbox to send this message by text/SMS. When this option is checked, it limits the message field to 110 characters. If your account does not have [text messaging enabled \[pg:0321\]](#), you will not see the "Text Message" option.

You can optionally check the "Email" and/or "Vic mail" boxes if you want volunteers to receive the message by more than one method.

When the "Email" option is checked, it enables the HTML formatting options so you can use features such as different fonts, text colors, pictures and tables in your messages. [Help topic 1026 \[pg:0295\]](#) explains more about using the HTML formatting. You may also find [help topic 2195 \[pg:0404\]](#) useful because it explains more about sending email messages.



When the "VIC mail" checkbox is checked, the volunteers will receive the message when they visit [VicNet \[pg:1724\]](#) or [VicTouch \[pg:1778\]](#). See [help topic 1127 \[pg:0315\]](#) for more information on how to send a Vic mail message.

## 2. Choose who will receive your message.

Use the "To" section to specify which volunteers and/or Coordinators this message should be sent to.

To: Volunteers

Tutone, Jennifer ▼

Tagged volunteers (0)

All Active ▼ volunteers

All of the volunteers in this Set: 2012 Volunteers ▼

All volunteers

Coordinators

▼

All coordinators (7)

- To send your message to an individual volunteer, check the box for this and select the volunteer's name from the dropdown list.
- To send your message to all of the tagged volunteers, check the "Tagged volunteers" checkbox. See [Help topic 2194 \[pg:0403\]](#) if you need more help with this.
- To send your message to all volunteers with a specific [Status \[pg:1832\]](#) (such as all Active volunteers), check the box for this and select the Status of the volunteers you want to send the message to.
- Check "All of the volunteers in this Set" and then choose a [Set \[pg:0858\]](#) if you want to send your message to all of the volunteers included in the Set.
  - To send your message to every volunteer in your database no matter what their Status is, check the "All volunteers" checkbox. Please note that this will not send the message to [archived \[pg:0709\]](#) volunteer records because archived volunteers cannot receive messages.
- To send your message to an individual Coordinator, check the box for this and select the Coordinator's name from the Coordinators dropdown list.
- Check the "All coordinators" checkbox to send your message to all Coordinators.

### Please Note

You can combine checkboxes to send a message to more than one group. For example, if you need to send a message to all volunteers with the Applicant Status plus just one volunteer with the Active Status, you could use the Status dropdown and select the Applicant Status and then select the one volunteer's name from the individual option.

### 3. Choose a Message type for your message if necessary

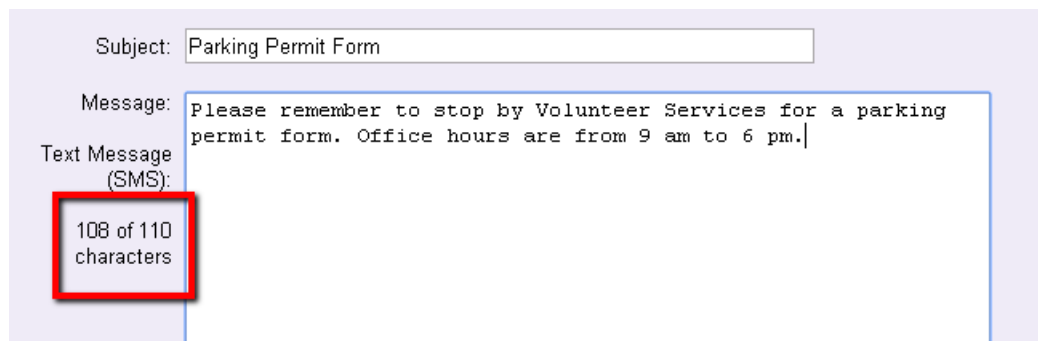
If your message is going to more than one volunteer and/or Coordinator, you must select a message type from the dropdown. The *Message type* field works with the [Message Preference \[pg:0381\]](#) feature to allow volunteers and Coordinators to select what kinds of messages they want to receive. You can add new message types by following the directions in [help topic 1023 \[pg:1321\]](#). The first message type listed on your list of types will show as the default in the dropdown list.

### 4. Enter a *Subject* for your message.

You must enter a subject for the message. This field cannot be left blank. The subject will not be part of the text message, but it is necessary because it identifies the sent message on the [Out Box \[pg:1978\]](#) and in the [message history \[pg:0370\]](#) on the volunteer record.

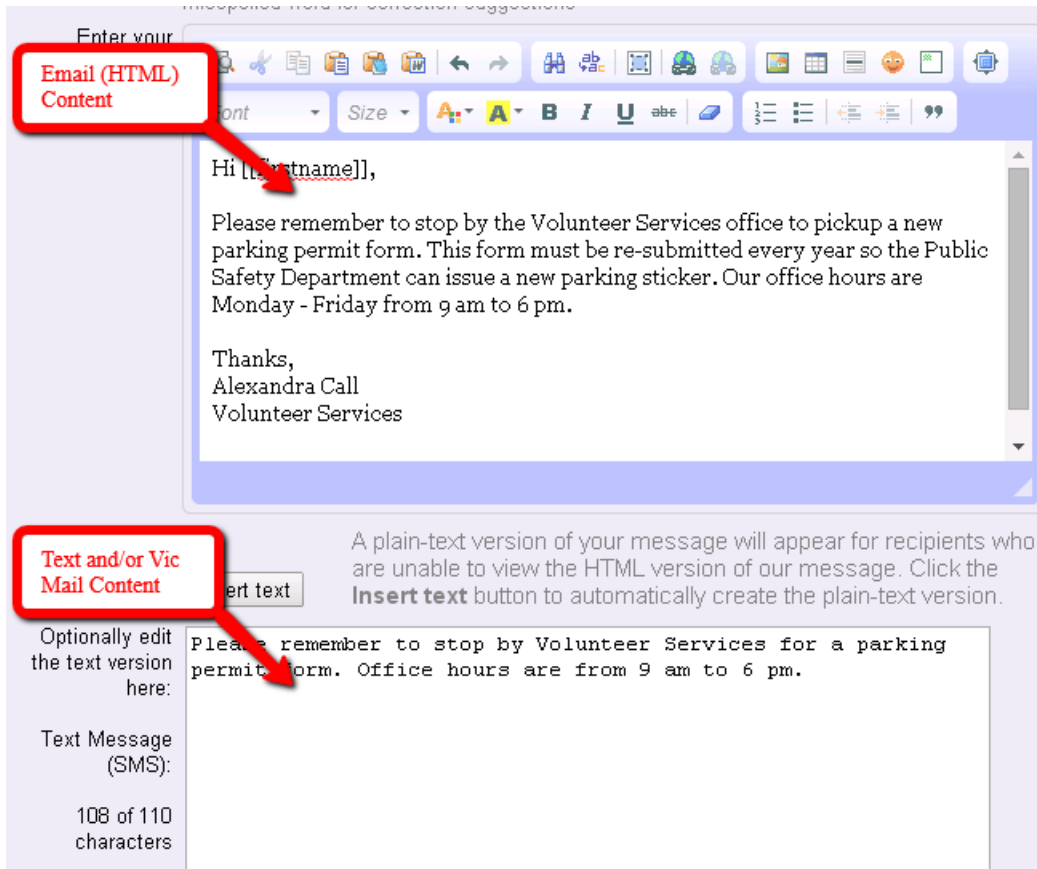
### 5. Compose your *Message*.

Enter your message in the message text area. Please note that if your message exceeds 110 characters it cannot be sent as a text message. In this case, the system will send a text notification about the message to the volunteer or Coordinator and send the actual message by email. If the volunteer or Coordinator is unable to receive email, the system will send the message by Vic mail. There is a counter beside the field to help you keep track of the number of characters used.



The screenshot shows a web form for composing a message. At the top, there is a "Subject:" label followed by a text input field containing "Parking Permit Form". Below this is a "Message:" label followed by a larger text area containing the text: "Please remember to stop by Volunteer Services for a parking permit form. Office hours are from 9 am to 6 pm." To the left of the message text area, there is a label "Text Message (SMS):" and a small box with a red border containing the text "108 of 110 characters".

If you select to have your message delivered by email and text (or email, Vic mail and text) in step 1, there will be two message windows for composing your message. Enter the information you want the recipients to see in the email messages in the top window. Enter the information you want recipients to see in the Text and Vic mail messages in the bottom window.



## Spell Checking

Because most web browsers have spell check features, or have the ability to add one with a toolbar option, there is not a built-in spell check feature in the message windows. If you need information on using or adding spell check to your browser, please see [help topic 2318 \[pg:1624\]](#). To check for spelling options for a word identified by your spell check in messages, hold down the Control (CTRL) or Command (CMD) key on your keyboard then right-click on the identified word.

## 6. Send or save your message.

Click the **Send now** button to send your message right away. If you want to save your message and send it later, click the **Save to send later** button. This option also allows you to save a draft copy of a message you're working on so you can complete it later.

To return to, or send, a message you've saved:

1. Choose "Mailbox" from the [menu \[pg:0215\]](#).
2. Select the "Out Box" tab.
3. Click the subject line of the message you saved.
4. When you're ready to send the message, click the **Send now** button

## Related help

[Help Topic 1023 \[pg:1321\]](#) - Message Types  
[Help Topic 1025 \[pg:1325\]](#) - Coordinator Message Preferences  
[Help Topic 1068 \[pg:1327\]](#) - Volunteer Message Preferences  
[Help Topic 1290 \[pg:0321\]](#) - How to Enable Text Messaging for Your Account  
[Help Topic 1291 \[pg:0323\]](#) - How Volunteers & Coordinators Opt-in & Opt-out of Text Messaging  
[Help Topic 1292 \[pg:0333\]](#) - Text Message Validity  
[Help Topic 1293 \[pg:0334\]](#) - How System Operators Opt-in & Opt-out of Text Messaging  
[Help Topic 1294 \[pg:0342\]](#) - How to Disable Text Messaging for Your Account  
[Help Topic 1295 \[pg:0343\]](#) - How to Send a Text Message  
[Help Topic 1296 \[pg:0837\]](#) - Find Volunteers with Invalid Text Numbers  
[Help Topic 1297 \[pg:0837\]](#) - Their Text Message Set Rule  
[Help Topic 1298 \[pg:0840\]](#) - Their Text Message Validity Set Rule  
[Help Topic 1299 \[pg:0347\]](#) - Using Email and Text Messages Together  
[Help Topic 1300 \[pg:1966\]](#) - Text Messaging  
[Help Topic 1301 \[pg:1971\]](#) - Text Messaging  
[Help Topic 1991 \[pg:1978\]](#) - Mailbox Out Box Tab  
[Help Topic 2100 \[pg:0381\]](#) - Introduction to Message Preferences  
[Help Topic 2185 \[pg:0396\]](#) - How to Send Messages to the Volunteers in a Set  
[Help Topic 2192 \[pg:0401\]](#) - How to Send Messages to the Volunteers Scheduled on a Certain Day  
[Help Topic 2193 \[pg:0402\]](#) - How to Send Messages to all of a Coordinator's Volunteers  
[Help Topic 2194 \[pg:0403\]](#) - How to Send Messages to all of the Tagged Volunteers

---

## Using Email and Text Messages Together

Help topic 1299

Added or revised 03-03-2017

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You can send a single message with email and text versions of the message to volunteers. [Help topic 1295 \[pg:0343\]](#) shows how to do this. However, you may find it easier to send separate messages to just volunteers who want to receive the message by text, or just the volunteers who want to receive it by email. You can do this by creating [Sets \[pg:0858\]](#) to identify the different groups of volunteers. This also makes it possible to send messages to just volunteers who want to receive the message by a certain method.

### Make a Set to Identify the Text Group

To identify volunteers who have selected to receive text messages, you can use the [Their text message \[pg:0837\]](#) Set rule to find volunteers with a mobile number recorded and add the [Their text number validity \[pg:0840\]](#) Set rule to check if messages can be sent to the number. Here is how this will look:

## Include volunteers in this set if...

### Their text messages

Rule

- They  have  do not have a text message mobile phone number recorded
- They  want to receive  do not want to receive  text messages
- 'No text message'  is checked  is not checked

[Help](#)

### Their text number validity

Rule

- Their text number validity  is any of these...  is not any of these...
- (undetermined)
- (good - no recent failures)
- (some failures)
- (invalid mobile phone number)
- (Not opted-in to text messaging)
- (The 'No text message' checkbox is checked)
- (They opted out by sending "STOP")

[Help](#)

## This set has 2 rules...

- Include volunteers in this Set only if they pass **every one** of these rules
- Include volunteers in this Set if they pass **any single one** of these rules

You can also fine tune your search further by adding the [Their text message \[pg:0837\]](#) Set rule again and checking if the volunteer wants to receive a certain [type of message \[pg:1321\]](#). For example, let's say you just found out you will need additional volunteers to fill today's schedule so you want to send a text blast because it is quicker than email. The following image shows how to use the "Their text message" rule again to limit the Set to volunteers who want to receive *Recruitment appeals*:

## Include volunteers in this set if...

### Their text messages

Rule

They  have  do not have a text message mobile phone number recorded

They  want to receive  do not want to receive  text messages

'No text message'  is checked  is not checked

[Help](#)

### Their text number validity

Rule

Their text number validity  is any of these...  is not any of these...

(undetermined)

(good - no recent failures)

(some failures)

(invalid mobile phone number)

(Not opted-in to text messaging)

(The 'No text message' checkbox is checked)

(They opted out by sending "STOP")

[Help](#)

### Their text messages

Rule

They  have  do not have a text message mobile phone number recorded

They  want to receive  do not want to receive  text messages

'No text message'  is checked  is not checked

[Help](#)

### Please note!

You could select the *undetermined* option for the *Their text number validity* rule but in most cases these volunteers will not receive text messages. The most common reason the text validity shows as undetermined is if a volunteer is not totally opted-in. This occurs if the volunteer fails to respond with *YES* when they receive the initial text asking them to confirm that they want to opt-in. These volunteers will *not* receive text messages.

A volunteer's text validity may also show as undetermined if the "No text message" box was checked, saved, and then un-checked and saved. These volunteers *will* receive text messages as long as they were still opted-in when this occurred.

### Make a Set to Identify the Email Group

To identify volunteers who have selected to receive email messages, you can use the [Their email \[pg:0806\]](#) Set rule to find volunteers with an email address recorded; the [Their email validity \[pg:0807\]](#) Set rule to check if messages can be sent to the email address; and then the [Their text message \[pg:0837\]](#) Set rule to rule out if they want to receive text messages. Here is how this will look:

**Their email**
Rule

They  have  do not have an email address recorded

They  want to receive  do not want to receive Continuing education email

'No email'  is checked  is not checked

[Help](#)

---

**Their email validity**
Rule

Their email address validity  is any of these...  is not any of these...

(undetermined)

(good)

(some failures)

(invalid email address)

(recipient opted-out)

('No email' is checked)

[Help](#)

---

**Their text messages**
Rule

They  have  do not have a text message mobile phone number recorded

They  want to receive  do not want to receive Continuing education text messages

'No text message'  is checked  is not checked

[Help](#)

**This set has 3 rules...**

Include volunteers in this Set only if they pass **every one** of these rules

Include volunteers in this Set if they pass **any single one** of these rules

Like the text message group, you can fine tune your search further by adding the [Their email \[pg:0806\]](#) Set rule again to search for if the volunteer wants to receive a certain [type of message \[pg:1321\]](#).

## Sending Your Message

Once you have made the Sets to identify the volunteers who want to receive messages through a certain method, you can send your message in a couple of different ways. One way is through the [Out Box \[pg:1978\]](#) tab as shown in [help topic 2185 \[pg:0396\]](#). Another is through the Volunteers page. Here is how to do this:

1. Select Volunteers from the [menu \[pg:0215\]](#).
2. Click the *Clear* link to make sure there are no Include options selected.

## 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](#)

### Include

Status:  Any ▼


Type:  **Adult Volunteer** ▼


Flag:  **Approved Driver** ▼

Site:  Any ▼

Set:  Any ▼

Tags:  Any ▼

Kind:  Any ▼


 [↑ Clear](#)


3. Select the name of the Set you want to send the message to from the Set dropdown and then click the *All* link.


## 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](#)


### Include

Status:  Any ▼


Type:  Any ▼


Flag:  Any ▼

Site:  Any ▼

Set:  **Text Message Group** ▼

Tags:  Any ▼

Kind:  Any ▼

 [↑ Clear](#)

4. Click the *Messages* icon to start your message to the volunteers in the Set.

[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
------	-----

5. Select the delivery method for your message.



## New message

Send this message by:

- Email
- VIC mail
- Text Message

6. Compose your message and send it out.

---

## Text Messaging

Help topic 1300

Added or revised 09-23-2016

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*This help topic reviews the different types of text messages that can be sent from your account. It also contains some examples of what recipients will see when they receive a message.*

You can click a link in the *Contents* box to go directly to a section of the help topic.

### Contents

Custom Text Messages

Types of Automatic Text Messages

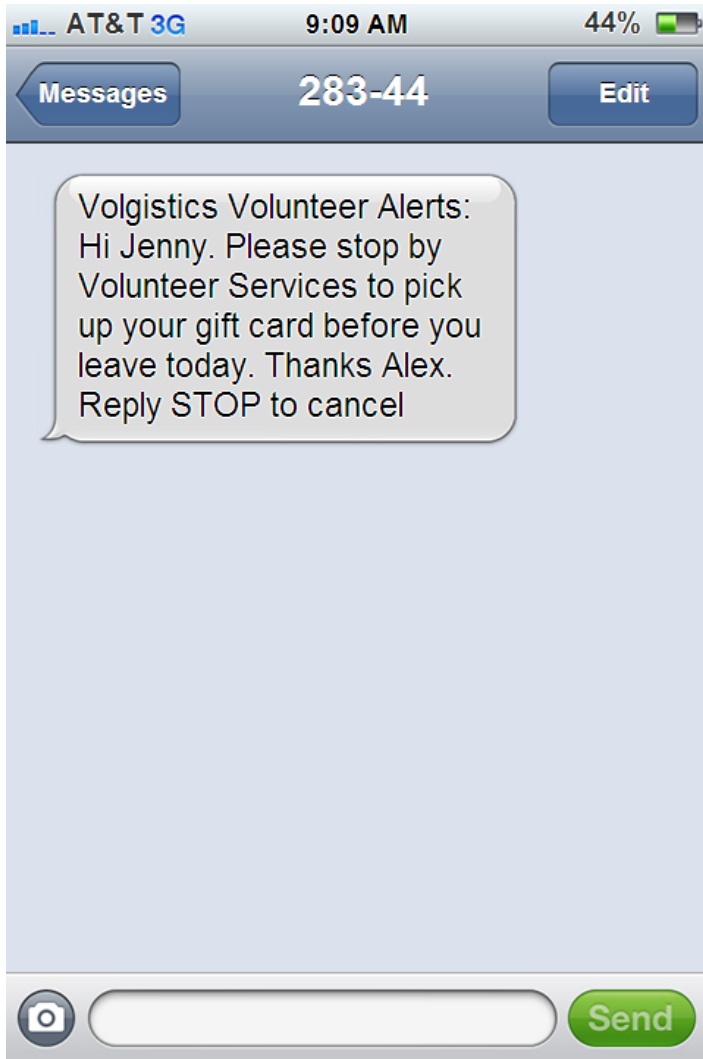
Content for Automatic Text Messages

Outgoing Messages Only

### Custom Text Messages

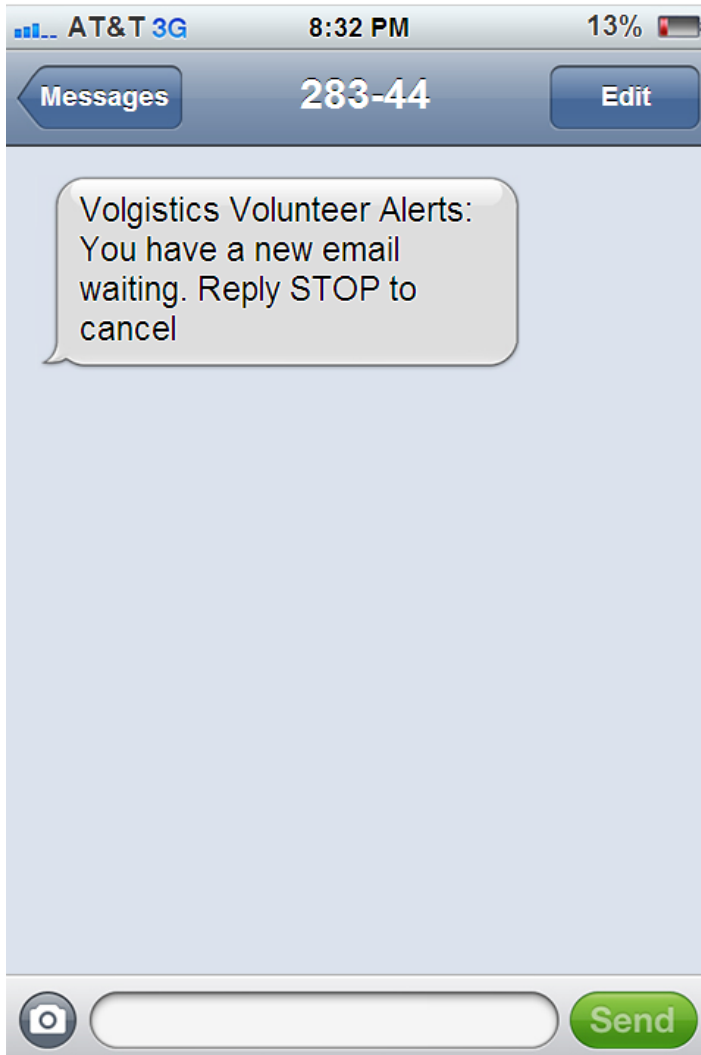
The texting feature provides a great new way to communicate with your volunteers. Younger volunteers may prefer to receive messages by text instead of email. You may also have times when you want to communicate with your volunteers while they are serving. For example, if you need to see a volunteer who is serving before he or she leaves. [Help topic 1295 \[pg:0343\]](#) shows how to send a custom text message from your account.

Here is an example of what a volunteer would receive if you sent a message asking her to stop by your office while she is working:



Cell phone service providers require us to include identification and certain instructions with each message sent. This extra text can take up to 50 of the 160 characters available for text messaging so only 110 characters are available for custom messages. Some carriers outside of the United States limit text messages to less than 160 characters. Recipients using these providers may not receive the entire message even if it is 110 characters or less.

If your text message field exceeds the maximum character length allowed, the message will be sent by email (when available) and the recipient will receive a text like the one below alerting them that an email has been sent. **Please note:** Because text messages are delivered much faster than email messages, the recipient may not see the email if they look for it right after receiving the text alert.



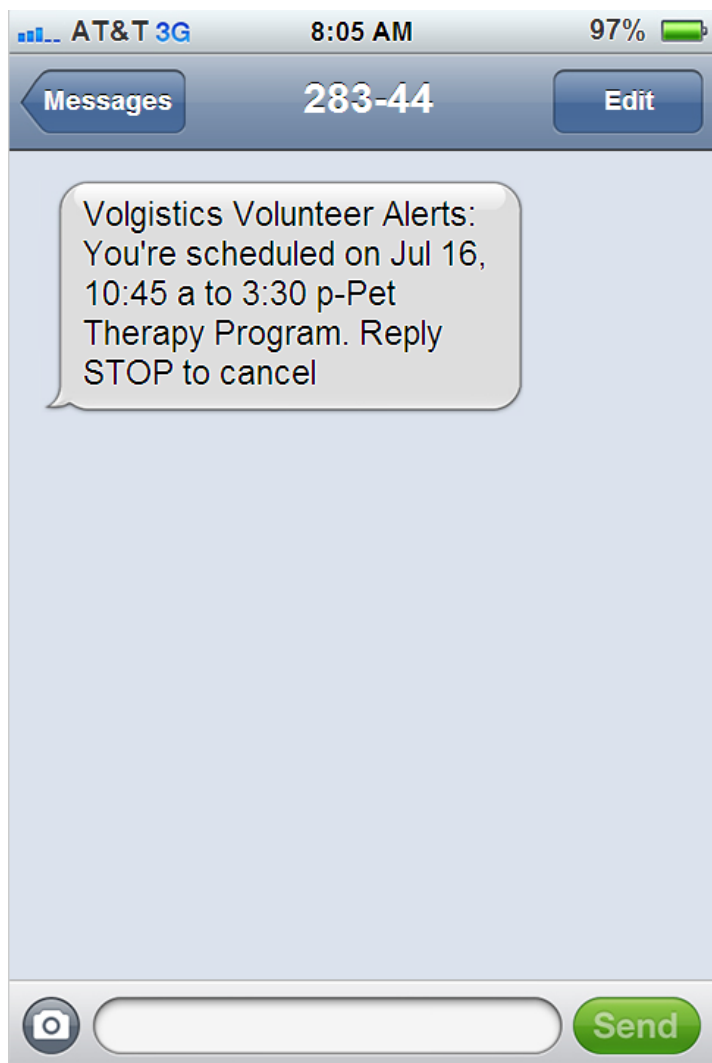
## **Types of Automatic Text Messages**

Your volunteers and [Coordinators \[pg:0163\]](#) can also receive automatic messages. Depending on your account's settings, and who has opted-in, the following automatic text messages can be sent from your account:

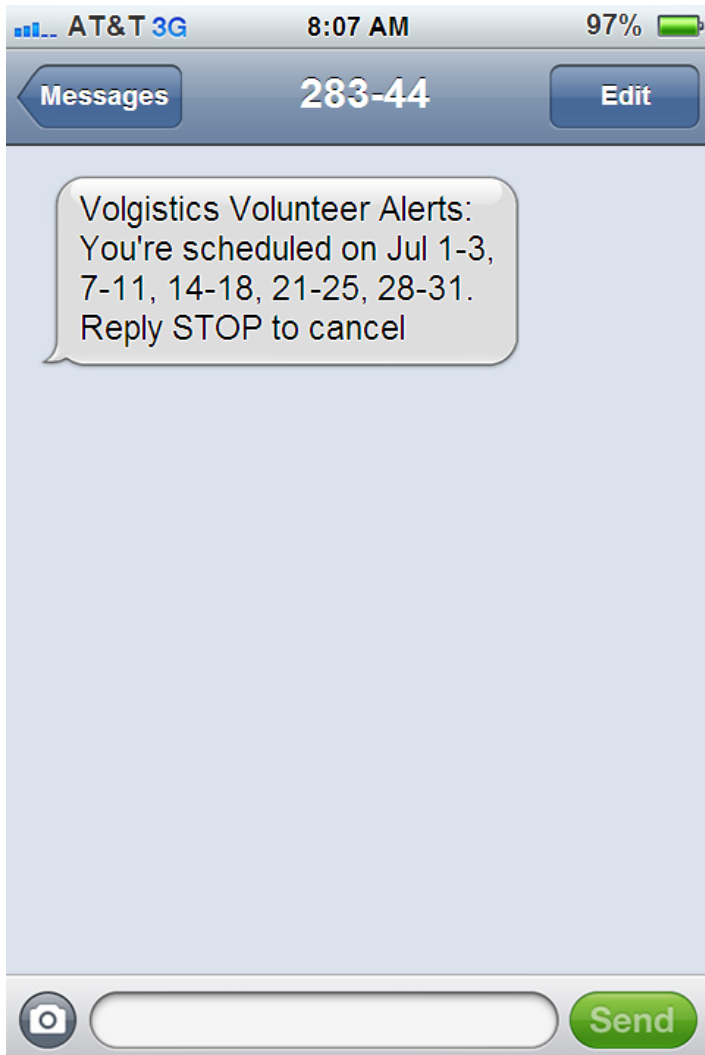
- [Daily \[pg:1402\]](#) and/or [monthly \[pg:1399\]](#) schedule reminder messages for volunteers.
- [Daily \[pg:1403\]](#) and/or [monthly \[pg:1400\]](#) schedule reminder messages for [Coordinators \[pg:0163\]](#).
- [On-demand schedule reminders \[pg:1396\]](#) for volunteers.
- Schedule reminder messages to [tagged \[pg:1529\]](#) volunteers sent from the [Tags menu \[\\_\\_\\_\\_\\_\]](#).
- Monthly volunteer schedules [initiated by the volunteer \[pg:1595\]](#) from the Schedule page in [VicTouch \[pg:1778\]](#).
- Reminders to volunteers that a periodic or annual [Checklist item \[pg:0142\]](#) will need to be renewed soon.
- Password messages to volunteers and Coordinators. These can be sent if the user clicks the [Forget your password? \[pg:1975\]](#) link, a [System Operator \[pg:0065\]](#) sends the password message from the [Vic tab of the record \[pg:1717\]](#), or a System Operator sends the password message by [tagging the volunteer records \[pg:2013\]](#).
- [Self-scheduling alerts \[\\_\\_\\_\\_\\_\]](#) to Coordinators that a volunteer added or removed him or herself from the schedule.
- [Application received alerts \[\\_\\_\\_\\_\\_\]](#) for [System Operators \[pg:0065\]](#) that an [online application form \[pg:0413\]](#) was submitted.

## Content for Automatic Text Messages

Text messages have a limited number of characters available, and cell phone service providers require us to include identification and certain instructions with each message sent so there are only 110 characters available for the message content. Because of this, the content of the automatic messages is determined by the system. There is not a way to customize the content for automatic messages. In most cases, the important information from the automatic message can be communicated without any problem using the limited number of characters. For example, in the daily schedule reminder shown below, the volunteer receives the date, times, and assignment he or she is serving in. Here is how this would look for a volunteer scheduled from 10:45 am to 3:30 pm on July 16 in an assignment called *Pet Therapy Program*:



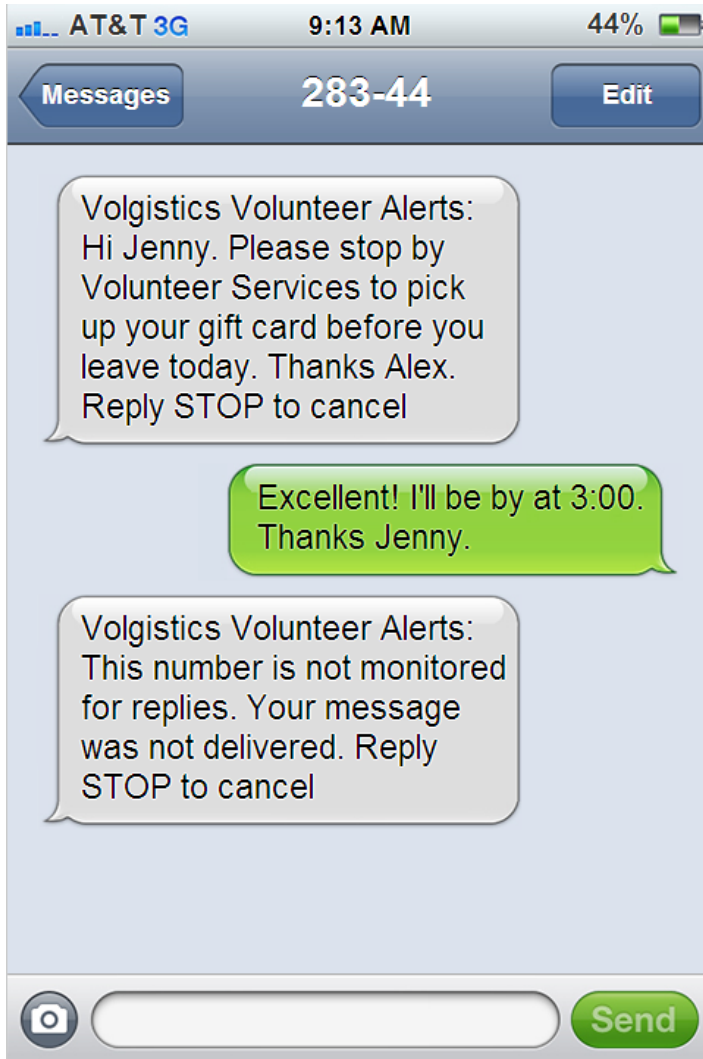
In other cases there is not a way to communicate all the information so if the recipient needs to know more, he or she will need to sign-in to see the additional information in [VicNet \[pg:1724\]](#). For example, the monthly schedule reminders do not have room to include the times and assignments the recipient is scheduled in because they contain a whole month's worth of information. Here is how the monthly schedule reminder message would appear for July 2014 for a volunteer scheduled on Monday through Friday:



### **Outgoing Messages Only**

Text messages sent from Volgistics are forwarded to an SMS gateway to be delivered to the recipient's phone. This process does not provide a way to link the response back to the Volgistics account that it originated from. Because of this, there is not a way for volunteers and Coordinators to respond directly to a text sent to them. So if you want the recipients to reply, you should arrange this beforehand, or include directions in your text.

If a volunteer or Coordinator does respond to a text you send, they will receive a message back that their message was not delivered. Here is how this would look if the volunteer who received the text message from the example in the Custom Text Messages section above sent a reply:



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## Getting Started with Text Messaging

Help topic 1301

Added or revised 12-01-2015

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*Volgistics is pleased to offer text messaging as a feature to help you communicate with your volunteers and Coordinators [pg:0163]. This help topic is designed to help you get started with using the text message feature in your account.*

You can click on a link in the *Content* box below to be taken directly to a section of the help topic.

### Contents

1. Requirements & Background Information
2. Enable Text Messaging for Your Account
3. Communicate that Text Messaging is Available
4. Send Text Messages to Volunteers & Coordinators
5. Opt-in as a System Operator
6. How Text Messaging Changes Your Account

## **1. Requirements & Background Information**

Before you begin using the text message feature, please read the following information regarding account requirements and background information:

- VicNet Required.
  - There is not a charge for the text messaging feature. However, it does require accounts to include the [VicNet \[pg:1724\]](#) module in their [service level \[pg:0719\]](#). VicNet is necessary because it provides a way for volunteers and Coordinators to opt-in and out of text messaging, plus manage their text preferences. If VicNet is not currently part of your account's service level, you can add it by following the steps shown in [help topic 2007 \[pg:0050\]](#).
- Outgoing Messages Only. Your text messages will originate from the Volgistics system before being forwarded to an SMS gateway. This process does not provide a way for incoming messages to be received back at the account the original message was sent from. This means there will not be a way for volunteers and Coordinators who receive your messages to respond directly to them. However, you can include your phone number in your text message so volunteers can use it to respond back with a text. If volunteers or Coordinators respond to a message (with something other than a keyword such as *HELP*, *YES*, or *RESUME*), they will receive a reply that their text was not delivered.
- Limited Message Length. Cell phone service providers require us to include identifying information and other instructions with each message sent. This extra text can take up to 50 of the 160 characters available for text messaging so only 110 characters are available for custom messages. Some carriers outside of the United States limit text messages to less than 160 characters. Recipients using these providers may not receive the entire message you sent.

## **2. Enable Text Messaging for Your Account**

To get started with text messaging, an [Administrator \[pg:0052\]](#) for your account will need to enable text messaging. You can find directions on how to do this in [help topic 1290 \[pg:0321\]](#).

## **3. Communicate that Text Messaging is Available**

You could introduce text messaging to volunteers and Coordinators at orientations and trainings. But to get started initially, most likely sending an email message from your Volgistics account is the easiest way to let everyone know that text messaging is available. To make this easier, Volgistics comes with a built-in way to send an email message.

After text messaging is enabled, the [Messages Ground Rules \[pg:1930\]](#) page will have a section at the bottom where a default message appears. The default message reads:

Hello,

We are now able to send text messages! This will allow us to communicate with you faster, while offering you a more convenient way to receive messages. This option will allow us to send custom messages to keep you up-to-date, and you can also receive automated messages such as schedule reminders by text.

Text messages you receive from us will appear as "Volgistics Volunteer Alerts." You will not be able to respond to the text messages so if you need to reply please contact the volunteer office by email or phone.

To begin receiving text messages, you will need to opt-in with your mobile phone number. Your normal text and data rates will apply so please take this into consideration. Please click the following link to learn how to opt-in to text messaging. If the URL does not appear as a clickable link, please copy and paste the address into your web browser.

<https://www.volgstics.com/ex/Help.dll?ACT=21&HID+&TOPIC=1291>

Thank you for opting-in to text messaging. We appreciate your service and look forward to communicating with you more efficiently.

Thank you,

Volunteer Services

To edit this message, or send the message to all Coordinators, select [Setup \[pg:0887\]](#) from the menu, expand the *Messages* link, and then select *Ground rules*. Scroll down to the *Text Message Opt-in Email* section.

If you edit the message's content or subject line, be sure to click the **Save** button before you send the message. To send the message to all of your Coordinators, click the **Send to all coordinators** button at the bottom of the page. If the Coordinator has already opted-in to text messaging, the email will not be sent to them.

In order to send the message to volunteers, you need to [tag the records \[pg:1538\]](#) that you want to receive the email. Then select

*Tags*

from the menu and press the

**Go**

button beside the option to send the opt-in message. Volunteers who have already opted-in to text messaging will not receive the email even if they are in the group of records you tagged. You can learn more about sending the email to tagged records in the [Send the text messaging opt-in email to the tagged records \[ \]](#) section of help topic 2137.

#### **4. Send Text Messages to Volunteers & Coordinators**

After your account has text messaging enabled, and volunteers and [Coordinators \[pg:0163\]](#) have opted-in, you can begin sending text messages. It is not necessary for a [System Operator \[pg:0065\]](#) to opt-in to text messaging to send messages to volunteers and Coordinators. Any operator who has [operator rights to send messages \[ \]](#) can send text messages.

Sending a custom text message to your volunteers and Coordinators is very similar to sending an email message. To start the process, select *Mailbox* from the menu, click on the [Out Box tab \[pg:1978\]](#), and click the **Send a message** button to start your message. You can find in-depth directions on sending text messages in [help topic 1295 \[pg:0343\]](#). You may also find [help topic 1299 \[pg:0347\]](#) useful because it shows hints on how to send email and text messages based on the volunteer's preferences.

Automatic messages from the system will be sent by text to volunteers and Coordinators as long as they opt-in to text messaging and select to have that type of message sent by text. You do not need to do anything else to enable this as long as the automatic messages are already setup in your account. The content and wording of the automatic text messages is standardized to make sure the message meets the character requirements for text messages. You can find a list of the different kinds of automatic text messages that can be sent in the *Types of Automatic Text Messages* section of [help topic 1300 \[ \]](#).



## 5. Opt-in as a System Operator

Currently the only text messages [System Operators \[pg:0065\]](#) can receive if they opt-in to texting are alerts that an [online application form \[pg:0413\]](#) has been submitted. If you would like to receive these alerts by text message, you will need to opt-in as shown in [help topic 1293 \[pg:0334\]](#).

If you are a System Operator and you'd like to receive alerts when volunteers add or remove themselves from the schedule, you can do this by setting up a [Coordinator record \[pg:0163\]](#) in the account in addition to your System Operator record. Your account's [service fee \[pg:0710\]](#) is not based on the number of Coordinator records so you do not need to worry about this increasing your expenses.

You can find directions on how to do this in the *Receive Self-Scheduling Alerts* section of [help topic 1293 \[pg:0334\]](#). There is not a need to opt-in as a System Operator if you only want to receive the self-scheduling alerts.

## 6. How Text Messaging Changes Your Account

Once you have text messaging setup in your account, you will see some changes.

The first thing you may notice is that there are new fields on the [Core tab \[pg:1868\]](#) of volunteer records and on the Coordinator tab of [Coordinator \[pg:0163\]](#) records:

The screenshot shows a web interface for a volunteer record. At the top, there are tabs: Core, Profile, Service, Schedule, History, Contacts, Notes, and Vic. Below the tabs are buttons: Save, Cancel, Archive, Delete, Combine, New, Previous, and Next. There is a checkbox for 'Tagged' and a 'Copy' icon. The form is divided into sections: Name, Address, and Contact Information. The Name section includes fields for Last name (Tutone), First name (Jennifer), Middle name, Title (Ms.), Nickname (Jenny), Number (1981), Status (Active), Type (Adult Volunteer), and Kind (Individual). The Address section includes fields for Street 1 (100 Billboard Way), Street 2 (Apt. #4), Street 3, City (Cincinnati), State (OH), and Zip (45220). There are checkboxes for 'No postal mail' and 'No email'. The Contact Information section includes fields for Home, Work, Cell, Text, Fax, Pager, and Other, each with a 'Ok to call' checkbox. Red arrows point to the 'Text' field and the 'Messaging' section.

After you enable text messaging, a

Text

field will appear where the other phone numbers show on volunteer records. This field is "read only" because regulations do not allow you to change a volunteer's or Coordinator's number as it affects their opt-in rights. If a volunteer or Coordinator needs to change the number they use for texting, they will need to opt-out of texting at the old number and then opt-in with the new number. The *If Your Phone Number Changes* section of [help topic](#)

1291 [ ] shows how to do this.

To the right of the

*Text*

field you will find a

*Text Validity*




field. This field is helpful to determine if the volunteer's text number is receiving messages because the field's color will change based on the number's validity. [Help topic 1292 \[pg:0333\]](#) has more information on this.

There is also a *No text message* checkbox that can be used to block a volunteer or Coordinator from receiving text messages without requiring them to opt-out of texting. One use for this would be a situation where a volunteer is asked to leave your organization so you do not want him or her to receive texts, but you still need to keep his or her record for reports.

You will also see a new column in the Messages box on the History tab of the volunteer records. This column will show which text messages the volunteer has received and whether or not they were successfully received. [Help topic 2064 \[pg:0370\]](#) explains more about how this works.

**Messages**

Recent Archived

Sent	Subject	Sent to			
07-14-2014	Marincy, Arizona	(555) 867-5309			
07-14-2014	Happy Birthday, Anyway	(555) 867-5309			
06-09-2014	.lennv .lennv	tommv tutone 2@mailinator.com			

You may also want to add the

*Text*

and



*Text message validity icon*

fields to the Volunteers page so you can see who has opted in. Remember that you can sort the Volunteers page by any of the column headings (except *Tag*) by clicking on the column's title. This makes it easy if you want to [Tag \[pg:1538\]](#) volunteer records to send them a text message. You can just sort the page by the *Text* column and then tag the records. You can find information on how to change which fields appear on the Volunteers page in [help topic 1202 \[pg:1381\]](#).

## 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](#)

1 Volunteer listed

	Name	Tag	Number	Text	
	<a href="#">Tutone, Jennifer</a>	<input checked="" type="checkbox"/>	1981	(555) 867-5309	

1 Volunteer listed

There are also two new [Set \[pg:0858\]](#) rules to help you find volunteers who have opted-in, or volunteers based on their text number validity. [Help topic 1297 \[pg:0837\]](#) explains more about the [Set rule \[pg:0853\]](#) for finding volunteers who have, or do not have, a text number. [Help topic 1298 \[pg:0840\]](#) explains more about the rule for finding volunteers who have, or do not have, a valid text number. [Help topic 1296 \[pg:0837\]](#) shows how to use this Set rule to find volunteers with an invalid text number.

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## Mailbox Out Box Tab

Help topic 1991

Added or revised 04-28-2014

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The Mailbox's Out Box tab provides a way to send messages to your volunteers and [Coordinators \[pg:0163\]](#). It is also used to view and manage your history of sent messages. If you are not already on the Out Box tab, you can get there by selecting Mailbox from the [menu \[pg:0215\]](#), and then clicking the Out Box tab.

The Out Box tab is divided into three sub-tabs for organizing your messages. These are the Recent, Archived and Deleted sub-tabs.

Sent	Subject	From	To	Count
<input type="checkbox"/> Saved to send later	<a href="#">Updated Parking Pass Needed</a>	Brenda Samuelson	All Active volunteers	0
<input type="checkbox"/> 09-27-2013 11:45	<a href="#">Orientation Scheduled</a>	Brenda	All tagged	17

This help topic covers how the Out Box tab works in your Volgistics account.

### Contents

[Refreshing the Out Box Tab](#)

[Sending Messages from the Out Box Tab](#)

[Site Level Access and the Out Box Tab](#)

[Sorting the Out Box Tab](#)

[Recent Sub-Tab](#)

[Archived Sub-Tab](#)

[Deleted Sub-Tab](#)

[Viewing Stored Messages](#)

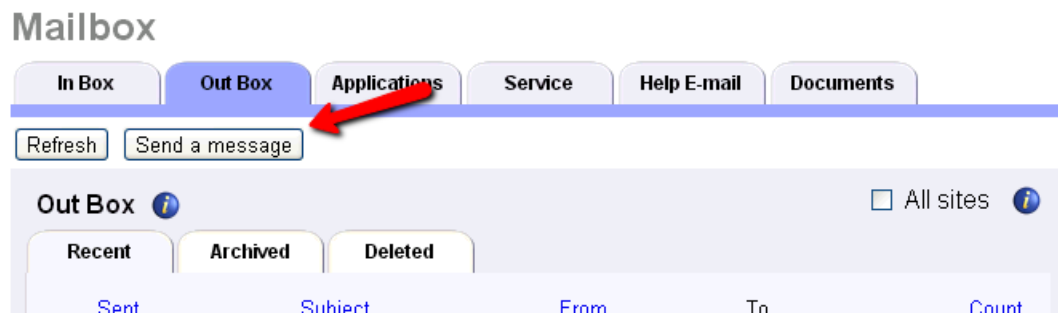
[Recipient List on Stored Messages](#)

### Refreshing the Out Box Tab

The Out Box tab will show an up-to-date view each time you select Mailbox on the Volgistics [menu \[pg:0215\]](#) and then return to the Out Box tab. If you're on the Out Box tab and you want to update the view without leaving the tab, click the **Refresh** button in the top left corner of the Out Box tab.

## Sending Messages from the Out Box Tab

You can send Vic Mail, email messages and text messages to your volunteers and [Coordinators \[pg:0163\]](#) from the Out Box tab. To start a message, click the **Send a message** button at the top of the tab.



Refer to the following help topics for details on sending each type of message:

- Email Messages- [Help topic 2195 \[pg:0404\]](#)
- Text Messages - [Help topic 1295 \[pg:0343\]](#)
- Vic Mail Messages - [Help topic 1127 \[pg:0315\]](#)

## Site Level Access and the Out Box Tab

If your organization uses [Site Level Access \[pg:0092\]](#) and a [System Operator \[pg:0065\]](#) is logged in as a Headquarters-level operator, the Out Box tab will have a checkbox for


### *All Sites*

in the upper right corner. If this box is checked, the operator will view messages generated by Headquarters as well as messages generated by [Site-level Operators \[pg:1442\]](#). If the *All Sites* box is un-checked, only messages generated by Headquarters will be displayed on a Headquarters-level operator's Out Box tab.

Users logged in as Site-level Operators will not see the *All Sites* checkbox on the Out Box tab. With Site Level Access, the Out Box tab will only display messages generated at their Site.

## Sorting the Out Box Tab

By default, all of the sub-tabs are sorted by the Sent column with the most recent items at the top. In the case of the Recent and Deleted sub-tabs, *Saved to send later* messages appear above sent messages. As your Out Box tab grows to contain more messages, it may become difficult to find an item you're looking for. To help you with this, Volgistics allows you to sort the sub-tabs by the Sent, Subject, From and Count columns. Just click on the column heading to sort the messages on the sub-tab based on that column's information.

Out Box 

Recent		Archived	Deleted	
<a href="#">Sent</a>	<a href="#">Subject</a>	<a href="#">From</a>	To	<a href="#">Count</a>
<input type="checkbox"/>	Saved to send later	<a href="#">Additional Volunteers Needed</a>	Brenda Samuelson	0
<input type="checkbox"/>	10-09-2013 3:22 p	<a href="#">Construction Entrance</a>	Brenda	All Active 15

## Recent Sub-Tab

The Recent sub-tab shows messages that were *Saved to send later* when they were created, along with sent messages that are less than 180 days old. If a sent message remains on the Recent sub-tab after 180 days, it is automatically sent to the Archived sub-tab. *Saved to send later* messages cannot be moved to the Archived sub-tab.

If a volunteer was the recipient of a message that was sent, the subject and date of the message on the Recent sub-tab will also appear in the message history kept on the Recent sub-tab in the Messages section of the volunteer's History tab. You can find more information on this in [help topic 2064 \[pg:0370\]](#).

Sent messages can be moved from the Recent sub-tab to the Archived sub-tab by checking the box next to the message and then clicking the **Archive** button. You can check all of the boxes by messages at once by clicking the **Check all** button. Clicking the **Un-check all** button reverses this action. If *Saved to send later* messages are included when you click the **Archive** button, you will get a message that these messages cannot be moved to the Archived sub-tab.

Sent messages and *Saved to send later* messages can be moved from the Recent sub-tab to the Deleted sub-tab by checking the box next to the message and then clicking the **Delete** button. You can check all of the boxes by messages at once by clicking the **Check all** button. Clicking the **Un-check all** button reverses this action.

Please see the Viewing Stored Messages section of this help topic for information on viewing a stored message.

## Archived Sub-Tab

The Archived sub-tab shows messages that have been manually archived as well as sent messages that were automatically moved to the Archived sub-tab from the Recent sub-tab after 180 days have passed. Messages in this section will remain indefinitely unless they are deleted. There is not a way to send a message from the Archived sub-tab back to the Recent sub-tab because there are not any actions that can be taken on the Recent sub-tab that cannot also be taken from the Archived sub-tab.

If a volunteer was the recipient of a message stored on the Archived sub-tab, the subject and date of the message will appear on the Archived sub-tab in the Messages section of the volunteer's History tab. You can find more information on this in [help topic 2064 \[pg:0370\]](#).

The messages on the Archived sub-tab can be moved from the Archived sub-tab to the Deleted sub-tab by checking the box next to the message and then clicking the **Delete** button. You can check all of the boxes by messages at once by clicking the **Check all** button. Clicking the **Un-check all** button reverses this action.

Please see the Viewing Stored Messages section of this help topic for information on viewing a stored message.

## Deleted Sub-Tab

The Deleted sub-tab shows messages that have been deleted from the Recent or Archived sub-tabs. Messages sent to this tab remain for seven (7) days after they are deleted to allow you to recover them if they were accidentally deleted. If they are not recovered within seven days, they are permanently deleted from the system.

If a volunteer was the recipient of a message that appears on the Deleted sub-tab, the subject and date of the message will continue to appear in the message history in the Messages section of the volunteer's History tab until it is permanently deleted from the system. Once the message is permanently deleted, the subject and date will be removed from the volunteer's message history. If you complete the action to permanently delete the message yourself, you may see the subject and date for a brief time still on the volunteer's record. This is because the process to remove the date and time from the volunteer's record is performed during the overnight maintenance cycle. You can find more information on this in [help topic 2064 \[pg:0370\]](#).

The messages on the Deleted sub-tab can be restored to the tab they were received from by checking the box next to the message and then clicking the **Restore** button. You can check all of the boxes by messages at once by clicking the **Check all** button. Clicking the **Un-check all** button reverses this action.

The messages on the Deleted sub-tab can be permanently deleted before the seven (7) day waiting period by checking the box next to the message and then clicking the **Delete** button. You can check all of the boxes by messages at once by clicking the **Check all** button. Clicking the **Un-check all** button reverses this action. Once a record is permanently deleted, there is not a way to recover it.

Please see the Viewing Stored Messages section of this help topic for information on viewing a stored message.

## Viewing Stored Messages

To see details about any message on a sub-tab, just click on the subject of the message. When you do this you can view information such as how the message was sent, the volunteers it was sent to and the content of the message. The message's content box will vary in appearance depending on the web browser you use. For example, some browsers do not allow you to scroll to see all of the information in the content box. With most browsers you can highlight and copy the message's content even if it appears to be grayed out.

The controls available on the message differ depending on which sub-tab you're on. The Recent sub-tab has **Archive** and **Delete** buttons, the Archived sub-tab only has a **Delete** button, and the Deleted sub-tab has **Restore** and **Delete** buttons on sent messages. *Saved to send later* messages on the Deleted sub-tab will have the same options available as they do on the Recent sub-tab. If you send a *Saved to send later* from the Deleted sub-tab, it will automatically be moved to the Recent sub-tab.

## Recipient List on Stored Messages

When you view a sent messages as shown in the Viewing Stored Messages section of this help topic, you will see a list of volunteers and [Coordinators \[pg:0163\]](#) who the message was sent to. On the Archived sub-tab, this list is collapsed initially so you need to click the **Show recipients** button to see this list. When a message was sent to both volunteers and Coordinators, the volunteer names will appear first and then the Coordinator names will be listed at the end.

In order to be on the recipient list, the volunteer's record needs to be in the [non-archived \[pg:0709\]](#) section of your database. Records that have been [deleted \[pg:2016\]](#), or [archived \[pg:1819\]](#), will no longer appear on the recipient list.

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# Make Sure Volunteers & Coordinators Receive Your Email

Help topic 2046

Added or revised 06-15-2016

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Many email systems and networks are setup to use email filtering systems to reduce the amount of unwanted email (SPAM) they receive. In some cases, these email filtering tools also prevent legitimate mail from reaching the recipient. There are three areas that impact delivering email messages: 1) The volunteer or Coordinator's own settings in their email account, 2) The settings inside of your Volgistics account, and 3) The settings on your network that are put in place by your service provider or IT department. This help topic explains some of the strategies that can be used in each of these areas to help insure that your messages are received.

You can click on a link in the Contents box to go directly to a section of the help topic.

## Contents

### Volunteer and Coordinator Settings

Encourage "White-listing"

### Volgistics Account Settings

Use Sender ID

Change From Address

### Network or Provider Settings

Email Addresses with Your Organization's Domain

Adding IP Addresses for Volgistics' Email Servers

## **Volunteers and Coordinators**

Volunteers and [Coordinators \[pg:0163\]](#) may need to make changes inside of their email accounts in order to receive email messages sent by you. Primarily this is making sure Volgistics, and the email addresses you use as [reply-to addresses \[pg:0398\]](#), are on their safe-sender or "white-list."

## **Encourage "White-listing"**

When you send email through Volgistics, volunteers and Coordinators may see your messages as coming from you, with your own email address as the [reply-to address \[pg:0398\]](#). Or, depending on your account settings, they may see the messages as coming from "volgistics.com" with your own email address as the reply-to address. Volunteers and Coordinators can be sure their SPAM filters will not block the messages you send them through Volgistics by adding "volgistics.com" to their safe sender list or "white-list." The steps for doing this vary from one email system to another, and must be performed by the volunteer or Coordinator because it will involve accessing the settings in their email account.

If you'd like, you can provide your volunteers or Coordinators with instructions on how to do this. The following sample text can serve as the basis for your instructions. If you email often, consider adding these instructions – or something similar – to a web page volunteers and Coordinators see (such as the [VicNet Home tab \[pg:1486\]](#)). Other strategies to get the information to the recipients is to put it in a volunteer newsletter, or you could add it to a welcome message you send to new volunteers.

## **Sample "safe sender" message for volunteers and Coordinators**

### **Be sure you always receive our email!**

Many people use email filtering tools to reduce the amount of unwanted SPAM they receive. In some cases, these email filtering tools can also block legitimate mail from reaching you. If your email system uses SPAM filters, you can prevent these filters from blocking our email messages by adding our mail system's email addresses to your safe sender list or white list.

To add us to your safe list, follow the instructions for your email provider:

America Online: If you have AOL 9.0 Enhanced, go to keyword "address book" and put [mailer@volgistics.com](mailto:mailer@volgistics.com) and [volunteermail@volgistics.com](mailto:volunteermail@volgistics.com) in email address fields in your address book.

MSN Hotmail: Select "Options" and then "Junk Email Protection" and add [mailer@volgistics.com](mailto:mailer@volgistics.com) and [volunteermail@volgistics.com](mailto:volunteermail@volgistics.com) to your Safe List.

Yahoo Mail: Click the "Addresses" button, then select "Add Contact." Enter [mailer@volgistics.com](mailto:mailer@volgistics.com) and [volunteermail@volgistics.com](mailto:volunteermail@volgistics.com) to your contacts list.

Other ISPs: Some Internet Service Providers (ISP's) enable spam filters that you can turn off or update to your preferences. Check your ISP's website, or contact their technical support team, if you believe you are missing messages from us. Ask them to be sure messages sent by [mailer@volgistics.com](mailto:mailer@volgistics.com) and [volunteermail@volgistics.com](mailto:volunteermail@volgistics.com) are always accepted.

Microsoft Outlook: From the Outlook menu choose "Actions," then "Junk Email," and then "Junk Email Options." Select the "Safe Senders" tab and then click the "Add" button. Enter [mailer@volgistics.com](mailto:mailer@volgistics.com) and then click the "OK" button. Repeat these steps for [volunteermail@volgistics.com](mailto:volunteermail@volgistics.com).

Other Email Software: Check your email software options or settings screen to see if you can add [mailer@volgistics.com](mailto:mailer@volgistics.com) and [volunteermail@volgistics.com](mailto:volunteermail@volgistics.com) to a white list or safe list of senders that are never filtered.

To send us an email message, send your message to "(add your email address here)," or click "reply" on a message we've sent to you.

### **Volgistics Account Settings**

If your messages are not being delivered, there are two settings in your Volgistics account that may help. You can learn more about these in the sections below.

#### **Use Sender ID**

Sender ID is a method of sending email so that receiving email systems can verify that the sender of a message is who they say they are.

With Sender ID, the mail you send to volunteers and Coordinators through Volgistics can be verified more accurately by receiving mail systems, often bypassing spam filters and giving your email a better chance of arriving in each recipient's inbox. In addition, many ISP's like Hotmail will flag your email as "authenticated" when you use Sender ID, which improves the probability of your emails being opened by volunteers and Coordinators.

If you haven't already, you should check to be sure you are sending email through Volgistics using Sender ID. [Help Topic 1116 \[pg:0311\]](#) – Sender ID explains how to enable Sender ID.



## Change From Address

Your Volgistics account can be setup to send messages out using *VolunteerMail@volgistics.com* as the From email address, or the [reply-to \[pg:0398\]](#) address recorded for the message type as the From address. If your messages are not being received by your volunteers or Coordinators, it may help to switch to the

*VolunteerMail@volgistics.com*

option. This setting is on the Message Ground Rules page. You can learn more about this [here \[\\_\\_\\_\\_\\_\]](#).

## Network or Provider Settings

In many cases, the changes outlined in the sections above will be adequate to make sure your email messages get delivered. If you are still experiencing problems with email message delivery after implementing the changes, you may need to have your internet provider, or the IT team that oversees your organization's network, make changes. The following sections have more information on this.

### **Email Addresses with Your Organization's Domain**

Depending on your organization's network setup, volunteers and Coordinator records that have the same domain as your organization may have trouble receiving email messages. For example, if your organization's domain is "@volunteer.org" and a Coordinator has an email address that is "JBrown@volunteer.org," email sent through Volgistics may be blocked or sent to a spam or junk mail folder. In these cases, you (or your IT or IS department) may need to whitelist Volgistics as described above.

### **Adding IP Addresses for Volgistics' Email Servers**

There may also be cases where the IP addresses of the Volgistics email servers need to be listed in the security software for your organization's email service. This may be necessary so that email messages sent by you through Volgistics are allowed to pass through to the recipient. These IP addresses are:

69.87.157.214  
69.87.157.215  
69.87.157.216  
69.87.157.217

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## Including Email Attachments

Help topic 2062

Added or revised 10-28-2015

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You can optionally attach a [PDF file \[pg:0449\]](#) or a Microsoft Word document (DOC or DOCX) file to any email you send through Volgistics. To attach a PDF, DOC or DOCX file to an email message:

1. If you haven't already, upload the file you want to attach to your email message:
  - a. Choose Mailbox from the [menu \[pg:0215\]](#).
  - b. Click on the Documents tab.

- c. Click the **Browse** button in the Upload box, and then locate your PDF, DOC or DOCX file.
- d. Click the **Upload** button to start uploading the file. Once the upload is complete your document will be listed in the Documents box on the Documents tab.

You're now ready to send your email message.

2. Click on the Out box tab in the Volgistics Mailbox.
3. Click the **Send a message** button.
4. Under "Send this message by" check 'Email.'
5. Choose the volunteers and/or coordinators you want this message to go to.
6. Choose whether you want the message sent in 'Plain text' or 'HTML' format. [Help topic 1026 \[pg:0295\]](#) shows some advantages to sending messages in the HTML format.
7. Choose what type of email message you're sending. This field works with the [Email Preferences \[pg:0381\]](#) volunteers have selected to control which volunteers will actually receive the message. [Help topic 1023 \[pg:1321\]](#) shows how to change the options available in the drop down list.
8. Enter a subject for your email message.
9. Use the "Attachment" drop down list to choose the file you want to include as an attachment to your email message.
10. Enter your message in the Message box. If you're using the HTML format, you can find help in how to use the HTML Email Editor in [Help topic 1024 \[pg:0278\]](#). Use the **Preview** button in the HTML Editor (shown below) to see how your message will look before you send it.



11. If you're sending the message in HTML format, click the **Insert text** button to transfer the content into the "Text version" field. This is important because not all recipients will be able to receive the message with the HTML formatting. For example, recipients who receive the message on some smart phones, or in an email program that does not support HTML format or has HTML formatting turned off, will need a text version of the message so they can read it. You should also edit the text version of the message. Since transferring the message from HTML to plain text may remove returns or other formatting (such as the numbers in front of numbered lists), you will need to edit the plain text version of the message so it appears correctly.
12. Click the **Send now** button to send the message immediately. Or if you're not finished with the message, or want to send it at a later date, click the **Save to send later** button.

Unless you know your volunteer or coordinator email recipients will be able to open Microsoft Word documents, choosing to send email attachments as PDF files rather than DOC or DOCX files will generally result in more recipients being able to open and view the attachment. PDF files may be opened with [Adobe Reader which is freely available \[pg:0449\]](#) and pre-installed on most computers. You can use PDF files to send a variety of different kinds of documents as attachments. For example, PDF files may contain volunteer newsletters, forms, announcements, letters, and more.

PDF files [pg:0449] and Microsoft Word DOC or DOCX files are the three kinds of files that can be included as attachments to email you send through Volgistics.

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## Tracking messages you have sent

Help topic 2064

Added or revised 10-05-2016

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Volgistics includes tools that make communicating with your volunteers easy. You can send volunteers messages via [email \[pg:0404\]](#), [Vic mail \[pg:0315\]](#), or [text \[pg:0343\]](#). Volunteers can also receive automated email or text messages such as [schedule reminders \[pg:0791\]](#) and reminders for [Checklist \[pg:0142\]](#) items that need to be renewed.

To send Vic mail messages, your account's [service level \[pg:0719\]](#) must include either the [VicNet \[pg:1724\]](#) or [VicTouch \[pg:1778\]](#) modules. To send text messages, your account must have [text messaging enabled \[pg:0321\]](#).

Each time you send a message to a volunteer – and each time Volgistics sends a message to a volunteer automatically – Volgistics adds a record of the message to the volunteer's History tab. These appear in the Messages box on the History tab for each volunteer, as illustrated here:

Sent	Subject	Sent to			
08-04-2014	Updated Waiver Needed	(555) 867-5309			
07-29-2014	New Schedule Posted	tommy.tutone.2@mailinator.com (555) 867-5309			
07-24-2014	New Phone List Attached	tommy.tutone.2@mailinator.com			
07-07-2014	Availability Update Neede	tommy.tutone.2@mailinator.com (555) 867-5309			
06-25-2014	Additional Sign-in Instructions	tommy.tutone.2@mailinator			

This help topic explains more about how the Messages box works. You can click on a link in the *Contents* box to go directly to a section of the help topic.

### Contents

Recent and Archived Sub-Tabs

Message Box Columns

Email Message Not Sent

Text Message Not Sent

Reasons for Email Delivery Failures

How soon will an email message failure be reported?

Reasons for Text Messages Not Being Delivered

Email Address and Text Number Validity

## Recent and Archived Sub-Tabs

The Messages box is divided into two sub-tabs: Recent and Archived. These correspond with the Recent and Archived sub-tabs on the [Out Box tab \[pg:0362\]](#) of your Volgistics Mailbox. So if a message is listed on the Recent sub-tab of your Out Box, it will appear on the Recent sub-tab on the volunteer's record, and if a message is listed on the Archived sub-tab of your Out Box, it will appear on the Archived sub-tab on the volunteer's record. If you manually delete a message from the Out Box tab, it will still appear on the volunteer's record until the overnight maintenance cycle runs. After the maintenance cycle runs, it will no longer appear.

Automatic email messages do not appear on the Out Box tab of the Volgistics mailbox. These messages are moved from the Recent sub-tab to the Archived sub-tab 180 days after they are sent. Schedule Reminder messages are deleted from the Archived sub-tab after a year, but Checklist reminder messages are kept indefinitely.

## Message Box Columns

The Messages box is divided into six (6) columns: *Sent*, *Subject*, *Sent to*, *Vic Mail*, *Email*, and *Text (SMS)*.

### Sent Column

The *Sent* column records the date the message was sent to the volunteer.

### Subject Column

The

#### *Subject*

column records the subject of the message that was sent. You cannot view the content of a message from the History tab, but you can view the original message's content on the Out Box tab of your Volgistics Mailbox. This applies as long as the message was sent by a [System Operator \[pg:0065\]](#)--automatic messages do not appear on the Out Box tab. The *Viewing Stored Messages* section of [help topic 1991 \[ \]](#) shows how to view the content of a message.

### Sent to Column

The

#### *Sent to*

column shows the email address and/or the text number the message was sent to. If a message was only sent by [Vic Mail \[pg:0315\]](#), this will column be blank.

### Vic Mail Column

The *Vic Mail* column is identified with the following icon in the heading:



Initially, this column will show the icon below that means the volunteer has not viewed the message yet:



Placing your cursor over the icon will cause a "Not yet viewed" message to appear. After the volunteer has viewed the message, the icon will change to the one shown below:



Placing your cursor over the icon will cause a message to appear stating "Viewed . . ." along with the date the volunteer viewed the message.

### Email Column

The *Email* column is identified with the following icon in the heading:



If a volunteer has opted-out of certain [types of email \[pg:1321\]](#) messages, from all email messages altogether, or the *No Email* checkbox is marked on the [Core tab \[pg:1868\]](#) of their record, the system will note that you attempted to send the volunteer a message with the following icon:



Placing your cursor over the icon will cause an "Opted-out" message to appear. You can see if the volunteer opted-out of certain email messages by looking at the [Email Preferences \[pg:0381\]](#) box on the Profile tab of their record. If a volunteer opted-out of all email altogether, or the *No Email* checkbox is marked on the [Core tab \[pg:1868\]](#) of their record, this will be noted as shown in the Email Message Not Sent section of this help topic.

As long as one of the opted-out scenarios listed above does not apply, messages sent by email will initially be shown with the green icon that appears below:



Placing your cursor over the icon will cause a "No failure reported" message to appear. **Please note:** the icon will show green by default for all of the message's recipients who did not opt-out of the message. Message failures are only noted when Volgistics receives a notice back from the recipient's email provider. The length of time this takes to occur depends on factors outside Volgistics' control. Please see the How soon will a message failure be reported? box later in this help topic for more information.

In cases where Volgistics receives a "bounced" or un-deliverable message, the message is marked with a red icon like the one shown below:



Placing your cursor over the icon will cause a message to appear noting the reason for the failure. You can find more information on these in the Reasons for Email Delivery Failures section of this help topic.

#### Text (SMS) Column

The *Text (SMS)* column is identified with the following icon in the heading:



If a message is sent by text to a volunteer, but there is a reason that prevents the message from being sent by text to the volunteer, the following icon will show:



When you place your cursor over the icon, a message will appear explaining more about why the text message was not able to be sent to the volunteer. Please see the Text Message Not Sent section later in this help topic for more information.

In cases where a volunteer is opted-in to text messaging, but a message sent via text cannot be delivered successfully, the message is marked with a red icon like the one shown below:



Placing your cursor over the icon will cause a message to appear noting the reason for the failure. You can find more information on these in the Reasons for Text Messages Not Being Delivered section of this help topic.

## Email Message Not Sent


There are four basic reasons the system will not send an email message to a volunteer. These are:




- The volunteer has opted-out of certain [types of email \[pg:1321\]](#) messages
- The volunteer has opted-out of all email messages from your organization
- The *No Email* checkbox is marked on the [Core tab \[pg:1868\]](#) of the volunteer record
- The volunteer's email address is invalid

If the first reason listed applies, you can look at the [Email Preferences \[pg:0381\]](#) box on the Profile tab of the volunteer's record for more information. If any of the bottom three reasons apply, the reason will be noted at the top of the Messages box on the History tab of the volunteer's record as shown below:

### Messages


**Recent**      **Archived**

 The email address for this volunteer is invalid

Sent	Subject	Sent to		
10-02-2013	Schedule reminder	s.binkman@blahoo.com		
				

The Email Preferences box on the Profile tab of the volunteer's record will also appear similar to the example shown below:

### Email Preferences

 The 'No-email' checkbox is checked for this volunteer

<input checked="" type="checkbox"/> Schedule reminders	<input checked="" type="checkbox"/> Checklist reminders
<input checked="" type="checkbox"/> Electronic newsletters	<input checked="" type="checkbox"/> Recruitment appeals
<input checked="" type="checkbox"/> Schedule Reminders	<input checked="" type="checkbox"/> Assignment Appeals

## Text Message Not Sent

When text messages are not sent, the system will note that an attempt to send the message by text was made. This will show in the Text column with the icon below:



If you place your cursor over the icon, a message will appear with more information about why the message could not be sent via text. More information on each of these messages follows:

#### 'No text message' is checked on the Core tab

This will appear if the *No text message* box is checked on the [Core tab \[pg:1868\]](#) of the volunteer's record. If you un-check this box, the volunteer will be able to receive text messages as long as none of the other restrictions below applies.

#### Opted-out of this Message Type

This message appears if the volunteer has chosen not to receive the [Message Type \[pg:1321\]](#) that was sent by text. Message Types are part of the built-in [Message Preference \[pg:0381\]](#) feature required to assure the integrity of mass messages.

#### Phone number is blocked for text messages; send 'RESUME'

This means the volunteer has texted STOP in reply to a message from your organization. This is used to show that the volunteer does not wish to receive any more texts from your organization. The volunteer will either need to text RESUME, or [opt-in to texting \[pg:0323\]](#) again.

#### Volunteer is not opted in to text messaging

This means the volunteer has not completed the [opt-in process \[pg:0323\]](#) so they can receive text messages. In order to receive texts, the volunteer will need to opt-in to texting so messages can be sent to their mobile (cell) phone number.

### **Reasons for Email Delivery Failures**

These are the reasons an email message could fail:

#### Domain not found

This message could be caused by the recipient's email system not being found on the Internet, which could be due to the following reasons:

- The recipient's mail system may have been out of service or incorrectly configured. Volgistics attempted to deliver the message periodically over a twenty-four hour period and received this failure notice each time.
- The part of the email address on the right side of the "@" sign may be invalid.
- The email address may be misspelled in the recipient's record.

#### Not deliverable

This message could be caused if the recipient's email system was found and it answered, however it reported that there is no such email address or the recipient's mailbox is unavailable. This could be due to the following reasons:

- The recipient's mailbox being over quota (i.e. too full).
- The part of the email address on the left side of the "@" sign may be invalid.
- The email address may be misspelled in the recipient's record.
- The recipient may no longer have this email address.



### No answer

This message could be caused if the recipient's email system was found on the Internet, however it does not respond. Volgistics attempted to deliver the message periodically over a twenty-four hour period and received this failure notice each time.

### Exceeds size limit

This message could be caused if the recipient's email system rejected the message because the message or its attachment is larger than the recipient's email system permits.

### Rejected

This message could be caused if the recipient's email system was found and it answered, however it reported that it will not accept your message. This could be due to the following reasons:

- The recipient's email system uses a SPAM filter which blocked your message for some reason.
- The recipient's email system will only accept mail from certain senders and your address (or mailer@volgistics.com and/or volunteermail@volgistics.com) is not one of their chosen senders.

### Unknown

This message could be caused if the recipient's mail system returned the message as undeliverable, but did not give a specific reason for the failure.

### **How soon will an email message failure be reported?**

This depends on what causes the failure. If the recipient's email system reports that an email address is invalid right away, the message will be identified as failed and the red icon will appear on the volunteer's message history within a few minutes of the time you send the message.

If there is a connection problem with the recipient's mail system, Volgistics will continue to try to deliver your message periodically for up to twenty-four hours. If the recipient's mail system still cannot be reached after twenty-four hours, the message is then flagged with the red failure icon. In these cases the message failure would not be apparent for twenty-four hours.

If a recipient's mail system accepts your message for delivery, but then later returns a failure notice, Volgistics will flag the message with the red failure icon once it receives the failure notice.

A message will appear in the Messages box with a green message icon until it is known to have failed. If the message icon does not change to red within twenty-four hours after a message has been sent, it is likely the message was delivered to the recipient's mailbox.

### **Reasons for Text Message Not Being Delivered**

When text messages fail to be delivered, the system will note that the message failed with the icon below:



If you place your cursor over the icon, a message will appear with more information about why the message could not be sent via text. More information on each of these messages follows:

#### VicNet disabled

This will appear if the *Disabled* box is checked on the [Vic tab \[pg:1810\]](#) of the volunteer's record. [VicNet \[pg:1724\]](#) is required by regulations because it allows volunteers to set their message preferences. If VicNet access is blocked, the text message will fail. If you un-check the *Disabled* box, the volunteer will be able to receive text messages as long as none of the other restrictions apply.

#### Unknown failure

This message will appear if Volgistics receives a response back from the SMS gateway that a message was not successfully delivered. The actual reason for the failure could include things such as the recipient's cell phone number was not in service, the recipient was out of range, the recipient's cell phone provider was not able to receive and forward the message, and more. However, we do not receive any details as to what the actual reason is so these are all listed under *Unknown failure*.

### **Email Address and Text Number Validity**

A volunteer's message history provides an excellent tool for discovering bad volunteer email addresses and text numbers in your database. Volgistics automatically marks volunteer email addresses and text numbers as "bad" after they receive a certain number of failures. This is shown in the [Email Address Validity \[pg:0377\]](#) and [Text Number Validity \[pg:0333\]](#) fields on the [Core tab \[pg:1868\]](#) of the volunteer record.

---

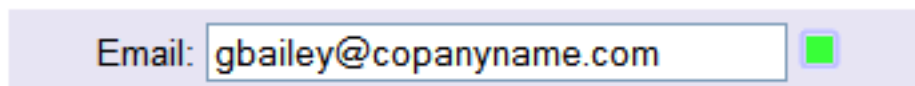
## **Email Address Validity**

Help topic 2065

Added or revised 10-05-2016

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Volgistics helps you identify invalid email addresses in your volunteer records by placing an *email validity* icon next the email address field on the [Core tab \[pg:1868\]](#) in each volunteer's record. An example of this appears below:



This is what the email address validity icon means:

The email address is blank, or no messages have been sent to this email address yet.
All of the most recent email messages sent to this address were delivered without any failures. This indicates a valid email address.

At least one of the most recent email messages sent to this address failed. It may be that this is a valid email address, but the recipient's mail system was experiencing some difficulty at the time a message was sent to them.

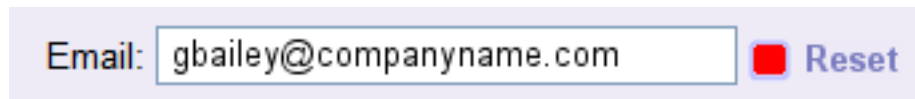
An invalid email address. There are three reasons that an email address could be marked invalid:

- All of the most recent email messages sent to this address failed.
- The "No email" checkbox in the volunteer or Coordinator record is checked--meaning that you do not want to send email to this person for some reason.
- This volunteer or Coordinator has opted-out of all email (they have asked that no additional email be sent to this email address)

To determine which of these reasons apply to this email address, move the mouse pointer over the red icon. Once an email address is identified as invalid no additional email will be sent to that address unless you reset the email address as explained below.

## Reset

If an email address is invalid because all of the most recent messages sent to the address failed, or if the recipient has [opted-out \[pg:0381\]](#) of all email, a *Reset* link will appear next to the email validity field as shown here:



You can get more information about why the *Reset* link is appearing by looking at the Email Preferences box on the volunteer's Profile tab or the [Messages box \[pg:0370\]](#) on the volunteer's History tab. An example of how this might appear is shown below:



You can click the

*Reset*

link to remove the invalid icon;

*however*

, you should only reset an email address if you know that the recipient wants to receive your email, and if you believe the address is currently valid. Resetting email addresses that are marked invalid because the recipient opted-out means that you may be sending email to someone who has asked you not send them any additional email. This can jeopardize your email "reputation" with the recipient's email provider and adversely affect your ability to send email to others at the same domain (for example, yahoo.com or gmail.com). [Help topic 2101 \[pg:0384\]](#) explains more about why it is important to respect email opt-outs.

### How Volgistics determines email address validity

Volgistics determines an email address' validity by looking at the results of the email messages you send. By default, Volgistics looks at the last three messages you've sent. If all three were delivered without failure, the address' validity is marked with the green icon. If one or two of last three messages sent to this address failed, but at least one was successful, Volgistics marks the address with the yellow icon. If all of the last three messages sent to this address failed, Volgistics marks the address with a red icon.

You can optionally [change the default failure threshold \[pg:0379\]](#) of these messages to another value in Setup.

---

## Email and Text Message Failure Threshold

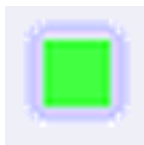
Help topic 2066

Added or revised 04-25-2014

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The *email failure threshold* and the *text message failure threshold* are setup options used to control how far back Volgistics looks at a volunteer's message history to determine if their email address and/or text message number are valid or not.

Volgistics determines an [email address's \[pg:0377\]](#) validity, or the [text message field's \[pg:0333\]](#) validity, by looking at the results of the messages you send. By default, Volgistics looks at the last three messages you've sent. This is the *threshold*. If all three were delivered without failure, the field's validity is marked with the green icon:



If one or two of last three messages sent failed, but at least one was successful, Volgistics marks the address with the yellow icon:



If all three of the last messages sent failed, Volgistics marks the email or text field with a red icon:



To change how far back in the message history Volgistics looks to determine the field's validity:

1. Choose [Setup \[pg:0887\]](#) from the menu.
2. Select *Messages*.
3. Select *Message types*.
4. In the box at the bottom of the page, set the

*Email failure threshold*

and/or

*Text Message failure threshold*

' to the desired value. Note, the *Text Message failure threshold* option will not appear unless you've [enabled text messaging \[pg:0321\]](#) in your account.

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## Is it possible to "recall" a message I sent?

Help topic 2073

Added or revised 04-29-2014

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You can send messages to volunteers through Volgistics in three ways. They can be sent as [Email \[pg:0404\]](#), [Vic Mail \[pg:0315\]](#), and [text messages \[pg:0343\]](#). Messages can also be sent as a combination of these methods. For example, you could send a message as both a text and a Vic Mail message.

Your options to "recall" a message that was sent are different depending on which way the message was sent.

### **Vic Mail**

Messages sent as Vic Mail appear for volunteers to read at the optional [VicNet \[pg:1724\]](#) or [VicTouch \[pg:1778\]](#) modules.

You *can* remove messages posted for volunteers through VicNet or VicTouch like this:

1. Choose Mailbox from the menu.
2. Click the [Out Box \[pg:0362\]](#) tab.
3. Click on the Subject of the message you want to delete.
4. Click the **Delete** button in the lower right corner.

For a Vic Mail message sent through VicNet, when you delete a message any volunteers who have not yet viewed the deleted message will never see the message. For volunteers who have viewed the message already, the message will no longer appear in the "Old messages" section of the VicNet Mail tab.

With Vic Mail messages sent through VicTouch, volunteers see these once when they complete the sign-in or the sign-out process. So if they have signed-in or out since the message was sent, they likely read it already. If they have not signed-in or out since the message was sent, deleting the message will prevent them from reading it the next time they sign-in or out.

## Email

Messages sent as Email are sent as standard Internet email. Unfortunately, there is not a way to recall Internet email.\* Volgistics does not hold outbound email messages for any reason so there is not a way to recall a message sent via Internet email once you click the **Send it now** button.

\*Technically email can be "recalled" in circumstances where the sender and the recipient *both* use the same email system. For instance when the sender and the recipient *both* use AOL or Microsoft Exchange Server and the recipient's email system is configured to honor requests to recall mail. Generally this only occurs in inter-office email systems. Most Internet mail systems do not support any method for recalling messages.

## Text message

Messages sent as text messages (SMS) are sent as standard text messages. Unfortunately, there is not a way to recall text messages. Volgistics does not hold outbound text messages for any reason so there is not a way to recall a message sent via text message once you click the **Send it now** button.

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## Introduction to Message Preferences

Help topic 2100

Added or revised 08-01-2014

---

Volgistics provides volunteer and [Coordinator \[pg:0163\]](#) message preference features needed to ensure the integrity of automatic and mass email and text messages you send. These features enable volunteers and Coordinators to opt-in or opt-out of different types of automatic or mass email and text messages your organization may send. They can also opt-out of messaging entirely if they choose.

We require this to be used because Internet Service Providers (ISP) and cell phone companies often blacklist organizations as spammers if mass messages are sent without opt-out features. This would mean that your email or text messages would not be delivered by the ISP or cell phone company.

### How it works

You setup different types of messages in your account to describe the different varieties of messages you will typically send. [Help topic 1023 \[pg:1321\]](#) describes how to do this.

Fields to allow volunteers to select which types of email messages they want to receive can be included on [application forms \[pg:0413\]](#) and in the [VicNet \[pg:1724\]](#) module. The volunteer's selections are shown on the Profile tab of the volunteer's record.

Core Profile Service Schedule History Contacts Notes Vic

Save Cancel  Tagged New Previous Next

**Personal**

Date of birth: 11-16-1981  Age: 32  Omit from birthday lists

Gender: Female ▾

**Email Preferences** ⓘ

<input checked="" type="checkbox"/> Schedule reminders	<input checked="" type="checkbox"/> Checklist reminders
<input checked="" type="checkbox"/> Continuing education	<input checked="" type="checkbox"/> Electronic newsletters
<input checked="" type="checkbox"/> Important information	<input checked="" type="checkbox"/> Recruitment appeals
<input type="checkbox"/> Team leader update	<input type="checkbox"/> Volunteer group update

**Availability**

If you [enable text messaging \[pg:0321\]](#) for your account, volunteers and Coordinators will select their text and/or email preferences when they [opt-in for text messaging \[pg:0323\]](#).

Additionally, when you send email through Volgistics the system adds a message at the bottom of the email with a link that can be used to update message preferences. There are four choices for how the message is worded. You can change the selection on the [Message Ground Rules \[pg:1930\]](#) page.

Here is an example of one choice as it would appear for an organization named *Great Lakes Volunteers*.

You received this mail through your affiliation with Great Lakes Volunteers. You may change your message preferences with Great Lakes Volunteers at

<https://www.volgistics.com/ex/syst.dll?ACT=80&KEY=83957&PW=4872933001&PN=283009>

When a mail recipient clicks this link in an email message you've sent them (or copies the link to the address line of their web browser), they reach a web page similar to this:



## Volunteer Message Preferences

Please help us communicate with you better by allowing us to send email or text messages. Please select the types of messages you wish to receive.

Click the "Save" button when you are finished.

### Send me...

Email	Text Message	None
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- Schedule reminders  
Handy reminders to help you remember when you're scheduled to serve.
- Checklist reminders  
Reminder messages for when you're due for things such as training, TB tests, flu shots, etc.

Email	Email with text notification	None
-------	------------------------------	------

- Continuing education  
Updates on education programs including new course offerings, and class times and locations.
- Electronic newsletters  
News about what's happening in the Volunteer Services Department.
- Important information  
Only used to communicate important news that affects you. Please DO NOT opt-out of this type of message.
- Recruitment appeals  
Stay informed of new opportunities to serve.
- Team leader update  
Information for Coordinators who lead volunteer teams.

**Please remove me from all messages.**  
I no longer wish to receive any volunteer messages from Great Lakes Volunteers.

← Click Save to save your settings

When a volunteer or Coordinator has opted-in to text messaging, the page will also include options for text message preferences.

If a volunteer or Coordinator opts-out of all email and text messages, the email validity icons next to the Email and Text fields will turn red.

Email:

For volunteers, this choice will also be noted in the Message Preferences box on the Profile tab of their record, as well as the [Messages box \[pg:0370\]](#) on the History tab of their record.

If the recipient opted-out of all messages by mistake and lets you know they want to opt back in, you can click the

**Reset**

link next to the Email field to reverse this. However, regulations do not allow you to change a person's text preferences. They will need to repeat the [opt-in process \[pg:0323\]](#) if they want to receive text messages again.



Because an individual's request to no longer receive messages from your organization may indicate a change in her or his relationship with your organization, Volgistics can automatically alert you when this happens. You receive these alerts on the [In Box \[pg:0303\]](#) tab of your Volgistics mailbox. If they are not already turned-on, you can enable these alerts in Setup. To do this, select [Setup \[pg:0887\]](#) from the menu, choose Messages, then select *Volunteer message preferences*, or *Coordinator message preferences*. Help topics [1068 \[pg:1327\]](#) and [1025 \[pg:1325\]](#) explain more.

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## Why It Is Important To Provide Message Opt-Out Features

Help topic 2101

Added or revised 10-31-2016

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While email and text messages are often a great way to communicate, message recipients are understandably particular about the kinds of messages that are sent to them. As the sender of email and text messages, you must observe certain message etiquette. This is especially important when it comes to sending automatic and mass email or text messages, as you can through Volgistics.

While one would hope that people who make it into your volunteer database will always be receptive to all communication you choose to send them, this may not always be the case. For one reason or another, volunteers, potential volunteers, and others you communicate with through Volgistics might not want to continue receiving messages from you, or they may want to receive only certain [kinds of messages \[pg:1321\]](#).

Providing message recipients with an easy way to view or change their message preferences with your organization (often called an "opt out" capability) is an important part of being a responsible message sender. The failure to provide such features can quickly cause you trouble. For example, in an effort to reduce spam, a growing number of email providers (such as Hotmail, Gmail, Yahoo, and AOL) have filters that block email sent by certain "blacklisted" senders. Cell phone service providers (such as Sprint, T-Mobile and AT&T) have similar methods in place to prevent spammed text messages.

If your organization is blacklisted (even inappropriately or unfairly), your messages may no longer reach many of your volunteers or [Coordinators \[pg:0163\]](#), no matter what the content of your messages is.

These blacklists are compiled and widely shared by email providers, cell phone companies, and independent "watchdog" groups for the benefit of all consumers. Any message recipient can report any message they choose to these groups as suspected spam (this is as easy as a mouse click in some email programs). When this happens, the watchdog group usually evaluates the message before the original sender is added to the blacklist. A message is less likely to be labeled spam (and the sender less likely to be blacklisted) if it includes a legitimate link to an opt-out feature recipients can use to remove themselves from future mailings.

Volgistics provides this kind of opt-out/opt-in feature automatically as shown in [help topic 2100 \[pg:0381\]](#). When you send automatic or mass email to volunteers or Coordinators, Volgistics automatically includes a link to the volunteer's or Coordinator's message preference settings.

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## Can I make email addresses compulsory?

Help topic 2102

Added or revised 08-18-2014

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Email is often a great way to communicate. So much so that some volunteer leaders use email as the primary method of formal communication with volunteers and [Coordinators \[pg:0163\]](#).

Some volunteer leaders may wish to require that every volunteer, or Coordinator, provide an email address, and receive email messages from their organization. With the growing popularity of email, it may not be unusual for all of the volunteers in *some* organizations to have email addresses. However, this is not always the case in *all* organizations. If your organization is one where it is reasonable to assume that every person will have an email address, you can make some email address features a requirement.

1. You can make the Email address field on the [Core tab \[pg:1868\]](#) of volunteer records and the Coordinator tab of Coordinator records required fields. When you add new volunteer or Coordinator records in Volgistics, an email address would be required to complete the entries on the page. [Help topic 2017 \[pg:0957\]](#) has information on how to do this.

2. You can make the Email address field on on-line volunteer application forms a required field. [Help topic 1056 \[pg:1341\]](#) has information on how to do this.

If you use [VicNet \[pg:1724\]](#), volunteers use their email address as their VicNet login name.

While organizations may make an email address a requirement, keep in mind that it is not technically possible to force an individual to receive email from your organization (or anyone, for that matter).

Volgistics provides important volunteer and Coordinator [message preference \[pg:0381\]](#) features through which volunteers and Coordinators may set their own message preferences, and even discontinue receiving messages from you altogether. Even if these features were not available in Volgistics, recipients can block email and text messages from certain senders in their own email program or on their own cell phone.

If your ability to send email to every volunteer is important to you, you can always monitor volunteer message preference settings on the Profile tab, and Coordinator message preferences on the Coordinator tab. When a volunteer or Coordinator has chosen to opt-out of receiving all types of messages from your organization, the [email validity \[pg:0377\]](#) and [text number validity \[pg:0333\]](#) icons on their record will be changed to red. While a [System Operator \[pg:0065\]](#) can reset the email options, please keep in mind that recipient's preferences should be respected. The capability to change volunteer or Coordinator email preferences should only be used in the rare occasion when a volunteer or Coordinator inadvertently opts-out of all email types and you can confirm that this selection was made by mistake.

You can setup Volgistics to send an alert to the [In Box \[pg:0303\]](#) tab of your Volgistics mailbox whenever a volunteer or Coordinator chooses not to receive any messages from your organization. [Help topic 1068 \[pg:1327\]](#) shows how to do this for volunteers. [Help topic 1025 \[pg:1325\]](#) shows how to do this for Coordinators.

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# How can I personalize email messages with the volunteer's information?

Help topic 2103

Added or revised 10-04-2016

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It is sometimes useful to personalize email messages to include volunteer names, volunteer PIN's, or a link to allow volunteers to reset their VicNet passwords. This can be helpful to personalize your message to improve responses. You can do this by using the codes described in this help topic.

When these codes are inserted in email messages, volunteers will see their own information instead of the code. For example, if you would like to send an email that addresses the volunteer by first name, you can start the message like this:

Hi `[[firstname]]`,

We are writing to remind you . . .

When the volunteers receive this message, they will see their name in place of the `[[firstname]]` code. For example, if the volunteer who receives the message is named "Jessica," she will see:

Hi Jessica,

We are writing to remind you . . .

## Available Codes

**`[[firstname]]`** – This will place the volunteer's first name in the message.

### **`[[friendlyname]]`**

– This will place the volunteer's nickname in the message. If there is no information in the *Nickname* field on the [Core tab \[pg:1868\]](#) of the volunteer's record, then his or her first name will be used.

**`[[name]]`** – This will place the volunteer's first and last names in the message.

**`[[number]]`** – This will place the volunteer's PIN in the message. This is the number in the [Number field \[pg:1856\]](#) on the [Core tab \[pg:1868\]](#) of the volunteer's record, and it is used by volunteers to sign-in to the [VicTouch \[pg:1778\]](#) module.

**`[[password]]`** – This will place a link in your message to a URL address volunteers can use to set their [VicNet \[pg:1724\]](#) password. Depending on how the volunteer's email system processes HTML commands, the link could appear several different ways such as:

- A clickable link with the words *Click for password*.
- A clickable link using the URL address to reset the password, such as <https://www.volgistics.com/ex/portal.dll/?FROM=1234&ACT=34>.
- A non-clickable link using the URL address to reset the password, such as <https://www.volgistics.com/ex/portal.dll/?FROM=1234&ACT=34>.

Because some volunteers may receive the URL as a non-clickable link, you may want to use a phrase such as ". . .if this does not appear as a clickable link, copy and paste the URL address into your web browser. . ." in the text around where you insert the email code.

Volunteers will need to use the link to request a password link to be sent to them by email. Once they complete the steps to request the link, they will receive an email to set a permanent password. [Help topic 1307 \[pg:1975\]](#) shows how this process works.

**Please note:**

There are other ways to communicate with volunteers regarding their VicNet passwords. The `[[password]]` code is just one of the ways volunteers can find out the password they will use to sign-in to VicNet. You can find information on the other methods available for VicNet passwords in [help topic 1158 \[pg:1925\]](#).

Where Codes Work

These codes can be used in all email messages that are [sent from your Volgistics Mailbox \[pg:0404\]](#). They can also be used when you setup the automatic emails Volgistics can send to volunteers such as the [Checklist reminder emails \[pg:0916\]](#), the monthly and daily [schedule reminder emails \[pg:0791\]](#), and the [VicNet password email \[\\_\\_\\_\\_\\_\]](#).

However, there are some messages the codes will not work in. The codes will not work in email messages sent to [Coordinators \[pg:0163\]](#), the automatic [Receipt Confirmation \[pg:1349\]](#) message sent when applicants submit an online application, or in any message sent by [Vic Mail \[pg:0315\]](#) or by [text message \[pg:0343\]](#).

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## In Box Report Capacity

Help topic 2109

Added or revised 09-26-2013

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Each time you print a report, Volgistics delivers the printed report to your In Box as a PDF or Excel file. From there you can either [print it, or save it \[pg:0446\]](#) to your computer if it's a report you would like to keep.

Your In Box holds up to twelve printed reports per system operator. Once a system operator has twelve printed reports in their In Box, Volgistics automatically deletes their oldest report to make room for the next report they print.

This limit applies only to the number of printed report PDF files that can accumulate for a single system operator in the In Box, not to the number of reports you can setup in Volgistics.

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# Mailbox Documents Tab

Help topic 2142

Added or revised 12-11-2015

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The Documents tab of the Volgistics mailbox has two purposes. It is used to store documents that are used as [email \[pg:0404\]](#) attachments or are linked to the [VicNet Home tab \[pg:1486\]](#), and it is used to manage documents stored with the [VicDocs \[pg:1648\]](#) feature.

To get to the Documents tab of the Mailbox:

1. Select Mailbox from the [menu \[pg:0215\]](#).
2. Select the Documents tab on the far right side.

The Documents tab is divided into two or more sub-tabs depending on your account's [service level \[pg:0719\]](#). All accounts have *Attachments* and *Volunteers* sub-tabs. If your account includes the [VicDocs \[pg:1648\]](#) module, you may also see *Coordinators*, *Sites*, *Places*, and *Assignments* sub-tabs.

Click on a link in the *Contents* box below to learn more about how to use the sub-tabs.

## Contents

### Attachments Sub-Tab

Open or Print Documents  
Save Documents Locally  
Delete Documents  
Sort Documents  
Files Linked to the VicNet Home Tab  
Upload Documents  
Document Storage Capacity  
Site Level Access and the Attachments Sub-Tab

### Volunteers & Other Sub-Tabs

Filter Documents  
Reset the Filter  
Number of Documents Shown  
Sort Documents  
Open or Print Documents  
Save Documents Locally  
Rename Documents  
Delete Documents  
Site Level Access and the Volunteers & Other Sub-Tabs

### Attachments Sub-Tab

To get to the Attachments sub-tab, go to the Documents tab of the mailbox and then click the Attachments sub-tab if necessary.

## Mailbox



The Attachments sub-tab has two purposes. It is used to upload and manage [PDF \[pg:0449\]](#) or Microsoft Word (DOC or DOCX) documents so they can be used as [email \[pg:0404\]](#) attachments. It is also used to upload files you want to link to the [Home tab \[pg:1486\]](#) in [VicNet \[pg:1724\]](#).

The top section of the Attachments sub-tab is where you will see documents that have already been uploaded to the sub-tab. The bottom section of the Attachments sub-tab is used to upload new documents to the sub-tab.

The help topic sections below have more information.

### **Open or Print Documents**

In many cases you can just click on a document's file name to open the document. Your web browser will launch the program it needs to open the document. In some cases your web browser's settings are not configured to recognize the file type so the file will not open. In this case, you will either need to change your web browser's settings so that it associates the correct program with the file extension, or you can often save the document to your local computer and open it from the saved location. The [Save Documents Locally](#) section below shows how to do this.

Once the document has been opened with the appropriate program, you can send it to your local printer by using the print feature in whatever program you're using.

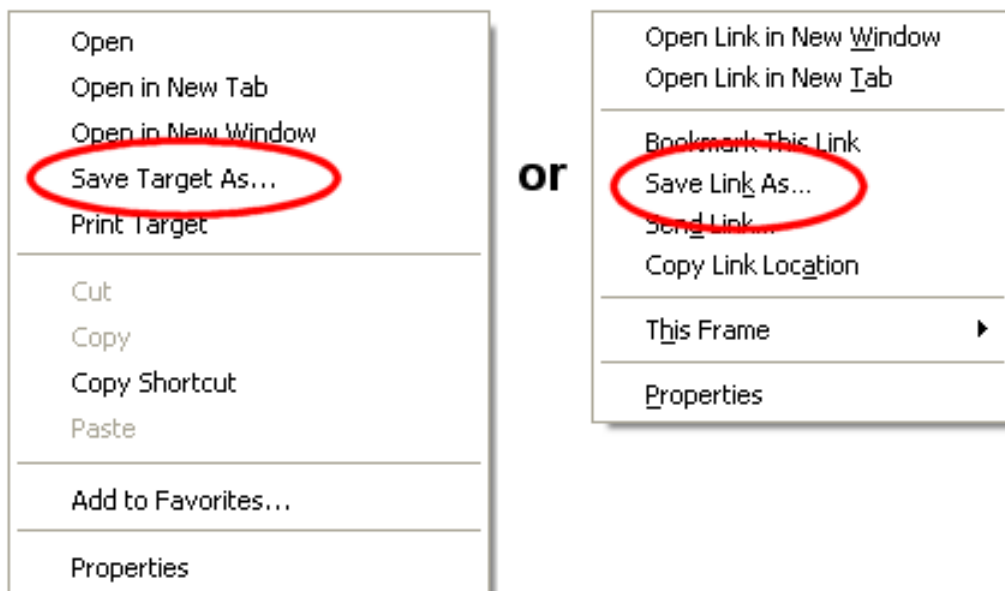
Many web browsers are using built-in PDF viewers now instead of the

Adobe Reader

program. This can also cause trouble with opening PDF documents. In this case, you may need to disable the built-in viewer if you do not want to save the file locally. You can find more information on how to do this in [help topic 2176 \[pg:1606\]](#).

### **Save Documents Locally**

You can save uploaded documents to your local computer (flash drive or other storage medium) without opening the file if you wish. To do this, right-click on the name of the document and then select "Save target as...", "Save link as..." or "Save as..." from the prompt.



### Delete Documents

To delete uploaded documents, check the box in the column on the left side by each document you want to delete. If you want to delete all of the documents on the page, scroll down to the bottom of the top section and click the **Check all** button. Once the documents you want to delete are marked, click the **Delete** button. A pop-up will appear to make sure you want to completely delete the documents. Click the **OK** button to proceed or the **Cancel** button if you changed your mind and you would like to keep the documents.

*There is not a way to recover documents after they have been deleted so please make sure you want to delete the documents before you proceed.*

### Sort Documents

By default the Attachments Sub-Tab is sorted alphabetically based on the *File Name* column. You can change the view to be sorted by the *Kind*, *Uploaded*, or *Linked?* columns instead. Just click on a column heading to sort the view based on that column's information.

Documents ⓘ				
<a href="#">Kind</a>	<a href="#">File Name</a>	<a href="#">Uploaded</a>	<a href="#">Linked?</a>	<input type="checkbox"/> All sites ⓘ
<input type="checkbox"/> PDF File	<a href="#">2013 Required Education Part One.pdf</a>	02-15-2013 8:58 a	Yes	
<input type="checkbox"/> DOCX File	<a href="#">ArchivedVsNonArchivedRecords.docx</a>	06-08-2012 4:19 p	Yes	
<input type="checkbox"/> PDF File	<a href="#">Assignment description sheets.pdf</a>	03-03-2015 12:40 p		
<input type="checkbox"/> PDF File	<a href="#">Fact Sheet 2011 (Arboratum).pdf</a>	01-23-2013 8:04 a		

### Files Linked to the VicNet Home Tab

Documents with *Yes* in the *Linked?* column are files that currently have links from the [Home tab \[pg:1486\]](#) in [VicNet \[pg:1724\]](#). This allows volunteers and [Coordinators \[pg:0163\]](#) to click on the file to open it when they are logged in to VicNet. Deleting these documents will cause the associated links to be removed from the VicNet Home tab.

### Upload Documents

You can upload [PDF \[pg:0449\]](#) or Microsoft Word (DOC or DOCX) documents to the Attachments sub-tab as long as the file is 10 megabytes or smaller. If you're uploading a PDF file, we recommend optimizing it before uploading even if it is under the size limit. The reason for this is optimizing reduces the file size, which has many

advantages. It assures your message will be delivered if the recipient's ISP limits file sizes; it allows your message to be processed faster, which could speed up delivery; and the file will also open faster when your volunteers and/or [Coordinators \[pg:0163\]](#) view it.

The method you use to optimize the file will depend on the program you use to create it. We have included some links that have more information on how to optimize your file for commonly used programs.

- If you use Microsoft Word and the "Save as" function to save in the PDF format, select "Minimum Size (publishing online)" as the "Optimize for" option. More information.
- If you use Adobe Acrobat, use the PDF Optimizer under the Advanced menu. More information.
- If you use a Nuance program (such as PDF Converter Pro or PDF Converter Enterprise), select Tools then "Optimize PDF." More information.

If you use a different method, program, or version of one of the programs listed to create your PDF files, you may need to search the Internet, or refer to the help documentation for the program you use, for information on how to reduce the file size.

Here are the steps to upload documents to the Attachments sub-tab:

1. Click the **Choose File** or **Browse** button in the bottom section of the sub-tab.
2. In the dialog window that appears, select the PDF, DOC or DOCX file you want to upload then click the **Open** button.
3. Click the **Upload** button. Once the upload is complete, your document will be listed in the Documents box at the top of the sub-tab.

### **Document Storage Capacity**

The number of documents you can store on the Attachments sub-tab of the Documents tab is based on the number of [System Operators \[pg:0065\]](#) in your account's [service level \[pg:0719\]](#). The document storage capacity is 15 files, plus 5 additional files for each System Operator. For example, if your account's service level includes space for three System Operators, you would have space for 30 documents (15 + 15). Or if your account's service level includes space for five System Operators, you would have space for 40 documents (15 + 25).

### **Site Level Access and the Attachments Sub-Tab**

If an organization uses [Site Level Access \[pg:0092\]](#) and a [System Operator \[pg:0065\]](#) is logged in as a headquarters-level operator (someone with access to "All Sites"), the Attachments sub-tab will have a checkbox for

*All Sites*

in the upper right corner. If this box is checked, the operator will see documents associated with a specific Site in the account as well as documents that are not associated with any specific Site. If the *All Sites* box is un-checked, the headquarters-level operator will not see documents uploaded by [Site-level Operators \[pg:1442\]](#).

Users logged in as Site-level Operators (someone associated with one specific Site) will not see the *All Sites* checkbox on the Attachments sub-tab. Site-level operators will only see documents associated with their Site on the Attachments sub-tab.

### **Volunteers & Other Sub-Tabs**

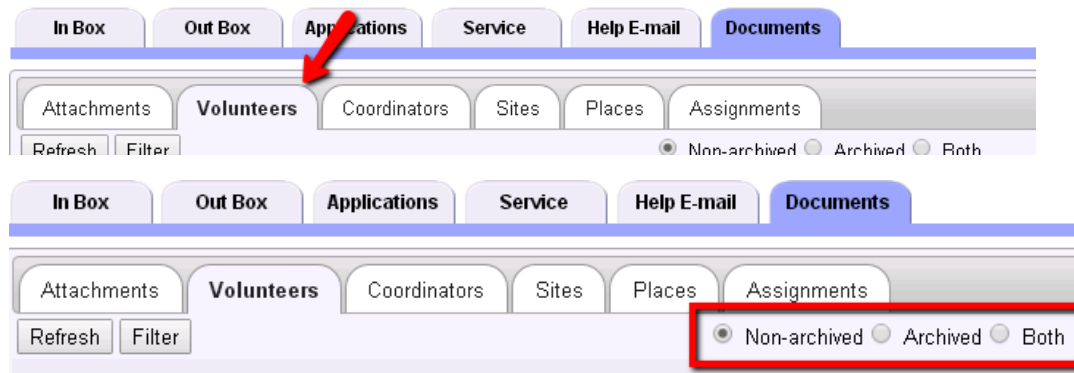


The other sub-tabs on the Documents tab are used to manage the documents uploaded to the Docs tab of volunteer, Coordinator, Site, Place, and Assignment records. All accounts will have the Volunteers sub-tab. The other sub-tabs will only appear if both of the following apply:

1. The [VicDocs \[pg:1648\]](#) module is included in your account's [service level \[pg:0719\]](#).
2. Your [System Operator \[pg:0065\]](#) rights allow access to the Docs tab of the record type. System Operator rights for the Docs tabs are set by your account's [Administrator \[pg:0052\]](#) as shown in [help topic 2553 \[pg:1319\]](#)

All of the sub-tabs used for VicDocs are pretty much the same except for the differences noted in the box below. Because the sub-tabs are essentially the same, we will just use the Volunteers sub-tab as the example on how to use all of the sub-tabs. To get to the Volunteers sub-tab, go to the Documents tab of the mailbox and then click on the sub-tab.

## Mailbox



## Filter Documents

You can filter the sub-tab to only show certain documents. To do this, click the **Filter** button in the top left corner. This will open a dialog box like the one shown below:

The 'Filter' dialog box contains the following fields and controls:

- Volunteer:
- File Name:
- Kind:  (dropdown menu)
- Uploaded From:
- Uploaded To:
- Submit
- Reset

Here are the options for filtering the documents. Please note that you can use more than one option at the same time to refine the documents shown. The filtered view will only show documents that meet all of the requirements you select.

**Volunteer:** Type the first part of the last name of the volunteer record you want to see. The more characters you enter, the more refined the filter will be. Please note that the system cannot filter beyond the last name field. So if two or more volunteers have the same last name, the documents for all volunteers with that last name will be shown.

**File Name:** Type the first part of the name of the file you want to see. The more characters you enter, the more refined the filter will be.

**Kind:** Use the dropdown to select which type of document files you want to have shown.

**Uploaded From:** Enter a date to limit the sub-tab to just documents uploaded on or after a certain date.

**Uploaded To:** Enter a date to limit the sub-tab to just documents uploaded on or before a certain date.

### Reset the Filter

If your view of the sub-tab is currently filtered, there will be a **Reset Filter** button to the right of the word **Documents** at the top left of the sub-tab.



Click the **Reset Filter** button to return the sub-tab to the un-filtered view.

### Number of Documents Shown

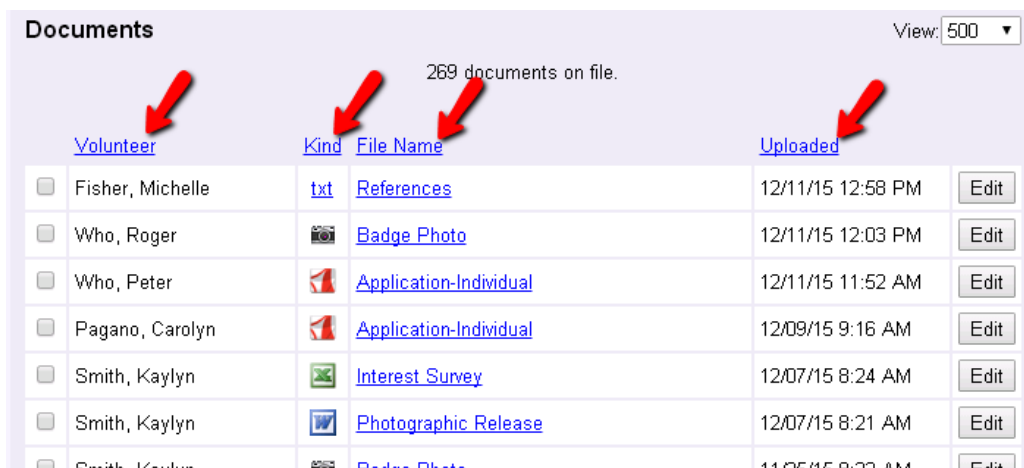
You can control the number of documents shown on the sub-tab. The view is set to the first 100 documents by default. Please note that as you increase the number of documents shown, the amount of time it takes for the web page to load will also increase.

To change the number of documents shown, select the number you'd like from the *View* dropdown list and then click the **Refresh** button in the top left corner of the sub-tab.



### Sort Documents

By default the Sub-Tab is sorted according to the order the documents were added to your database. You can change the view to be sorted by the *Volunteer*, *Kind*, *File Name* or *Uploaded* columns instead. Just click on a column heading to sort the view based on that column's information.



Documents View: 500 ▾

269 documents on file.

<a href="#">Volunteer</a>	<a href="#">Kind</a>	<a href="#">File Name</a>	<a href="#">Uploaded</a>	
<input type="checkbox"/> Fisher, Michelle	txt	<a href="#">References</a>	12/11/15 12:58 PM	<input type="button" value="Edit"/>
<input type="checkbox"/> Who, Roger		<a href="#">Badge Photo</a>	12/11/15 12:03 PM	<input type="button" value="Edit"/>
<input type="checkbox"/> Who, Peter		<a href="#">Application-Individual</a>	12/11/15 11:52 AM	<input type="button" value="Edit"/>
<input type="checkbox"/> Pagano, Carolyn		<a href="#">Application-Individual</a>	12/09/15 9:16 AM	<input type="button" value="Edit"/>
<input type="checkbox"/> Smith, Kaylyn		<a href="#">Interest Survey</a>	12/07/15 8:24 AM	<input type="button" value="Edit"/>
<input type="checkbox"/> Smith, Kaylyn		<a href="#">Photographic Release</a>	12/07/15 8:21 AM	<input type="button" value="Edit"/>
<input type="checkbox"/> Smith, Kaylyn		<a href="#">Badge Photo</a>	11/05/15 8:22 AM	<input type="button" value="Edit"/>

### Filtering & Sorting and the Number of Documents Shown

when you filter or sort a sub-tab, the action is performed on all documents that are currently uploaded. The results of your filtering or sorting may contain more documents than your View dropdown is setup to show. For example, if you have the View dropdown setup to show the top 25 documents, and you filter to see documents uploaded after a certain date, you may have more than 25 documents uploaded after the date selected. However, only the first 25 matches will appear because of the View dropdown restriction.

### Open or Print Documents

In many cases you can just click on a document's file name to open the document. Your web browser will launch the program it needs to open the document. In some cases your web browser's settings are not configured to recognize the file type so the file will not open. In this case, you will either need to change you web browser's settings so that it associates the correct program with the file extension, or you can often save the document to your local computer and open it from the saved location. The Save Documents Locally section below shows how to do this.

Once the document has been opened with the appropriate program, you can send it to your local printer by using the print feature in whatever program you're using.

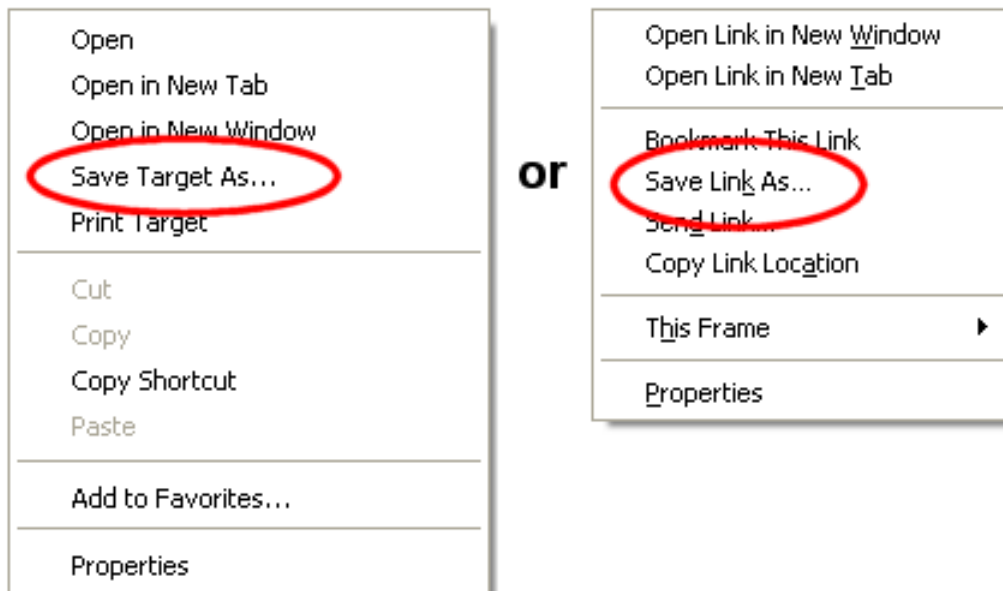
Many web browsers are using built-in PDF viewers now instead of the

Adobe Reader

program. This can also cause trouble with opening PDF documents. In this case, you may need to disable the built-in viewer if you do not want to save the file locally. You can find more information on how to do this in [help topic 2176 \[pg:1606\]](#).

### Save Documents Locally

You can save uploaded documents to your local computer (flash drive or other storage medium) without opening the file if you wish. To do this, right-click on the name of the document and then select "Save target as...", "Save link as..." or "Save as..." from the prompt.



### Rename Documents

You can change the name of a document if you'd like. To do this, click the **Edit** button in the far right column. This will make an *Edit Document* dialog box pop-up. Edit or replace the document's title in the pop-up box and click the **Save** button to keep your changes. You can also click the **Cancel** button to close the window without changing the document's name.

**Please note:** This will also change the document's name on the Docs tab of the [volunteer \[pg:1630\]](#), [Coordinator \[pg:1636\]](#), or [Site, Place, or Assignment \[pg:1642\]](#) record.

### The Edit button does not appear . . .

If the **Edit** button does not appear, it means your [System Operator \[pg:0065\]](#) rights do not allow you to edit documents. Your operator rights are controlled by the [Administrator \[pg:0052\]](#) of your Volgistics account as shown in [help topic 2553 \[pg:1319\]](#).

### Delete Documents

To delete uploaded documents, check the box in the column on the left side by each document you want to delete. If you want to delete all of the documents currently in view on the sub-tab, scroll down to the bottom of the sub-tab and click the **Check all** button. Once the documents you want to delete are marked, click the **Delete** button. A pop-up will appear to make sure you want to completely delete the documents. Click the **OK** button to proceed or the **Cancel** button if you changed your mind and you would like to keep the documents.

**Please note:** This will also delete the document(s) from the Docs tab of the [volunteer \[pg:1630\]](#), [Coordinator \[pg:1636\]](#), or [Site, Place, or Assignment \[pg:1642\]](#) record. Also, there is not a way to recover documents after they have been deleted so please make sure you want to delete the documents before you proceed.

### The Delete button does not appear . . .

If the **Delete** button does not appear on the sub-tab your [System Operator \[pg:0065\]](#) rights do not allow you to

delete documents. Your operator rights are controlled by the [Administrator \[pg:0052\]](#) of your Volgistics account as shown in [help topic 2553 \[pg:1319\]](#).

### Site Level Access and the Volunteers & Other Sub-Tabs

If your organization uses [Site Level Access \[pg:0092\]](#), only headquarters-level [System Operators \[pg:0065\]](#) (those who are assigned to "All Sites") will see all of the documents on the sub-tabs. [Site-level Operators \[pg:1442\]](#) (those who are assigned to one specific Site) will only see documents for volunteers, Coordinators, Sites, Places, and Assignments associated with their Site.

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## How to Send Messages to the Volunteers in a Set

Help topic 2185

Added or revised 10-28-2015

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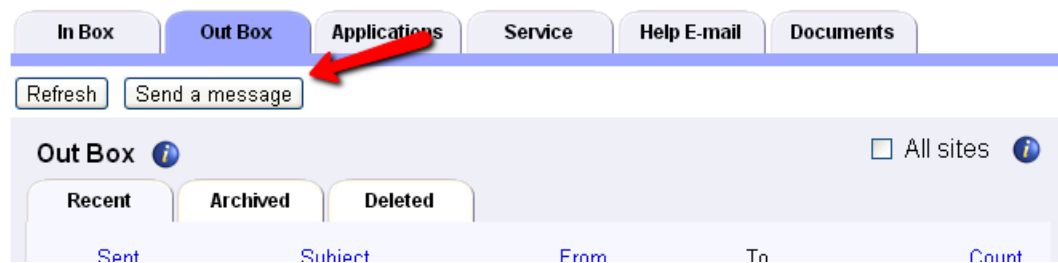
With the Volgistics [Sets \[pg:0858\]](#) feature it's easy to [send email \[pg:0404\]](#), [text messages \[pg:0343\]](#), and [Vic mail \[pg:0315\]](#) to all of the volunteers in a Set. For example, if you have a Set that includes everyone who volunteered last year, you can send a message to all of them at once.

If you've already defined the set of volunteers you want to send your message to, you're ready to start. If you haven't defined the set yet, [create the set \[pg:0859\]](#) first and then return here when you're finished.

To send a message to the volunteers in a specific set:

1. Choose Mailbox from the [menu \[pg:0215\]](#).
2. Select the [Out Box tab \[pg:0362\]](#).
3. Click the **Send a message** button.

### Mailbox



4. On the New Message window select how you'd like to send your message and *All of the volunteers in this Set*. Choose the Set of volunteers you want to receive the message from the Sets dropdown list.

**New message**

Send this message by:

- Email
- VIC mail
- Text Message

From: Operator Sample Account (sample@volgistics.com)

To: Volunteers

- 
- Tagged volunteers ( 0)
- All  volunteers
- All of the volunteers in this Set:
- All volunteers

Coordinators

5. Finish composing your message. Refer to the following help topics for more details on composing and sending each type of message:

- Email Messages- [Help topic 2195 \[pg:0404\]](#)
- Text Messages - [Help topic 1295 \[pg:0343\]](#)
- Vic Mail Messages - [Help topic 1127 \[pg:0315\]](#)

You can also send messages to different groups of volunteers *without* using a Set. The following help topics show ways to send messages to groups of volunteers without creating a Set to identify the volunteers first.

- You can send messages to all of the volunteers who have a specific Assignment, or who have an Assignment at a specific Site or Place, without using a Set. Read [How to Send Messages to the Volunteers in a Specific Site, Place or Assignment \[pg:0399\]](#) to learn how.
- You can send messages to all of the volunteers scheduled on a certain day without using a Set. Read [How to Send Messages to the Volunteers Scheduled on a Certain Day \[pg:0401\]](#) to learn how.
- You can send messages to all of a [Coordinator's \[pg:0163\]](#) volunteers without using a Set. Read [How to Send Messages to all of a Coordinator's Volunteers \[pg:0402\]](#) to learn how.
- You can send messages to all of the [tagged \[pg:1529\]](#) volunteers without using a Set. To learn how read [How to Send Messages to all of the Tagged Volunteers \[pg:0403\]](#)

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## How to Update Reply-to Fields for Email Messages

Help topic 2190

Added or revised 08-13-2014

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The Volgistics program has different types of email messages for different uses. These may each have different reply-to addresses listed. This help topic explains how to locate, and update, the reply-to addresses in use for your account.

**Please note** that some Internet Service Providers (ISP's) have started to block email messages when certain email domains are used as the reply-to address. At this point, only "@yahoo.com" and "@aol.com" email addresses are affected so these should not be used as your reply-to address. Other general domains (such as "@gmail.com," "@hotmail.com," etc.) may follow so if possible we recommend using an email address with a domain specific to your organization as your reply-to address. You can find more information on this [Here](#)

### System Operators:

Each [System Operator \[pg:0065\]](#) can have their own reply-to address listed on their record. Here is how to update these:

1. Select [Setup \[pg:0887\]](#) from the menu.
2. Expand the *System Operators* link.
3. Select an operator's name from the list.
4. Change the email address listed in the *Reply-to address* field.
5. Click the **Save** button.

You will need to repeat these steps for each System Operator in your account. Please note that if you also update the *Email address* field that controls the email address an operator uses to [login \[pg:0220\]](#) with, and use the Volgistics feature that saves login credentials, you will need to clear the cookie for the previous address used in order to save the new address. [Help topic 2056 \[pg:1597\]](#) explains how to do this.

### Automatic Email Messages:

Automatic email messages are messages that can be sent by the system on pre-determined days to your volunteers. These include [Schedule Reminder \[pg:0791\]](#) messages as well as the reminder messages setup to notify volunteers when periodic or annual [Checklist \[pg:0142\]](#) items are due. You can change the reply-to addresses for automatic email messages by:

1. Select [Setup \[pg:0887\]](#) from the menu.
2. Expand the Messages link.
3. Select *Ground rules*.
4. Change the reply-to address(es) in the *Automatic email* section.
5. Click the **Save** button.

### Receipt Confirmation Email Messages:

If you have an email message setup to be sent when a potential volunteer submits an [application \[pg:0413\]](#), you will need to change the reply-to address listed for each application form in use for your account. Here are directions on how to do this:

1. Select [Setup \[pg:0887\]](#) from the menu.
2. Expand the *Online forms* link.
3. Select *Volunteer application forms*.
4. Select the name of a form you have in use.
5. Select *Receipt confirmation*.
6. Change the address listed in the *What "reply to" email address should your acknowledgement email have (typically your email address)?* field.
7. Click the **Save** button.

You will need to repeat these steps for each application form in your account that has a receipt confirmation message in place.

### VicTouch Schedule Email Messages:

If your account uses [VicTouch \[pg:1778\]](#) and has the feature enabled to allow volunteers to request a copy of their schedule by email, there is a reply-to email address listed for this. You can change this address by:

1. Select [Setup \[pg:0887\]](#) from the menu.
2. Expand the VicTouch link.
3. Select *Schedule "Email me a copy" messages*.
4. Change the *Reply to* field.
5. Click the **Save** button.

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## How to Send Messages to the Volunteers in a Specific Site, Place or Assi

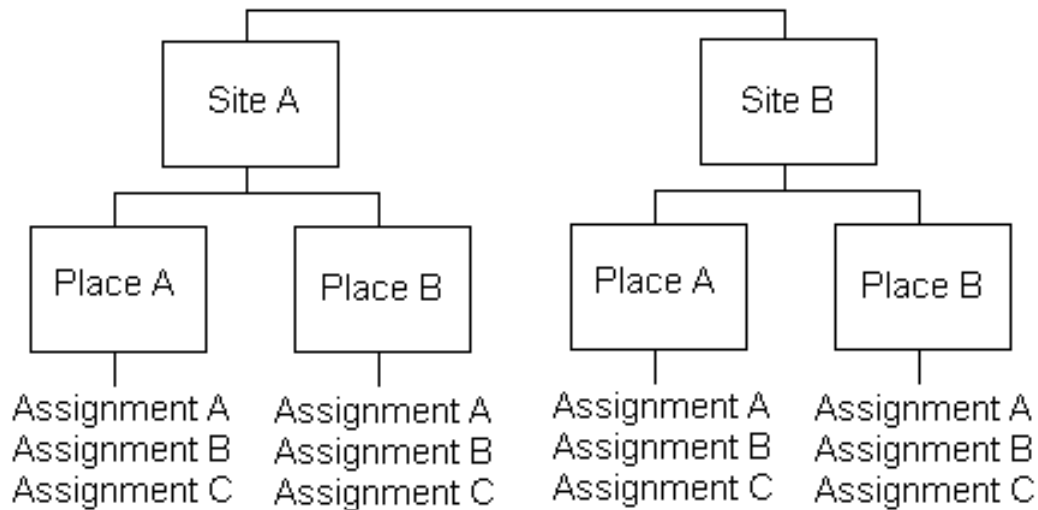
Help topic 2191

Added or revised 10-28-2015

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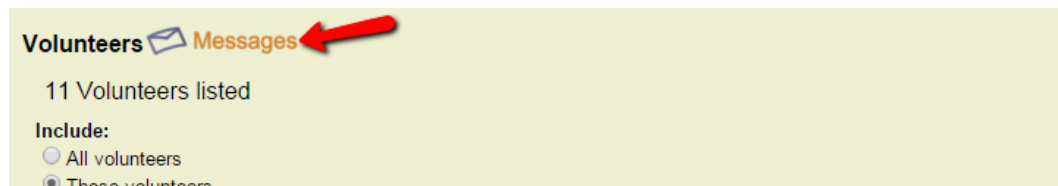
You can [organize the volunteer assignments \[pg:0096\]](#) you track in Volgistics to reflect the structure of your organization. Volgistics supports up to two levels of organization for this purpose: *Sites* and *Places*. This structure is shown in the following illustration:





It's easy to send [email \[pg:0404\]](#), [Vic mail \[pg:0315\]](#), or [text messages \[pg:0343\]](#) to all of the volunteers who have a specific Assignment, or who have an Assignment at a specific Place or Site. Here is how you can do this:

1. Choose Assignments from the [menu \[pg:0215\]](#).
2. Select the Site, Place or Assignment you want the message to be sent for.
3. Select the Volunteers tab.
4. Set the criteria for which records you want to have shown and click the **Search** button. If you need help with how to set the criteria, please see the *Search Criteria* box below.
5. Click the *Messages* icon at the top of the list.



6. Compose your message and send it out. If you need assistance with composing your message, please see [help topic 2195 \[pg:0404\]](#).

### Search Criteria

All volunteers/These volunteers

This option will only appear on Assignment records. Select *All volunteers* if you want the list to include all volunteers that have the volunteer [Statuses \[pg:1832\]](#) selected in the

**Status** section. Select *These volunteers* if you want the list to include only the volunteers who have the selected [Roles \[pg:0103\]](#) in the assignment.

### Status

Check each of the volunteer [Statuses \[pg:1832\]](#) you want to appear on the list. Check *all* of the Statuses if you want to see all volunteers who have the Assignment (or an Assignment that falls under the Site or Place) regardless of their Status.

### Role

Check each of the assignment [Roles \[pg:0103\]](#) you want to appear on the list. Check *all* of the Roles if you want to see all volunteers who have the Assignment (or an Assignment that falls under the Site or Place) regardless of their Role in the assignment.

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## How to Send Messages to the Volunteers Scheduled on a Certain Day

Help topic 2192

Added or revised 10-28-2015


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It's easy to send [email \[pg:0404\]](#), [Vic mail \[pg:0315\]](#), or [text messages \[pg:0343\]](#) to all of the volunteers who are scheduled on a specific date.


1. To send messages to everyone scheduled on a specific date in any assignment, choose "Schedule" from the [menu \[pg:0215\]](#). Otherwise select "Assignments" from the [menu \[pg:0215\]](#), select the Site, Place, or Assignment for which you want to send messages to the volunteers scheduled on a specific date, and then click the "Schedule" tab.
2. If the schedule is not already in the Daily view, click the **Daily Schedule** button.



---

# Schedule

Daily schedule 

June 2014

 [Printable View](#)

Sun	Mo
1	2
 10:00 - 10:00	

- Use the date dropdown lists and the **Go** button to move to the date you want.
- Click the Messages link near the top of the schedule.



- Use the "New message" window to compose and send your message.

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## How to Send Messages to all of a Coordinator's Volunteers

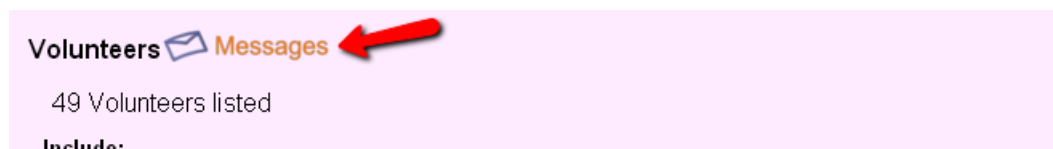
Help topic 2193

Added or revised 10-28-2015

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It's easy to send [email \[pg:0404\]](#), [Vic mail \[pg:0315\]](#), or [text messages \[pg:0343\]](#) to all of a [Coordinator's \[pg:0163\]](#) volunteers. Here is how you can do this:

- Select Coordinators from the [menu \[pg:0215\]](#).
- Choose a Coordinator.
- Select the Volunteers tab in the selected Coordinator's record.
- Set the criteria for which records you want to have shown and click the **Search** button. If you need help with how to set the criteria, please see the *Search Criteria* box below.
- Click the *Messages* icon at the top of the list.



- Compose your message and send it out. If you need assistance with composing your message, please see [help topic 2195 \[pg:0404\]](#).

### Search Criteria

#### Status

Check each of the volunteer [Statuses \[pg:1832\]](#) you want to appear on the list. Check *all* of the Statuses if you want to see all volunteers who have an assignment the Coordinator oversees regardless of their Status.

## Role

Check each of the assignment [Roles \[pg:0103\]](#) you want to appear on the list. Check *all* of the Roles if you want to see all volunteers who have an assignment the Coordinator oversees regardless of their Role in the assignment.

---

## How to Send Messages to the Tagged Volunteers

Help topic 2194

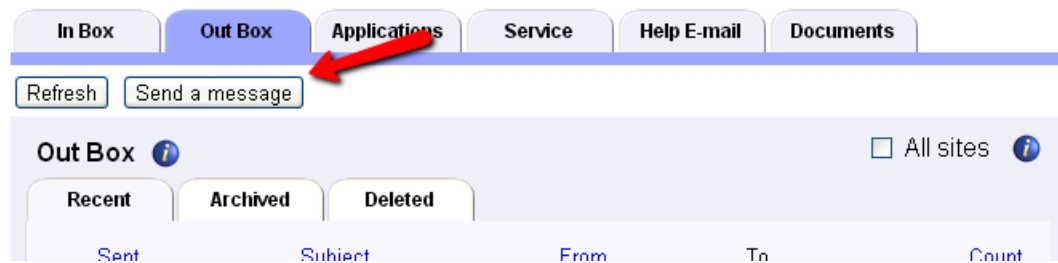
Added or revised 10-28-2015

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It's easy to send messages to all of the volunteers whose records you have tagged.

1. Start by [tagging the volunteer records \[pg:1538\]](#) of the volunteers you want to send email to.
2. Once you've tagged the records of the volunteers you want to send your message to, select *Mailbox* from the [menu \[pg:0215\]](#).
3. Select the *Out Box* tab.
4. Click the **Send a message** button. This opens the *New message* window.

### Mailbox



5. On the *New message* window, check the *Tagged volunteers* checkbox.

**New message**

Send this message by:

Email  
 VIC mail  
 Text Message

From: Jennifer Jones (jjones@volgistics.com)

To: Volunteers

Tagged volunteers ( 17)

All  volunteers

All of the volunteers in this Set:

All volunteers

6. Finish composing your message. Refer to the following help topics for more details on composing and sending each type of message:

- Email Messages - [Help topic 2195 \[pg:0404\]](#)
- Text Messages - [Help topic 1295 \[pg:0343\]](#)
- Vic Mail Messages - [Help topic 1127 \[pg:0315\]](#)

You can also send messages to different groups of volunteers *without* using tags. The following help topics show ways to send messages to groups of volunteers without using tags to identify the volunteers first.

- You can send messages to all of the volunteers who have a specific Assignment, or who have an Assignment at a specific Site or Place without using tags. Read [How to Send Messages to the Volunteers in a Specific Site, Place or Assignment \[pg:0399\]](#) to learn how.
- You can send messages to all of the volunteers scheduled on a certain day without using tags. Read [How to Send Messages to the Volunteers Scheduled on a Certain Day \[pg:0401\]](#) to learn how.
- You can send messages to all of a [Coordinator's \[pg:0163\]](#) volunteers without using tags. Read [How to Send Messages to all of a Coordinator's Volunteers \[pg:0402\]](#) to learn how.
- You can send messages to all of the volunteers in a [Set \[pg:0858\]](#) without using a tags. To learn how read [How to Send Messages to the Volunteers in a Set \[pg:0396\]](#)

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## How to send an email message

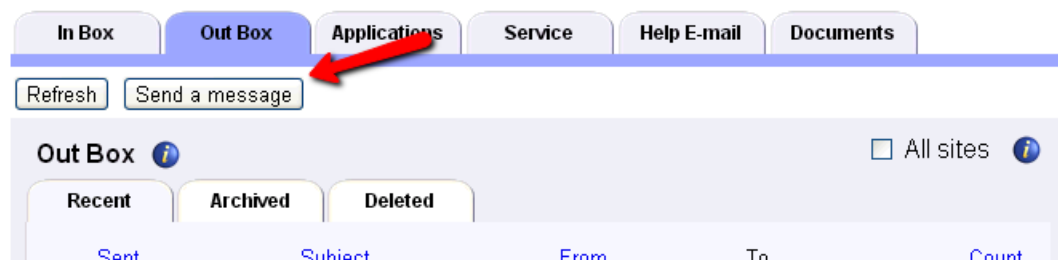
Help topic 2195

Added or revised 10-08-2013

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This topic explains how to compose and send a new email message to volunteers and or coordinators from the Volgistics Mailbox. If you're not already on the "New Message" window you can get there by selecting "Mailbox" from the [menu \[pg:0215\]](#), clicking the "Out Box" tab, and then clicking the **Send a message** button.

## Mailbox



### 1. Use the *Send this message by* option to select how you'd like your message sent.

Send this message by:

Email

VIC mail

Check the "Email" checkbox if you want to send this message by Email. When this option is checked, it enables the HTML formatting options so you can use features such as different fonts, text colors, pictures and tables in your messages. [Help topic 1026 \[pg:0295\]](#) explains more.

Check the "VIC mail" checkbox if you want volunteers to receive this message when they visit VicNet or VicTouch. [Help topic 1127 \[pg:0315\]](#) explains more about this option.

You may check both checkboxes (Email and Vic Mail) if you want volunteers to receive this message both by email, and at VicNet or VicTouch.

### 2. Change the *Reply-to* address if necessary.

Messages are always from you (the name entered for you on your Volgistics System Operator record). While you cannot change who the message is from, you can change the email address that will appear as the reply-to email address in your message in the "Reply to" field. This field only appears if you selected to send your message via Email in step 1.

If an email address has been entered in the "Reply-to" field on your [System Operator setup page \[pg:1895\]](#), this reply-to email address will appear here by default. You can change the default reply-to address on the System Operator setup page if you want the default address to automatically be populated with a different address. If no address is entered in the "Reply-to" field on your System Operator setup page, the address entered when you send an email is the "Email address" field from your System Operator setup page.

See [Help topic 2190 \[pg:0398\]](#) for more information on updating reply-to fields in Volgistics.

*Please only enter one address in this field.*

### 3. Choose who will receive your message.

Use the "To" section to specify which volunteers and/or Coordinators this message should be sent to.

To: Volunteers

Tagged volunteers ( 54)

All  volunteers

All of the volunteers in this Set:

All volunteers

Coordinators

All coordinators (7)

To send your message to an individual volunteer, select the volunteer's name from the volunteers drop-down list.

To send your message to all of the tagged volunteers, check the "Tagged volunteers" checkbox. See [Help topic 2194 \[pg:0403\]](#) if you need more help with this.

To send your message to all volunteers with a specific Status (such as all active volunteers), select the Status of the volunteers you want to send the message to.

Check "All of the volunteers in this Set" and then choose a [Set \[pg:0396\]](#) to send your message to all of the volunteers in a specific set.

To send your message to every volunteer in your database (except archived volunteers) no matter what their Status is, check the "All volunteers" checkbox.

To send your message to an individual Coordinator, select the coordinator's name from the Coordinators drop-down list.

Check the "All coordinators" checkbox to send your message to all Coordinators.

**Please note:** You can also combine checkboxes to send an email to more than one group. For example, if you needed to send a message to all volunteers with the Applicant Status plus just one volunteer with the Active Status, you could use the Status dropdown and select the Applicant Status and then select the one volunteer's name from the individual option.

#### 4. Choose a Format for your message if necessary.

If you selected to send your message by email in step 1, you will see an option to select a format for your message. By default, the *HTML* option is selected because this will allow more enhancements for how the content of your message appears. With the HTML option, a plain text version of your message is automatically included. Step 11 has more information on why both are included. If you only want the message to be sent with a plain text version, you can do this by selecting the *Plain text* option.

#### 5. Choose an Email type for your message if necessary.

If you selected to send your message by email in step 1 and have more than one volunteer selected to receive the message in step 3 you must choose an email type. Use the drop-down list to choose the email type that represents the kind of email message you're sending.

Email types are part of [email preference features \[pg:0381\]](#). This email message will not be sent to volunteers who have elected *not* to receive email of the type you choose here. You can define new email types in [Setup \[pg:1321\]](#). The first email type listed for your account in Setup will appear as the default selection.

#### **6. Enter a Cc address if you'd like.**

If you're sending an email message the Cc field appears. Use this field if you want to "carbon copy" (send a copy of the message to) another email recipient. Leave this field blank, or enter a valid email address here.

*Please only enter one address in this field.*

#### **7. Enter a Subject for your message.**

To send a message, you must enter a subject for your message. This field cannot be left blank. Whatever is entered here will appear as the subject of your email message.

#### **8. Add an Attachment to your message if necessary.**

You can optionally attach a [PDF \[pg:0449\]](#) or Microsoft Word document (DOC or DOCX) file to your email message. If you've previously uploaded the PDF file you want to attach, choose it from the Attachment drop-down list. If you have not yet uploaded the file you want to attach you should close the New Message window and [upload the file \[pg:0368\]](#) first. The system currently only allows one attachment per message.

#### **9. Compose your Message.**

Enter your message in the message text area. If your message is long, consider writing it in a word processor, and then [pasting \[pg:0063\]](#) it in the Message field. If you choose to send the message by Email in step 1, you will enter your message in HTML format. If you need help with any of the HTML options, please see [Help topic 1024 \[pg:0278\]](#).

The default font, font size and font color for your HTML message is controlled by your settings on the [Email Ground Rules \[pg:1930\]](#) page. These settings will also be applied to your signature block (if one is included). To add, or change, the signature block for your System Operator record, you will need to go to the [System Operator \[pg:1895\]](#) page and update the information under the Email heading.

You can also personalize your email messages with each volunteer's information by using special codes. You can find information on how to do this in [Help Topic 2103 \[pg:0386\]](#).

#### **Spell Checking**

Because most web browsers have spell check features, or have the ability to add one with a toolbar option, there is not a built-in spell check feature in the Message window. If you need information on using or adding spell check to your browser, please see [Help topic 2318 \[pg:1624\]](#). To check for spelling options for a word identified by your spell check in HTML messages, hold down the Control (CTRL) or Command (CMD) key on your keyboard then right- click on the identified word.

#### **10. Preview your message if it's in HTML format.**

Before you send an HTML Email message, it is a good idea to preview it first by clicking **Preview** button in the HTML Editor. This causes the document to open in a new browser window so you can see how the message will look without the HTML Editor's toolbar and window. Keep in mind that things such as the width of the viewer's window will depend on things such as the email program they use and the size of their monitor. You can return to the Editor after previewing the message and make any changes you'd like.



The majority of the time, recipients of your message will receive the email exactly as you intended it to appear, or very close. However, there may be cases where the message does not appear correctly when the recipient opens it. This is because there is not a standard protocol in place that every email provider follows to interpret HTML email messages. This means that different email providers may display the same message differently. [Help topic 1028 \[pg:0299\]](#) has more information on this.

## 11. Preview your *Text version* if your message is in HTML format.

When sending a message in HTML format, it is still important to include a plain text version of your message. This allows recipients whose email programs might not support HTML formatting, or have the HTML formatting turned off, to still be able to receive and read the message. Also, recipients who receive the message on some smart phones may not be able to view it if a plain text version is not sent.

Please keep in mind that if you selected to send your message by both Email and Vic Mail in step 1, recipients will view the plain text version of the message when they read it at VicNet or VicTouch.

The *Text version* field is automatically populated with the message's content when the **Insert text** button is clicked. Or, if you forget to do this, it will automatically be populated when you send the message. We recommend clicking the button because it may be necessary to edit the plain text version so it appears properly. For example, things such as spacing between paragraphs and the numbers in numbered lists may not transfer correctly to the plain text version.

## 12. Send or save your message.

Click the **Send now** button to send your message right away. If you want to save your message and send it later, click the **Save to send later** button. This option also allows you to save a draft copy of a message you're working on so you can complete it later.

To return to, or send, a message you've saved:

1. Choose "Mailbox" from the [menu \[pg:0215\]](#).
2. Select the "Out Box" tab.
3. Click the subject line of the message you saved.
4. When you're ready to send the message, click the **Send now** button

### Related help

- [Help Topic 1991 \[pg:0362\]](#) - Mailbox Out Box Tab
- [Help Topic 2062 \[pg:0368\]](#) - Including email attachments
- [Help Topic 2100 \[pg:0381\]](#) - Introduction to email preferences
- [Help Topic 2191 \[pg:0399\]](#) - How to Send Messages to Volunteers in a Specific Site, Place or Assignment
- [Help Topic 2192 \[pg:0401\]](#) - How to Send Messages to the Volunteers Scheduled on a Certain Day
- [Help Topic 2193 \[pg:0402\]](#) - How to Send Messages to all of a Coordinator's Volunteers
- [Help Topic 2194 \[pg:0403\]](#) - How to Send Messages to all of the Tagged Volunteers
- [Help Topic 2185 \[pg:0396\]](#) - How to Send Messages to the Volunteers in a Set
- [Help Topic 2064 \[pg:0370\]](#) - Tracking messages you have sent
- [Help Topic 1094 \[pg:0301\]](#) - How long does it take for email to be delivered?
- [Help Topic 2065 \[pg:0377\]](#) - Email address validity
- [Help Topic 2046 \[pg:0366\]](#) - Make Sure Volunteers & Coordinators Receive Your Email
- [Help Topic 2073 \[pg:0380\]](#) - Is it possible to "recall" a message I sent?
- [Help Topic 2103 \[pg:0386\]](#) - How can I personalize email messages with the volunteer's information?
- [Help Topic 2190 \[pg:0398\]](#) - How to Update Reply-to Fields for Email Messages

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## Schedule Reminder Message Preference

Help topic 2274

Added or revised 08-18-2014

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Volgistics provides volunteer and [Coordinator \[pg:0163\]](#) message preference features needed to ensure the integrity of automatic and mass email and text messages you send. These features enable volunteers and Coordinators to opt-in or opt-out of different types of automatic or mass email and text messages your organization may send. They can also opt-out of messaging entirely if they choose. You can learn more about these message preference features in [help topic 2100 \[pg:0381\]](#).

The reason Volgistics requires message preferences to be used is because Internet Service Providers (ISP) and cell phone companies often blacklist organizations as spammers if mass messages are sent without opt-out features. This would mean that your email or text messages would not be delivered by the ISP or cell phone company.

If you use Volgistics to send [automatic schedule reminders \[pg:0791\]](#), schedule reminder emails or text messages are sent to volunteers and Coordinators, as long as they have not opted-out of the schedule reminder type of message.

To determine if a volunteer has opted to receive, or not receive, schedule reminder messages:

1. Choose *Volunteers* from the [menu \[pg:0215\]](#).
2. Locate the volunteer's record.
3. Click on the *Profile* tab for the selected volunteer.

If the volunteer has not [opted-in to text messaging \[pg:0323\]](#), a *Message Preferences* box will show on the Profile tab. If the box beside

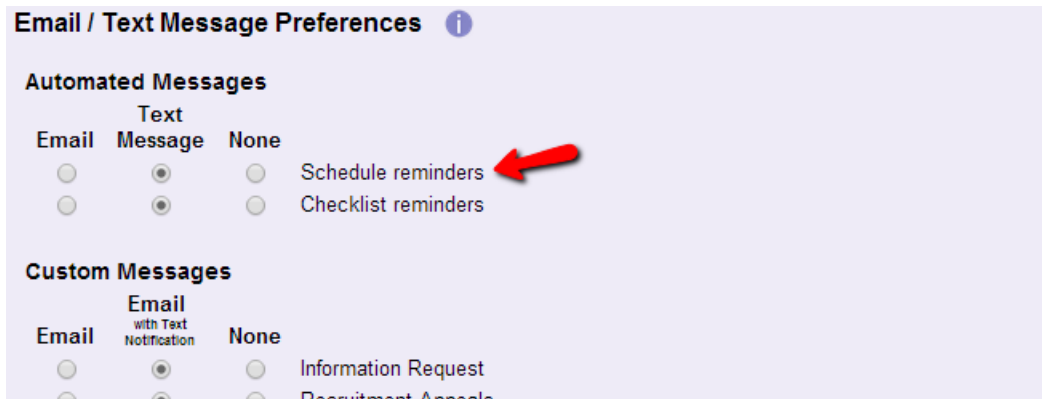
### *Schedule reminders*

is checked, they will receive the schedule reminder messages by email as long as they have a [valid email address \[pg:0377\]](#) recorded on their record.

<input checked="" type="checkbox"/> Schedule reminders	<input checked="" type="checkbox"/> Checklist reminders
<input checked="" type="checkbox"/> Information Request	<input checked="" type="checkbox"/> Recruitment Appeals
<input type="checkbox"/> Electronic Newsletter	<input checked="" type="checkbox"/> Training Announcement
<input type="checkbox"/> Team Leader Updates	<input type="checkbox"/> Fund Raising Information

If the volunteer has [opted-in to text messaging \[pg:0323\]](#), an *Email/Text Message Preferences* box will show on the Profile tab. If

*Email* is selected, the volunteer will receive schedule reminder messages by email as long as they have a [valid email address \[pg:0377\]](#) recorded on their record. If *None* is selected, the volunteer has expressed that he or she does not wish to receive this type of message so no schedule reminders will be sent to them. If *Text Message* is selected, the volunteer will receive schedule reminders by text message as long as they have a [valid mobile phone number \[pg:0333\]](#) recorded on their record.



### Note:

If you do not see a

*Schedule reminders*

message type listed in the

*Message Preferences* or *Email/Text Message Preferences* boxes, then you do not have the [Schedule reminder \[pg:0791\]](#) feature setup for your account.

### How to reset schedule reminder email preferences

You can optionally reset the *Schedule reminders* message preference for all volunteers and [Coordinators \[pg:0163\]](#) so they either receive the message by email or are opted-out of receiving the message type.

Regulations do not allow you to set everyone to receive messages by text because in some cases recipients are charged by their cell phone carrier when they receive text message.

To reset all schedule reminder message preferences:

1. Select [Setup \[pg:0887\]](#) from the menu.
2. Expand the *Messages* link.
3. Select *Message types*.
4. Scroll down to the *Types of automatic messages* box and find the Reset section for the *Schedule reminders* type of email message.
5. Select *everyone* from the first dropdown.
6. If you want to have everyone receive *Schedule reminders* by email, select *email* from the second dropdown. If you want to opt everyone out from receiving *Schedule reminders*, select *none* from the second dropdown.
7. Click the **Update** button.

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## Schedule Preferences versus Assignment Preferences

Help topic 1186

Added or revised 01-18-2017

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Both [Assignment Preference \[pg:1351\]](#) and [Schedule Preference \[pg:1343\]](#) fields can be included on an online volunteer application form. In some instances it is more appropriate to include Assignment Preferences, while in other situations it may be more suitable to collect Schedule Preferences on the application form. This help topic differentiates between Assignment Preferences and Schedule Preferences, so that an organization can determine which (if any) they would like to use on their application forms.

### Assignment Preferences

Including [Assignment preference \[pg:1351\]](#) fields on the application allows applicants to indicate which Assignments they would like to participate in. This is appropriate when applicants should have some input as to what they will be doing in an organization, but when either (a) an organization does not use [schedule openings \[pg:0776\]](#) to schedule volunteers, or (b) applicants do not participate in deciding when they will serve.

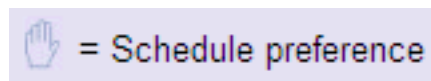
When volunteers indicate an Assignment Preference on the application, the Assignment is automatically added to their [Service tab \[pg:0138\]](#) - with the [Role \[pg:0103\]](#) of "Preference" - when their application is received.

Facilities [North\Maintenance]	Preference	12-05-2007	<a href="#">Edit</a>	<a href="#">Delete</a>
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In order for a volunteer to have the Role of "Assigned" in the Assignment, a [System Operator \[pg:0065\]](#) must manually edit their Role, or confirm that [automatic Assignment recording \[pg:0906\]](#) is turned on. In this case, they will also need to make sure that the volunteer has a [service entry \[pg:1581\]](#) in that Assignment, or is scheduled to serve in that Assignment.

### Schedule Preferences

Alternatively, [Schedule Preferences \[pg:1343\]](#) are useful when you want volunteers to indicate specific dates and times they would like to serve by choosing their preference of [schedule openings \[pg:0776\]](#). Schedule Preferences can only be included on an application form when schedule openings have been created, whereas Assignment Preferences can be collected even if you have not created any openings. Schedule Preferences can be setup so they are automatically received as actual schedule entries, or as preferences where they are not automatically added to the actual schedule when an application is received. In the latter case, the applicant's selections are displayed with the raised hand icon.



When choices are received as preferences, a [System Operator \[pg:0065\]](#) must [manually approve \[pg:0773\]](#) the preference before it officially becomes part of the schedule.

If you include Schedule Preferences on your application form, you can increase applicants' understanding of your organization's Assignments by checking the "Display assignment names as links to assignment profiles" checkbox on your [Application Form Setup page \[pg:1334\]](#). This makes the Assignment names on your application form appear as links to the Assignment profile for each Assignment, giving visitors to your form a way to learn more about each Assignment as they examine the application form.

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# How to Schedule Volunteers for Orientation When They Apply

Help topic 1218

Added or revised 01-17-2017

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Many organizations have volunteer orientations on a regular basis as part of their process for on boarding new applicants. If your organization is one of these, you may want to collect a schedule for the orientation as the applicants apply. This help topic shows you how to do this.

Confirm password:

**Orientation**  
You will be required to attend an orientation session in order to start volunteering with us. We hold evening orientations on the second Tuesday of the month and daytime orientations on the second Thursday of the month. Please select which session you will attend below.

	Times	Assignment
Thursday, Feb 9, 2017:	<input type="radio"/> 9:30 a to 11:00 a	<a href="#">Orientation</a>
Tuesday, Feb 14, 2017:	<input type="radio"/> 7:00 p to 9:30 p	<a href="#">Orientation</a>
Thursday, Mar 9, 2017:	<input type="radio"/> 9:30 a to 11:00 a	<a href="#">Orientation</a>
Tuesday, Mar 14, 2017:	<input type="radio"/> 7:00 p to 9:30 p	<a href="#">Orientation</a>

**I Agree**  
I understand and agree that submitting this application form does not automatically register me as a Your Agency Name

## 1. Create an Assignment for the Orientation

If you have not already created an assignment record for your orientation, you will need to do this first. You can find directions and a video on how to make an assignment record in help topic 2215 "[Add an Assignment](#)" [[pg:0106](#)].

## 2. Add an Opening to Show When Orientations Will Be Held

Once you have an assignment record for the orientation, add an opening to it to make a schedule of when orientation sessions will be held. You can setup the opening to repeat in a pattern such as the second Thursday of each month or every Saturday. You can also add a limit to the opening for the maximum number of people who can attend. For example, if your classroom will only hold 20 people you can create 20 opening slots. You can learn how to make openings in help topic 2158 "[How do I add schedule openings?](#)" [[pg:0776](#)]

## 3. Create a Form Section for the Orientation

If you want to have the orientation information in its own section of the application form, you will need to create this section. The form section can be customized with directions about what you want the applicant to do. You can learn how to make a new form section in help topic 1055 "[Form Sections.](#)" [[pg:1340](#)]

## 4. Add the Opening Dates and Times

The final step is to link the openings for the orientation assignment with a form section. You can find the steps to take to do this in help topic 1057 "[Schedule Fields.](#)" [[pg:1343](#)]

Some things to keep in mind when you setup the form with the orientation's schedule are:

- Choosing an option for the dates openings show that automatically refreshes (such as the next 30 days or the next 60 days) will mean less work for you than choosing a specific date range that you will need to sign-in and update.
- Restricting the applicant to one choice of date and time will be less work than allowing them to choose multiple dates and times or allowing them to rank their choices.
- Receiving the selections as actual schedule entries means the system will update the number of opening slots available as soon as you [receive the application \[pg:0415\]](#) into your database. Receiving the selections as preferences means you will need to [approve the selections \[pg:0773\]](#) before the number of available opening slots will update.

### Remind Applicants of Their Upcoming Orientation

The process outlined in this help topic will allow you to schedule applicants for an orientation when they apply. Because a number of days may pass between when an application is submitted and the scheduled orientation, it may be useful to setup Volgistics to send an automatic reminder about the upcoming orientation. Help topic 2273 "[Schedule Reminders](#)" [\[pg:0791\]](#) shows how to do this.

Please keep in mind that if you use reminders for other assignments than orientation, you should keep the content of the message generic enough to apply to the applicants as well as the established volunteers.

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## Using Online Volunteer Application Forms

Help topic 2121

Added or revised 01-18-2017

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With Volgistics you can collect information from prospective volunteers using online volunteer application forms, and then immediately use that information in your database without having to enter it manually.

Here's how online application forms work:

- You start by [setting up \[pg:1361\]](#) an application form in the settings area (or you can start with one of the default application forms that came with your Volgistics account). This is where you specify what information you want to collect through your form, and how the form is organized.
- You [add a link \[pg:1362\]](#) to your application form wherever you want it to appear on your own web site. Now you're ready to start receiving applications!
- Prospective volunteers complete your form online, and submit it. Volgistics checks to be sure applicants provide all of the information you require, and that things like zip or post codes were entered in a proper format.

- Once an applicant submits their form, Volgistics can automatically [send them a confirmation email \[pg:1349\]](#) to let them know you've received their information and explain what happens next.
- Submitted volunteer application forms appear right away in your Volgistics Mailbox for [screening \[pg:0415\]](#). Forms you choose to receive become new volunteer records in your database. From here you perform whatever additional processing is appropriate for new applicants.
- Volgistics automatically saves a [PDF copy of the completed application form \[pg:1373\]](#) on the volunteer's record. .

You may create more than one online volunteer application form in Volgistics. This flexibility is important for:

- Organizations that use the [Site Level Access \[pg:0092\]](#) feature and want to have a [different application form for each of their Sites \[pg:0419\]](#).
- Organizations that manage special events can create application forms for each event.
- Having different application forms for different types of volunteers, such as 'Juniors' and 'Adults.'
- Having a comprehensive 'application form' for ongoing volunteers; and a separate short 'registration form' for registering one-time volunteers for special events.

When you create multiple application forms, you can [add links \[pg:1362\]](#) to your various forms from different locations on your web site or from different web sites altogether. For example, you might have a permanent web page for recruiting regular ongoing volunteers from which you link your comprehensive 'volunteer application form,' plus a separate web page promoting a one-time event from which you have a link to a short 'volunteer registration form' used to sign-up one-time volunteers for that event.

Visit these additional topics for more information about setting-up and using online volunteer application forms:

- [Help Topic 1053 \[pg:1334\]](#) - Application Form Setup Page
- [Help Topic 1054 \[pg:1338\]](#) - Site Selection
- [Help Topic 1055 \[pg:1340\]](#) - Form Sections
- [Help Topic 1056 \[pg:1341\]](#) - Volunteer Application Form Fields
- [Help Topic 1057 \[pg:1343\]](#) - Schedule Fields
- [Help Topic 1058 \[pg:1345\]](#) - Comment Fields
- [Help Topic 1059 \[pg:1346\]](#) - Contact Fields on Application Forms
- [Help Topic 1060 \[pg:1348\]](#) - I Agree Section
- [Help Topic 1061 \[pg:1349\]](#) - Receipt Confirmation
- [Help Topic 1165 \[pg:1351\]](#) - How do I collect Assignment Preferences on an application form?
- [Help Topic 1186 \[pg:0411\]](#) - Schedule Preferences versus Assignment Preferences
- [Help Topic 1187 \[pg:1353\]](#) - How to Upload Logo Graphics
- [Help Topic 1191 \[pg:1357\]](#) - How do I disable an online application form?
- [Help Topic 1218 \[pg:0412\]](#) - How to Schedule Volunteers for Orientation When They Apply
- [Help Topic 2055 \[pg:0967\]](#) - How do I make only certain Assignments appear under Assignment Preferences?
- [Help Topic 2122 \[pg:1361\]](#) - How to Set Up a Volunteer Application Form
- [Help Topic 2123 \[pg:0415\]](#) - Processing Online Volunteer Applications
- [Help Topic 2124 \[pg:0418\]](#) - Where the Information from Application Forms Goes
- [Help Topic 2125 \[pg:1362\]](#) - Creating Links to Your Volunteer Application Form
- [Help Topic 2127 \[pg:0419\]](#) - Site Level Access and Online Volunteer Application Forms
- [Help Topic 2128 \[pg:0420\]](#) - Volunteer Policy, Confidentiality and Release Agreements
- [Help Topic 2129 \[pg:1365\]](#) - Online Form Security and Privacy Policies
- [Help Topic 2130 \[pg:1011\]](#) - Preference Fields

[Help Topic 2131 \[pg:1367\]](#) - How to Clone a Volunteer Application Form

[Help Topic 2552 \[pg:1373\]](#) - How to Print, View, or Save a Completed Application Form

[Help Topic 2554 \[pg:1375\]](#) - How to Print a Blank Volunteer Application Form

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## Processing Online Volunteer Applications

Help topic 2123

Added or revised 01-18-2017

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This help topic shows how to receive [volunteer application forms \[pg:0413\]](#) into your database of volunteer records. Click on a link in the Content window below to be taken directly to that section of the help topic.

### Content

[Clear Tagged Records for Your Session](#)

[Go to the Applications Tab](#)

[Receive New Applications](#)

[Delete New Applications](#)

[Print, View, or Save a Completed Application Form](#)

### Clear Tagged Records for Your Session

A [Tag \[pg:1529\]](#) is a temporary way to identify a record, or group of records, during your Volgistics session. Records created by receiving applications are automatically tagged so they are easy to identify. Because tags are cumulative during your session, it is important to clear any tagged records you may have for your session before you receive applications. This will ensure that you are not including previously tagged records when you work with the new records. With the Tags feature, you can work with all of the applicant records you receive to do things such as [send a VicNet password link \[pg:2013\]](#) or any of the other tasks described in [help topic 2137 \[pg:1999\]](#).

To clear the tagged records:

1. Choose *Tags* from the [menu \[pg:0215\]](#).
2. Click the **Clear all tags** button.

*If the **Clear all tags** button is grayed out, no records are currently tagged.*

### Go to the Applications Tab

Once a prospective volunteer submits an online application form, it appears as a pending application on the Applications tab of your Volgistics mailbox as long as the form is not setup to bypass auditing. From the Applications tab, you can choose to either

*receive*

or

*delete*

individual applications. This step gives you a chance to screen out applications you know to be duplicates or phony before they make it into your database. If your forms are setup to bypass auditing, the applicant's information creates a new record in your database without being held on the Applications tab first. In this case, you can find the record as shown in [help topic 2023 \[pg:1982\]](#).



To check for new online applications:

1. Choose *Mailbox* from the [menu \[pg:0215\]](#).
2. Select the *Applications* tab.

The Applications tab has columns for Name, Street, City, Application (the form's internal name), Posted (the date the application was received) and [Type \[pg:0212\]](#). These will display information about the application the volunteer submitted. You can click on the headings above each column to change the sort order. For example, click on the *Posted* column heading once to sort the pending applications in descending order of date and time received. Click the same column heading again to reverse the sort order.

*There is not a way to see complete information from the potential volunteer's application at this point because there is not a volunteer record yet.*

### **Receive New Applications**

When you *receive* a new application form on the Applications tab, Volgistics inserts a new volunteer record into your database where you can view its contents and begin working with it. To receive new application forms, you will need to be on the Applications tab of the Volgistics mailbox. If you are not already on this tab, see the Go to the Applications Tab section above.

To receive applications:

1. Place a checkmark in the checkbox that appears next to the applicant's name for the record you want to receive. You can click the **Check all** button at the bottom of the tab if you want to *receive* all of the pending application forms.
2. Click the **Receive** button at the bottom of the tab.

When you click the

### **Receive**

button, Volgistics inserts a new volunteer record for each application form you checked. This new record contains all of the information the prospective volunteer entered on the form. If you need help locating submitted information in the new records, please see [help topic 2124 \[pg:0418\]](#).

If you receive more than one new application at a time, you may want to use the Volgistics [Tag \[pg:1529\]](#) features to perform [additional processing \[pg:1999\]](#) on the newly received applicant records. For instance, if you routinely send a welcome email, simply send the [email to all of the tagged records \[pg:0403\]](#) right after you receive new applications.

Note that

*receiving*

an online volunteer application form in Volgistics does not necessarily mean that your organization has

*accepted*

the applicant as a new volunteer. Once you receive the application you should proceed with any screening or processing appropriate to your organization or the kind of assignment the applicant has applied for. Generally, we recommend having the application forms set to give new volunteers the [Status \[pg:1832\]](#) of *Applicant*.

Organizations typically change the volunteer's Status from *Applicant* to *Active* (or some other Status) only after the applicant completes the appropriate screening, qualifications, or training.

Your Volgistics account's **service level** [pg:0719] sets the maximum number of volunteer records you can manage in your database. Each new application you

*receive*

through the Applications tab becomes one new volunteer record, so you can only

*receive*

as many applications as you have space for in your account. Volgistics will alert you on the Applications tab if you're short on space. If you find that you have more pending applications than you have space for, alert your organization's **Volgistics Administrator** [pg:0052]. They can make more space available by **deleting** [pg:2016] or **archiving** [pg:1819] other volunteer records, or increasing your organization's service level to provide space for tracking more volunteers.

### **Delete New Applications**

If you choose to *delete* an application form rather than *receive* it, Volgistics deletes the application and any information that may have been entered on it.

The Internet is a public place, so you may occasionally receive bogus or phony form submissions with blank names or address fields, or irregular name and address entries such as "ZZZZZZZZZ" or "asdkjfhjkasdfhliweuh." The *Delete* option exists so you can dispose of phony form submissions rather than clutter your database with them. Of course it's up to you to determine if a pending application is phony or not. If you can't judge for sure from the information displayed on the Applications tab, you can always *receive* the application, view the rest of the submitted information, and then delete the record if it turns out to be bogus. There is not any danger of contracting a computer virus or damaging your Volgistics database by *receiving* applications from the Applications tab into your Volgistics mailbox.

*When you delete an application from the Applications tab, there is not a way to restore the deleted information. Please use caution when choosing to delete. Be sure you're deleting only the applications you intend to.*

To delete one application:

1. Click the Delete link on the right side of the row that has the applicant information.
2. Click the **OK** button in the pop-up confirmation window. If you do not wish to delete the application, click the **Cancel** button.

To delete multiple applications:

1. Place a checkmark in the checkbox that appears next to the applicant's name for the record you want to delete. You can click the **Check all** button at the bottom of the tab if you want to *delete* all of the pending application forms.
2. Click the **Delete** button at the bottom of the tab.
3. Click the **OK** button in the pop-up confirmation window. If you do not wish to delete the applications, click the **Cancel** button.

## Print, View, or Save a Completed Application Form

With the release of Phase 2 of the VicDocs feature, Volgistics automatically saves a PDF [pg:0449] file of the completed application form a volunteer submits. For applications submitted prior to the release of Phase 2, you can run a report with the same fields of information as your application form has. This will allow you to see the content of these fields now. **Please Note:** *The content of the fields may have changed since the application was submitted so only the PDF will reliably show what the applicant selected on the application when he or she applied.*

You can learn how to print, view, or save a completed application form in [help topic 2552 \[pg:1373\]](#).

### Related help

[Help Topic 1056 \[pg:1341\]](#) - Volunteer Application Form Fields

[Help Topic 1165 \[pg:1351\]](#) - How do I collect Assignment Preferences on an application form?

[Help Topic 1186 \[pg:0411\]](#) - Schedule Preferences versus Assignment Preferences

[Help Topic 1191 \[pg:1357\]](#) - How do I disable an online application form?

[Help Topic 1218 \[pg:0412\]](#) - How to Schedule Volunteers for Orientation When They Apply

[Help Topic 2055 \[pg:0967\]](#) - How do I make only certain Assignments appear under Assignment Preferences?

[Help Topic 2121 \[pg:0413\]](#) - Using Online Volunteer Application Forms

[Help Topic 2124 \[pg:0418\]](#) - Where the Information from Application Forms Goes

[Help Topic 2127 \[pg:0419\]](#) - Site Level Access and Online Volunteer Application Forms

[Help Topic 2552 \[pg:1373\]](#) - How to Print, View or Save a Completed Application Form

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## Where the Information from Application Forms Goes

Help topic 2124

Added or revised 01-18-2017

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Once you receive a new [online volunteer application form \[pg:0413\]](#) you're ready to begin working in the new applicant's volunteer record. This help topic explains where to find the various pieces of information you collected on the application form.

Keep in mind that when you view a new applicant's information in your Volgistics database, you're viewing it through a 'volunteer record' rather than through the application form itself. The information is the same as when the applicant entered it, but now it's organized into a standard volunteer record so you can begin tracking the applicant as you do all your other volunteers.

In other words, online visitors to your web site probably see your online application form as a series of fields and/or questions on a single web page, presented in a way that (we hope) makes it easy for them to understand what information you want them to enter. But when *you* look at their submitted information you see it in the form of a standard volunteer record, organized on the [usual tabs \[pg:1849\]](#) (Core tab, Profile tab, Schedule tab, etc.). This might sound a bit complicated, but it's really quite straight forward. Here's how it works:

**This kind of information on the application form.....appears on this tab in the volunteer's record**Core tab fieldsCore tabProfile tab fieldsProfile tabSchedule fieldsSchedule tabComment fieldsNotes tabContact fields (e.g. Emergency contact, Employer, Parent, References, etc).Contact tab

---

## Site Level Access and Online Volunteer Application Forms

Help topic 2127

Added or revised 01-07-2015

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If you use the [Site Level Access \[pg:0092\]](#) feature it's important to understand the additional settings you have for [volunteer application forms \[pg:0413\]](#), and how to control which Sites receive submitted application forms. This help topic explains a bit more about what happens with online application forms when Site Level Access is turned on. Once you have read this help topic, go to the [Site Selection setup page \[pg:1338\]](#) to choose whether applicants do not select a Site and all applications are sent to headquarters; an application is always for a specific Site; or if an applicant's Site is determined by their choice of certain Preference fields.

If you choose "Determine applicant's Site(s) based on their choice of...", on the [Site Selection \[pg:1338\]](#) settings for an application form, the Site that will receive applications submitted through the form will be determined by the applicant's [Assignment Preference \[pg:0991\]](#). For example, consider an application form that offers applicants a choice of these three Assignments:

Trail maintenance (North Site)  
Arborist (South Site)  
Tour guide (Central Site)

If an applicant chooses "Arborist" as their Assignment Preference, the "South Site" will receive the application, since the "Arborist" Assignment is located at the "South Site."

If you allow applicants to choose [more than one Assignment Preference \[pg:0991\]](#), multiple Sites will receive the application if an applicant prefers Assignments in more than one Site. Consider the example Assignments shown above: If an applicant chooses both "Trail maintenance" and "Tour guide" as their Assignment Preferences, both the "North Site" and the "Central Site" will receive the application, since these two Sites both have one of the Assignments selected by the applicant.

Sites not selected by the applicant do not receive the application form.

If any of the Sites that get the application form [receive \[pg:0415\]](#) or [delete \[pg:0415\]](#) it from their mailbox, it still appears in the other receiving Site's mailboxes until they choose to *receive* or *delete* the application themselves. This gives every Site that got the form an opportunity to see the new application and process it in a manner appropriate to their Site.

If two or more Sites choose to

*receive*

the application form, Volgistics creates a single volunteer record in the database for the applicant and makes the record so it's shared between each of the Sites by listing each Site in the Sites box on the [Core tab \[pg:1868\]](#) in the volunteer's record. This is the standard procedure for sharing volunteer records between Sites under the Site Level Access feature.

If one Site chooses to *receive* the application from their mailbox, and another Site chooses to *delete* the same application, it will appear as a volunteer record only for the Site that chose to receive the form.

As with any application form sent to a specific Site, the headquarters Site will only see the new application if they check the *All Sites* checkbox on the Applications tab in their mailbox. If the headquarters Site *receives* an application sent to multiple Sites, it becomes a record shared between all of the receiving Sites and no longer appears in the individual Site's mailboxes. If the headquarters Site *deletes* an application before any of the Sites *receive* it, it is deleted from the mailbox of all of the Sites.

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## Volunteer Policy, Confidentiality and Release Agreements

Help topic 2128

Added or revised 01-07-2015

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It's common for volunteer leaders to ask volunteer applicants to sign 'statements of understanding,' 'confidentiality agreements,' and/or 'releases' for background checks at some point during the volunteer application process.

With online volunteer application forms you can incorporate these agreements into the application form, or include them as a separate application steps performed later. You should choose the method that best suits your needs and satisfies your own organization's requirements.

Your [online volunteer application form \[pg:0413\]](#) can optionally contain an [I Agree \[pg:1348\]](#) section. This section will appear at the bottom of the form. It can include any type of agreement you choose to obtain from the applicant. At the end of the agreement section, the form will include an 'I agree' checkbox. The applicant must check 'I agree' before they can submit their form. Many businesses and organizations use this type of electronic acceptance in place of actual signatures. However it's up to you or your organization to decide if this electronic form of acceptance is adequate in your situation.

If you must obtain an original signature from volunteer applicants, consider these alternatives:

- Ask applicants to sign a paper copy of your agreement at the time of an interview or orientation meeting
- Send applicants a paper copy of your agreement by postal mail or a PDF version by email for them to sign and return.

Use the Volgistics Checklist feature to track whether or not prospective volunteers have returned their signed agreement.

If you ask prospective volunteers to sign paper agreements, you can either omit the 'I agree' section from your online form, or use it for a statement to this affect:

I understand and agree that submitting this application form does not automatically register me as a (a name) volunteer, and that there may be certain qualifications I must meet, including the acceptance of established volunteer policies and procedures before I may begin volunteering.

By submitting this form, I attest that the information I have provided on the form is true and accurate.

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## Opportunity Directory

Help topic 2250

Added or revised 03-07-2009

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Use the opportunity directory feature to provide prospective volunteers and others who visit your web site with information about your volunteer opportunities. You insert a simple HTML tag on one or more of your web pages to add the opportunity directory to your web site. Your directory can include the information you choose for any assignments you specify, such as the job description and minimum age. You can update your directory by adding and removing assignments or changing assignment information from within Volgistics without having to make any changes to your web site.

This is an example of an opportunity directory:

The screenshot displays a web interface for an opportunity directory. On the left, there is a sidebar with a tree view of categories. The 'Downtown Region' is expanded, showing a list of roles: Animal assisted therapy, Book Cart, Client Advocate, Client Intake, Docent, Information Desk, Instructor, Phones, Records, Speakers Bureau, Special Events, and Transportation Driver. Below this, the 'Northeast Region' is collapsed. The main content area on the right shows a detailed view for the 'Animal assisted therapy' opportunity. The details include: Location: Downtown Region; Duties: Medical research has proven that pet owners live longer happier lives and handle stress more gracefully, in general, than people who do not own pets. In this volunteer job, pet owners bring their pets to the facility. Patients and patient's families play and interact with the pets providing much needed diversion, motivation, and relief during difficult times.; Qualifications: This job requires very special pets and pet owners. A veterinarian screens all animals for disease. Additionally, all pets and pet owners are required to pass a 6-session training course. Transportation for the pet and pet owner can be arranged if needed.; Address: 100 Main Street, Bedford Falls, IN 12345; Minimum age: 18; Availability: Ongoing needed; Volunteers: 2 hours Weekly serve up to; Location: Downtown.

## Setup the opportunity directory feature

To setup the opportunity directory:

1. Choose Setup from the [menu \[pg:0215\]](#).
2. Select "Online forms."
3. Select "Opportunity directory."
4. Configure the [settings \[pg:1368\]](#) for the opportunity directory to suit your needs.
5. Make a note of your organization's 'public account identifier.' It appears on the [Opportunity Directory setup page \[pg:1368\]](#).
6. Click the **Save** button.

## Creating links to your opportunity directory

### Important

The HTML links described in this help topic include your account's *public account identifier* **not** your nine digit *account number*. Be sure you include your *public account identifier* and **not** your nine-digit *account number* where indicated in these links.

The *public account identifier* is different than your nine digit *account number*. The public account identifier is used in this link instead of your actual nine-digit account number for security purposes (using this public account identifier keeps your account number private).

You can create links to your opportunity directory two ways. One way is to place the directory directly onto one (or more) of your web pages using an HTML 'inline frame.' This approach gives the directory an integrated look, and does not cause a new window to open in your visitor's browser. The second way is to open the directory in a new browser window using a simple hyperlink.

In order to create a link to your opportunity directory you must know the 'public account identifier' for your Volgistics account. If you don't know your Volgistics public account identifier you can obtain it from the opportunity directory setup page as described in the steps listed above.

#### Integrating the directory with your own web page

To include the directory on a page in your web site insert the following HTML tag at an appropriate location on the web page you choose.

```
<IFRAME SRC="http://www.volgistics.com/ex/portal.dll/Od?From={public account number}"  
NAME="directory" HEIGHT="1200" ALIGN="LEFT" WIDTH="600"> </IFRAME>
```

Be sure to replace {public account identifier} with your own public account identifier. The link will not work without this. For example, if your public account identifier were '1234,' your link would look like this:

```
<IFRAME SRC="http://www.volgistics.com/ex/portal.dll/Od?From=1234" NAME="directory"  
HEIGHT="1200" ALIGN="LEFT" WIDTH="600"> </IFRAME>
```

You can integrate this iframe with the other standard elements of your web site. For example, you might include your web site's usual menu and graphics on the page, or add the iframe directly to an existing web page.

For best results, locate this link on a page that has adequate space for the width and height of the directory. You can control the width and height of the directory by changing the "WIDTH=" and "HEIGHT=" values in the IFRAME tag. Make your frame large enough to accommodate your assignment list and a typical job description. If necessary, experiment with different width and height settings until you find an optimal size.

#### Opening the directory in a new browser window

If you would rather open your opportunity directory in a new browser window, use the following HTML hyperlink:

```
<A HREF="http://www.volgistics.com/ex/portal.dll/OD?From={public account  
number}]">Volunteer Opportunities</A>
```

Be sure to replace {public account identifier} with your own public account identifier. The link will not work without this. For example, if your public account identifier were '1234,' your link would look like this:

```
<A HREF="http://www.volgistics.com/ex/portal.dll/OD?From=1234">Volunteer  
Opportunities</A>
```

With either style link, you can control the background color and font characteristics for your opportunity directory on the [Ground Rules \[pg:1330\]](#) page for Online Forms.

## Choosing the assignments you want to appear on the directory

Your opportunity directory includes only the active volunteer assignments you choose.

To include a specific assignment on your directory:

1. Choose Assignments from the [menu \[pg:0215\]](#).
2. Click on the name of an Assignment you want to include in your directory
3. Check the 'Advertise' checkbox on the Assignment tab.

### Info Desk

**Assignment** | Coordinators | Profile | Description | Volunteers | Schedule

Save | Cancel | Combine, move or delete

**Name**

Site: Sample Agency Name  
Place: Administration  
Assignment: Info Desk

Status: Active  Advertise  Sign-in option  Schedule reminders

4. Click the **Save** button.



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## How to keep all of a report's columns on one page

Help topic 1007

Added or revised 03-07-2012

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If a report includes many columns, additional pages may be required to accommodate all of them. While your report may contain so many columns that it does ultimately need to continue on an additional page, there are some steps you can take to minimize the number of pages your report will fill. When creating your report, consider the following options:

### The Options tab

1. Do not display the level of detail beyond what you need. For example, if it is not imperative to organize your report by assignment, do not choose to organize it by "Site, Place & Assignment," as this will create separate columns for each level of organization.
2. Exclude total columns unless necessary.
3. When given the option, do not list volunteers unless necessary.

### The Fields tab

1. Do not include a blank column.
2. For the *volunteer list* report in particular, note that there are several ways to display the same information. Some ways require more columns than others, so be sure to review your field choices carefully.

For instance, you can check a box for "Title," a box for "First name," and a box for "Last name." Alternatively, you can click the box next to "Title First name Last name." Either way will give you the same three pieces of information, but the former will take three columns to display it and the latter will fit it in one column.

### The Page design tab

1. In most reports, the Page design tab includes a "Fit to page" option. However, due to their design, this option is not in Volunteer Profile, Schedule and some label reports. Checking this box will reduce the font size of text in your columns to fit more of the report on one page.
2. Reduce the margin width. Entering smaller margins will permit your columns to expand closer to the edge of the page.
3. Change the page orientation from Portrait to Landscape.

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## Creating a Source File for Microsoft Word Mail Merge

Help topic 1018

Added or revised 10-19-2007

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The mail merge feature in Microsoft Word merges a source (data) file that contains names and addresses with a document that contains a letter to create personalized letters for each volunteer. Volgistics can be used to create an Excel spread sheet file with volunteer names and address to use as the source (data) file for mail merge.

### Step 1. Create an Excel spread sheet file to use as the source (data) file

1. Choose Print from the [menu \[pg:0215\]](#).
2. Select 'Excel spread sheet.'
3. Select 'Names and addresses (stock).'
4. Click the **Print it** button.
5. On the "Include" page, indicate whether all volunteers or only certain volunteers should be included in the mail merge. For example, mail merge can be limited to just the volunteers with a specific Type or Flag, or to include only those who belong to a particular Set.
6. Click the 'Start Printing' button.

### Step 2. Save the spread sheet to the computer

The spread sheet will be sent to the Volgistics Mailbox within a few minutes. When this spread sheet file arrives in the mailbox, save it to the computer, like this:

1. Select Mailbox from the [menu \[pg:0215\]](#).
2. Right-click on the link to the spread sheet created above, and then click 'Save target as.'
3. Choose a place on the computer to save the file. If the file is saved to the desktop, it can be easier to find again later.

### Step 3. Perform the mail merge

Now perform the mail merge in Word. When asked to choose the source (data) file for the mail merge, select the Excel file saved to your desktop. All of the names and addresses saved to the Excel file will be merged with the Word document.

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## Options

Help topic 1105

Added or revised 11-08-2007

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The Options page appears when you create a new report or modify an existing report. Use the controls on the Options page to customize the structure of a report.

The settings controlled on the Options page vary by report type, but items commonly found on this page are related to how information is displayed in report columns. For instance, the Options page includes the ability to sort volunteers by name or [volunteer number \[pg:1856\]](#), include total columns for numerical fields, print grand totals at the bottom of a column, and insert page breaks.

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## Fields

Help topic 1106

Added or revised 11-08-2007

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The Fields page appears when you create a new report or modify an existing report. Use the options on the Fields page to customize the fields you want to appear in your report.

For example, many reports allow you to include information about each volunteer, specifically information stored on various tabs within the volunteer record, or service information, such as Hours, Hours value, service measures, and more.

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## Include

Help topic 1107

Added or revised 11-14-2007

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The Include page appears when you create a new report or modify an existing report. Use the options on the Include page to choose the report's format (PDF or Excel). Also use the Include page to choose which volunteers and, in the case of service reports, service should be reflected in your report. In the case of labels reports, use the Include page to determine which labels, if any, should be skipped on the first sheet of the report.

For report-specific guidance on the Include page, click the "Help" link on that report's Include page.

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## Batch Report

Help topic 1120

Added or revised 12-18-2007

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Use the Batch report to view a listing of each hour entry posted in a particular batch with the [Post \[pg:1559\]](#) feature. A Batch Report contains all service information included in a posted batch. This type of report is often used to compare posted information to the information on a written time sheet.

Upon posting service on the Post page, Volgistics generates a batch number and a **Print Batch Report** button is displayed.

# Finished!

Batch number: 27

Print Batch Report

A Batch report for the most recently posted batch of service can be printed from this page, whereas Batch reports for any batch posted over the past year can be printed from the Print page.

Take the following steps to print a Batch report for a batch posted in the past year:

1. Choose Print from the menu.
2. Choose Batch report, and click on Batch report again.
3. Click either the **Print it** or **Modify it** button.
4. Enter the batch number, and click **Print**.

If you do not know the batch number, enter the date the batch was posted, and click **List batch numbers for date**. Enter the appropriate batch number, and click **Print**.

Batch reports cannot be saved in Volgistics, but they can be saved to your computer or re-run at any time.

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## Clipboard Copy

Help topic 1149

Added or revised 05-12-2016

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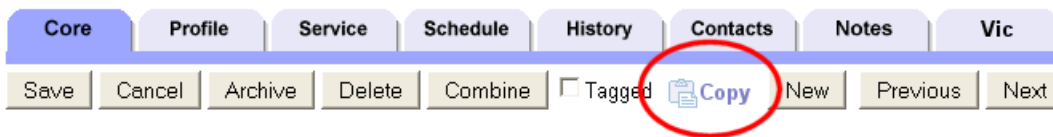
The Clipboard Copy feature provides an easy way to copy an individual volunteer's name and address (and optionally other information) to your computer's clipboard.

Once you have configured the [Clipboard copy setup page \[pg:1379\]](#) to include the volunteer information you would like to be copied, you can use this feature to copy and then paste this information into other documents, such as Microsoft Word files.

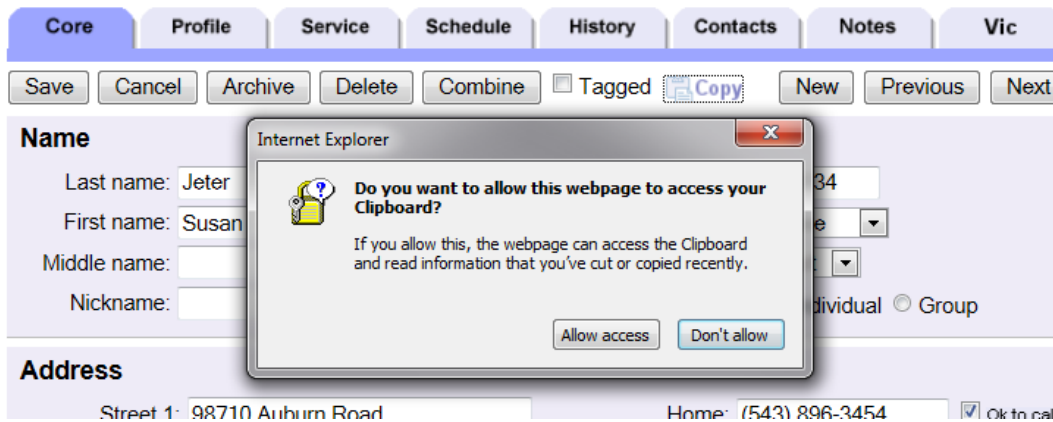
For example, if you already have Word documents setup for form letters or envelope printing, you can use the Clipboard Copy button in Volgistics to copy and paste an individual volunteer's name and address into those documents.

To use the Copy feature:

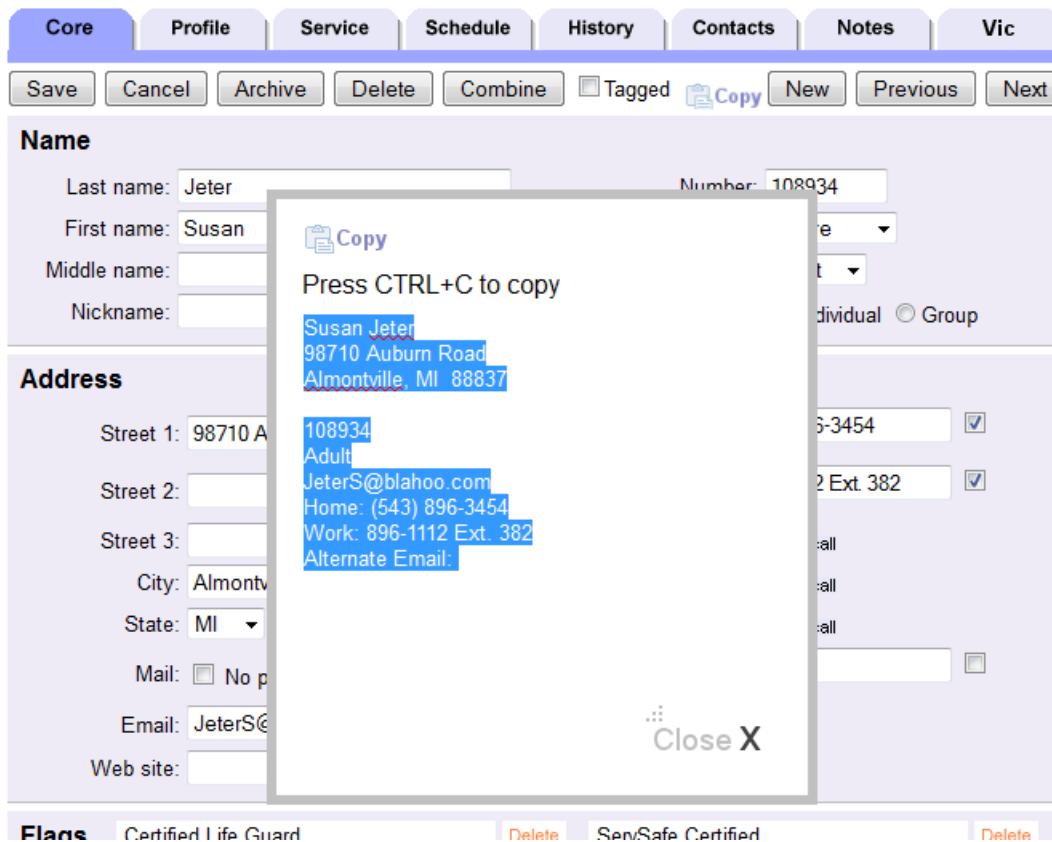
1. Open the record of the volunteer whose name and address you would like to copy.
2. Locate the orange "Copy" link on the Core tab, and click on the link.



3a. If you're using Internet Explorer as your web browser, you may see a security window asking if it is okay for the webpage to access your computer's Clipboard. Click the button to allow access to allow the information to be copied.



3b. If you're using Safari, FireFox, Chrome or a different web browser, you will see a pop-up window with the fields you selected to be included in the Clipboard copy feature. Press the Control and C keys at the same time to copy this information.



4. Open the Word or other document into which you would like to paste the volunteer's information.
5. Right-click the mouse in the document, and select Paste.

The selected volunteer information will be pasted into the document.

Note that the ability to use of this feature may be dependent upon your web browser and its settings. If you experience trouble using this feature, you may have to change your security settings to allow it to work.

Volgistics currently supports this feature for Internet Explorer 9 and 11. While this feature has been tested with other web browsers, we do not guarantee its functionality with these browsers.

Also note that this feature is designed for situations where a single volunteer's name and address is needed in another document. If you need the names and addresses of *many* volunteers in another document, print a Volgistics report, such as a Volunteer List report, to Excel. Then copy the information from Excel and paste it into Word.

---

## Why Service Details and Service Summary Reports Cannot Be Organized

Help topic 1151

Added or revised 08-26-2013

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When creating reports that include service information, it is not possible to sort the data by volunteer Flag. Since the Flag field is designed for situations where volunteers can be classified into more than one category at a time, there would be no way to deal with hours contributed by volunteers with more than one Flag. For example, if a volunteer has the Flags "Student" and "Researcher" and a system operator prepares a service report for the year that includes this volunteer's hours, would the hours be reported in the "Student" section of the report or the

"Researcher" section? There is no logical way to make this determination; therefore, the system will not organize service details or service summary reports by Flag.

You can, however, print a service details or service summary report that includes service only performed by volunteers who have a particular Flag. This option can be selected on the report's Include page.

In contrast to Flags, reports *can* be organized by volunteer Type. In this case, volunteers can only be assigned to one Type, so it is possible to accurately organize a particular volunteer's service under the single Type that is recorded on their Core tab.

## Related help

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## Including Merit Hours on Reports

Help topic 1160

Added or revised 12-18-2013

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If you have [setup merit hour rules \[pg:1409\]](#) to apply to volunteer service completed under certain conditions in your organization, you can include a column to reflect [merit hours \[pg:1564\]](#) in [Service Detail \[pg:0560\]](#) and [Service Summary \[pg:0580\]](#) reports. When [creating \[pg:0467\]](#) either type of service report, go to the report's [Fields \[pg:0426\]](#) page, and mark the box next to "Merit Hours" to include a Merit Hours column in your report.

## Fields

Choose the fields you want to appear in this report.

### For each calendar year list...

- Hours
- Hours value
- Hours FTE comparison
- Merit hours
- Merit hours value
- Merit hours FTE comparison
- Absences
- Absences value

When your report is printed, it will display the options selected on the Fields page.

		<b>Service Summary</b> Sample Internal Account			
Site	Place	Assignment	2007 Hours	2007 Merit Hours	
Headquarters	Administration	Info Desk	72:31	96:42	
		Landscaping	16:30	16:30	
		Patient Intake	8:00	8:00	
		Records	3:00	3:00	
		Speaker's Bureau	13:00	13:00	
		Total		113:01	137:12
	Client Services	Client Advocate		14:33	16:33
		Transporation Driver		31:01	49:01
		Total		45:34	65:34

---

## Why don't my service reports match?

Help topic 1172

Added or revised 11-28-2011

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Occasionally you might run a Service Summary report and a Service Details report for the same time period but find that different service totals are displayed at the bottom of these reports. This help topic offers several possible reasons for this type of discrepancy.

If you find that two service reports show conflicting service information:

First, check the Include pages for both reports.



1. Be sure you have specified the same date range for both reports. For example, the following reports are for the same six month period:



Which **month(s)** do you want to include in this report?

- All of the months so far in the current calendar year
- All of the months so far in the current fiscal year

Start with:    
End with:

Which **service** do you want to include in this report?

- Include service for the most recently ended month
- Include service for this period:

These months:

From:    
Through:

These days:

From:     
Through:

2. If you have chosen for either report to include just the volunteer service for a specific Directive or Assignment, be sure you make the same selection on both reports. For example, the service reports below would *not* contain the same service information, as the first image depicts a Service Summary report setup to include service in all Directives and Assignments, while the second service report is configured to include service in all Directives but *only* in the Client Advocate Assignment.

Only include service for this Directive

Community Outreach

Only include service in...

Birding [East East \ Environmental Educat...]

Only include service for this Directive

Community Outreach

Only include service in...

Client Advocate [Headquarters \ Client Services]

3. Similarly, if you only include certain volunteers on these reports, be sure you are selecting the same volunteers for both reports. Be sure to check the Status, Type, Flags, Site and Set selections on both reports, as any difference in any of these areas will affect which service is included.

4. In addition to selections on the report's Include page, it may be that one report included service records that were not associated with an Assignment, while the other report did not include these records. In other words, you may have some service records that were entered without an Assignment, and these may have been included on one report but not on the other. If either report is organized by Site, Place, or Assignment, look for an Assignment labeled "(None)" near the end of the report. This would include service records that do not have an Assignment.

#### Related help

[Help Topic 1164 \[pg:1567\]](#) - How can I find all of the volunteers with a service record missing an Assignment entry?

[Help Topic 2223 \[pg:0467\]](#) - Creating custom reports

[Help Topic 1107 \[pg:0426\]](#) - Include

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## Why doesn't the data in my reports line up?

Help topic 1209

Added or revised 12-05-2013

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Reports in Volgistics can be [customized \[pg:0467\]](#) to include a wide variety of fields. This can sometimes cause a situation where the information in the rows and columns of the report do not line up, or appear to correspond, with each other. This happens because the fields in use are not related, or linked, to each other. Here's an example of when this might happen:

		<b>Volunteer List</b> Your Agency Name							
Volunteer	Service Assignment	Service From Date	Service From Time	Service To Time	Service Hours	Schedule Date	Schedule Assignment	Schedule From	Schedule To
Baccus, Lydia	Laboratory Services Reception Desk	11-05-2013	6:57 am	11:03 am	4:06	11-05-2013	Laboratory Services Reception Desk	7:00 a	11:00 a
	Floor 4 Reception Desk	11-06-2013	7:08 am	11:09 am	4:01	11-06-2013	Laboratory Services Reception Desk	7:00 a	11:00 a
	Laboratory Services Reception Desk	11-07-2013	7:05 am	11:07 am	4:02	11-07-2013	Laboratory Services Reception Desk	7:00 a	11:00 a
	Laboratory Services Reception Desk	11-12-2013	6:59 am	11:00 am	4:01	11-08-2013	Information Desk	11:00 a	3:00 p
	Laboratory Services Reception Desk	11-13-2013	7:02 am	11:09 am	4:07	11-12-2013	Laboratory Services Reception Desk	7:00 a	11:00 a
	Laboratory Services Reception Desk	11-19-2013	6:55 am	11:11 am	4:16	11-13-2013	Laboratory Services Reception Desk	7:00 a	11:00 a
	Welcome Center Desk	11-20-2013	7:07 am	11:04 am	3:57	11-14-2013	Welcome Center Desk	7:00 p	11:00 p
	Laboratory Services Reception Desk	11-21-2013	6:57 am	11:01 am	4:04	11-19-2013	Laboratory Services Reception Desk	7:00 a	11:00 a
	Laboratory Services Reception Desk	11-27-2013	7:04 am	11:07 am	4:03	11-20-2013	Laboratory Services Reception Desk	7:00 a	11:00 a
						11-21-2013	Laboratory Services Reception Desk	7:00 a	11:00 a
						11-26-2013	Laboratory Services Reception Desk	7:00 a	11:00 a
					11-27-2013	Laboratory Services Reception Desk	7:00 a	11:00 a	
Barker, Geraldine	Mail Delivery	11-04-2013	10:00 am	2:30 pm	4:30	11-04-2013	Mail Delivery	10:00 a	2:30 p

In this example, the report is setup to include [service \[pg:1581\]](#) and [schedule \[pg:0746\]](#) information for the volunteers. You can see the report has the volunteer's name in a row and then [assignments \[pg:0096\]](#), dates, times, and hours fields in columns. The confusion is caused because the assignment information is repeated in the same row depending on whether it is related to the service or the schedule information. So it may look like there is a one-to-one correlation even though the fields are not related to each other. In the example, you can see that the volunteer was scheduled for more dates than she has service information recorded for, and on some dates (such as 11-06-2013) she has service recorded in a different assignment than she was scheduled for.

To interpret the report in the example, just keep in mind that all the columns that have "Service" in the title ("Service Assignment," "Service From Date," etc.) relate to each other and all the columns that have "Schedule" in the title ("Schedule Date," "Schedule Assignment," etc.) relate to each other. However, the service and schedule columns do not relate to each other even if they both have information in the same row.

Another example of when this might occur appears below:

		<b>Volunteer List</b> Your Agency Name			
Volunteer	Checklist	Dates Kind	Dates Event	Dates Date	Dates Expires
Tanis, Elizabeth	3-Month Evaluation (due again 03-10-2014)	Checklist	Assigned	12-11-2012	
	Annual Competency Evaluation (due again 11-11-2014)	Checklist	Background Check	12-11-2012	12-11-2013
	Assigned (complete)	Checklist	3-Month Evaluation	03-12-2013	03-10-2014
	Background Check (due again 12-11-2013)	Checklist	Annual Competency Evaluation	11-11-2013	11-11-2014
	ERTK (pending)				
HIPAA (pending)					
Interview (pending)					
MMR (pending)					
Orientation Quiz (pending)					

In this example the report contains the [Checklist \[pg:0142\]](#) "Items pending" and "Items completed" fields as well as date records for the Checklist items. Even though all the fields are related to Checklist items, they are not related directly to one another. So what occurs is that one row may have information for two different Checklist items.

To interpret the report in this example, just keep in mind that the "Items pending" and "Items completed" fields will all be in the Checklist column, while the date record fields will all have "Dates" in the column title. So the rows with the "Dates Kind," "Dates Event," etc. columns all relate to each other.

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## How to Make a Tax Report for Your Volunteers

Help topic 1219

Added or revised 02-09-2017

---

When income tax season comes, you may have volunteers request a report showing the number of times they volunteered during the year so they can deduct their mileage on their tax returns.

If you only have a few volunteers who want a report, you can just tag their record (or records) and run a report such as the [Volunteer service details \(stock\) \[pg:0612\]](#) report. You can learn more about how to run a report for a tagged record (or tagged records) in [help topic 2322 \[pg:0471\]](#).

If most of your volunteers will need a report, you may want to run a report for all of your volunteers at once. Then you can just print out the page(s) of the report that apply to the volunteer if a volunteer asks for the printout. This help topic explains how to create a report to do this.

1. Select Print from the [menu \[pg:0215\]](#).
2. Expand the Service Details link.
3. Select *Volunteer service details (stock)*.
4. Click the **Clone it** button.

**Print**

### Volunteer service details (stock)

What would you like to do?

<input type="button" value="Print it"/>	Run this report now (send to your In Box)
<input type="button" value="Example"/>	Show me an example of this report
<input type="button" value="Modify it"/>	Make setup changes to this report
<input type="button" value="Clone it"/>	Create a new report based on this report
<input type="button" value="Cancel"/>	Return to the Print window

5. On the Options tab, change

*List volunteers?*

to

*Only if they have service to report*

if you do not want a page for volunteers who did not have any service recorded during the year. At the bottom, check the box by *Page breaks* so each volunteer's information will be on separate pages of the PDF [pg:1606].

The screenshot shows a configuration window with a yellow background. At the top, there is a section titled "Cluster, Site, Place & Assignment". Below this, there are radio button options for "Include volunteers?". The first option is "No". The second option is "Only if they have service to report", which is selected. The third option is "Even if they do not have service to report". Below these options, there is a section for "if their Role is:" with several checkboxes: "Assigned", "Former", "Preference", "Substitute", and "Trainee". At the bottom left, there is a "Sort" dropdown menu with "Name" selected. At the bottom right, there are buttons for "Help", "Next", and "Cancel".

Cluster, Site, Place & Assignment

Include volunteers?  No  Only if they have service to report  Even if they do not have service to report

if their Role is:  Assigned  Former  Preference  Substitute  Trainee

Sort  Name

Page breaks:  Start a new page for each volunteer

Help Next Cancel

6. On the Fields tab, you can adjust which fields of information will show. For example, you can remove the *Merit Hours* [pg:1564] field. Additionally, if you've made *Service Measures* [pg:1557] for tracking mileage or visits you can add them to the report. (You can learn more about how to make a Service Measure for mileage in *help topic 2271* [pg:1422].)

7. On the Page Design tab, you can change the title of the report and change the report's format if you'd like.

8. On the Include tab, select

*Include service for this period*

and

*These months*

. Then select January through December of the year you're running the report for. You can optionally choose to run the report for just a certain group of volunteers, such as just volunteers with the Active *Status* [pg:1832].

## Which **service** do you want to include in this report?

- Include service for the most recently ended month
- Include service for this period:
  - These months:

From:    
Through:

9. On the Save tab, give the report a name such as "Mileage Report" or "Tax Deduction Report" so you can find it again next year when you need it. Click the **Save and Print** button to start the report. When the Include tab appears again, click the **Start printing** button.

---

## Print a Report for a Single Archived Volunteer

Help topic 1220

Added or revised 03-03-2017

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The archived section of your database is designed to store records for volunteers who are no longer serving. Archived records cost much less than non-archived records on a record-by-record basis because they have more limited functionality. You can learn more about the differences in archived and non-archived records in [help topic 1999 \[pg:0709\]](#).

One difference between non-archived and archived records is that archived records cannot be [tagged \[pg:1529\]](#). This means that there is not a way to print a report for a just one archived volunteer (or a selected group of archived volunteers) using tags. You can temporarily [restore the archived volunteer\(s\) \[pg:1852\]](#), print the report, and then return the volunteer(s) to the archives. You can also use the trick shown in this help topic to print a report for one (or more) selected archived records.

The first step is to make a Flag to identify the volunteers to include on the report. To do this:

1. Select [Setup \[pg:0887\]](#) on the menu.
2. Expand the *Field options* link.
3. Select *Core tab*.
4. Select *Flags*.
5. Enter the Flag (such as *Archived (Include on Reports)* or something similar) in the *Add a new item* field and click the **Save** button to the right of the field.
6. Click the **Save** button at the bottom of the page.

Now, add this Flag to the [Core tab \[pg:1868\]](#) of the archived record(s) you need the report for. If you're unfamiliar with how to find archived records, see [help topic 1998 \[pg:1817\]](#).

Once you have the Flag on the record(s) you want the report for, you're ready to run the report. Archived records are always included on [Service Detail \[pg:0560\]](#) and [Service Summary \[pg:0580\]](#) reports. If this is the type of report you need, you can just run the report and on the *Include* tab select *Any of these* under Flags. Check the box next to the Flag you created and added to the record(s).

Groups only

Flags

Any

Any of these

All of these

Not any of these

Approved Driver

Archived (Include on Reports)

Blue Team

CPR Certified

Deceased

Employee

First Aid Certified

Former Employee

Green Team

Policy Review Committee

Red Team

Terminated

If your report is not based on service information, you will need to use an [Excel spreadsheet \[pg:0513\]](#) style report and select to include archived records on the report as shown in [help topic 1997 \[pg:0442\]](#). When you get to the Include tab of the report, select to limit the report to just records with the Flag as shown above.

Once you have your report you can remove the Flag from the Core tab of the archived record(s). That way if you need to include a different selected archived record on a report in the future, the volunteer(s) who is currently flagged will not be included.

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## How to Delete Multiple Reports

Help topic 1308

Added or revised 05-13-2013

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If you have created [custom reports \[pg:0467\]](#) in your account, you can delete these if your [System Operator \[pg:0065\]](#) rights allow it. Deleting a report *cannot be undone* so if your account has more than one operator, you may want to check with the others to make sure they do not use a particular report if you're unsure. This help topic shows you how to delete multiple reports at once. See [Help Topic 2108 \[pg:0450\]](#) if you want to delete a single report.

Before deleting reports, you may want to note the names of un-needed reports. To do this:

1. Select Print from the [menu \[pg:0215\]](#).
2. Expand a link such as "Service details" or "Service summary" to see the names of the reports. You can delete any [custom report \[pg:0467\]](#) that has been created in your account.\* [Stock reports \[pg:0595\]](#) and [batch reports \[pg:0426\]](#) cannot be deleted.
3. If you need more information on the settings and/or fields selected to be included for a report, you can review these by clicking on the name of the custom report and then clicking the **Modify it** button.

Once you know which reports you wish to delete, you can do this by:

1. Choose Print from the [menu \[pg:0215\]](#).

2. Click the

### Delete Multiple Reports

button. This appears at the bottom of the report list. If you do not see a **Delete Multiple Reports** button, your Volgistics [System Operator \[pg:0065\]](#) rights do not include the ability to delete reports. In this case, contact your organization's [Volgistics Administrator \[pg:0052\]](#) for further assistance.

3. Check the box in front of the name of each report you want to delete.

4. When all the reports you wish to delete are marked, click the **Delete Checked Reports** button if you wish to delete the reports. Click the **Cancel** button if you want to close the box without deleting any reports.

5. Because deleting reports cannot be undone, a confirmation box will appear if you clicked the **Delete Checked Reports** button. Click the **OK** button if you're sure you want to delete the reports. Click the **Cancel** button if you wish to stop the process.

After you complete these steps the reports you selected to be deleted will no longer appear under the links where they were located.

#### \*Deleting reports for Site-Level Operators

If you have [Site Level Access \[pg:0092\]](#) turned on in your account, *or it was turned on at any point in the past*, you may have reports that were created by [Site-Level Operators \[pg:1442\]](#). By design, these reports are not visible to other Site-Level Operators. Also, by default headquarters level operators will not see these reports. If you are a headquarters level operator and you'd like to see these reports, check the "All Sites" checkbox that appears at the top right corner of the Print page.

#### Related help

[Help Topic 2108 \[pg:0450\]](#) - How to Delete a Report

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## How to Stop Automatic Reports

Help topic 1311












Added or revised 10-12-2015

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Volgistics has a feature that will allow reports to run [automatically \[pg:0473\]](#) during overnight maintenance. These reports will be delivered to the [In Box \[pg:0303\]](#) tab of your Volgistics mailbox when they are finished. This feature works great for reports you need on a regular basis, but you may have automatic reports that are no longer needed. In this case, the automatic reports can quickly clutter your In Box. This help topic focuses on how to find the automatic reports so you can delete them, or change the settings so they are no longer run automatically.

The first step is to look at the In Box tab to see if you can determine if a report is being run automatically. One clue you can look for is when the report was delivered to the In Box. Automatic reports are run during overnight maintenance, and this occurs between 3:00 and 6:00 a.m. Eastern time. Another thing you can look for is a repeating pattern for the report. Automatic reports can be run on the same day of the week or the same day of the month. You can see an example of this in the image below. The report titled *Auto Report Friday Schedule* was run in a time frame that matches the overnight maintenance window and the dates are a week apart.



In Box 		All sites 		
Kind	Date	Subject	To	
<input type="checkbox"/> Report 	10-08-2015 4:00 a	<a href="#">Auto Report Friday Schedule</a>	Alexandra Call	
<input type="checkbox"/> Report 	10-07-2015 4:10 a	<a href="#">Auto Report Thursday Schedule</a>	Alexandra Call	
<input type="checkbox"/> Report 	10-06-2015 4:10 a	<a href="#">Auto Report Wednesday Schedule</a>	Alexandra Call	
<input type="checkbox"/> Report 	10-05-2015 4:04 a	<a href="#">Auto Report Tuesday Schedule</a>	Alexandra Call	
<input type="checkbox"/> Report 	10-04-2015 4:07 a	<a href="#">Auto Report Monday Schedule</a>	Alexandra Call	
<input type="checkbox"/> Report 	10-03-2015 4:10 a	<a href="#">Auto Report Sunday Schedule 2</a>	Alexandra Call	
<input type="checkbox"/> Report 	10-03-2015 4:10 a	<a href="#">Auto Report Sunday Schedule</a>	Alexandra Call	
<input type="checkbox"/> Report 	10-01-2015 4:05 a	<a href="#">Auto Report Friday Schedule</a>	Alexandra Call	
<input type="checkbox"/> Report 	09-30-2015 4:07 a	<a href="#">Auto Report Thursday Schedule</a>	Alexandra Call	
<input type="checkbox"/> Report 	09-29-2015 4:07 a	<a href="#">Auto Report Wednesday Schedule</a>	Alexandra Call	

Remember that if you are not in the Eastern time zone you will need to adjust the run times for your time zone. For example, if you are in the Pacific time zone your automatic reports may arrive between midnight and 3:00 a.m.

Also, if you have a large number of reports on the In Box tab, it may help you see a pattern if you click the heading on the *Subject* column. This will re-sort the In Box so that reports with the same title are grouped together.

Once you've identified that a report is most likely an automatic report, the next step is to delete it, or change it so that it doesn't run on an automatic basis. Before you do this, it is a good idea to check with the operator who is listed in the *To* column to see if she or he still needs the report. Instead of deleting the report entirely, the operator may want to keep the report but not have it run on an automatic basis. Once a report is deleted there is not a way to recover it so if it is deleted the report will need to be setup again if it was still needed.

When you're sure you want to stop the automatic report, the next thing you will want to do if you have a large number of reports is narrow down what type or style the report is. The Print page in Volgistics is divided into different kinds of reports.

## Print

Choose the kind of report you want to print.  
Move your mouse over any stock report to view a sample.

### Table Style Reports

- Awards
- Batch report
- Excel spread sheet
- Service details
- Service summary
- Statistics
- Volunteer list
- Volunteer profile

### Label Style Reports

- Address labels
- Labels
- Name tags

### Other Reports

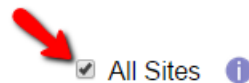
- Assignment profile
- Schedule

In many cases, you can tell what type or style of report is being run by opening it from the In Box tab. If you're unsure of the type of report you have, it may help to compare it to examples of the different reports that are available. You can find examples of different types of reports in [help topic 2104 \[pg:0595\]](#).

Now you're ready to find the report(s). To do this, select *Print* from the [menu \[pg:0215\]](#) and expand the link for the type of report you believe is being run. Look for the name of the report on the list. You may need to expand a few different links to find the report. If you're not able to find the report, it may be that your account has (or once had) the [Site Level Access \[pg:0092\]](#) feature turned on. In this case, check the box for *All Sites* that appears in the top right corner of the Print page and then look for the report.

## Print

Choose the kind of report you want to print.  
Move your mouse over any stock report to view a sample.



### Table Style Reports

- Awards
- Batch report
- Excel spreadsheet

After you select the name of the report, click the **Modify it** button and then go to the **Save** tab to check if the report is configured to be run on an automatic schedule.

Would you like this report to run on an automatic schedule?

No, do not print this automatically

Yes, print it on the  of each month

Yes, print it every

Send it to:

Print it on this schedule for...

Headquarters only

If you have the right report, there are two ways to stop it from being run automatically. You can change the setting under *Would you like this report to run on an automatic schedule?* to *No, do not print this automatically*. Remember to click the **Save** button after you make this change. Or, if the report is no longer needed at all, you can delete it.

You can delete a single report by clicking the **Delete it** button after you click on the report's name. [Help topic 2108 \[pg:0450\]](#) explains more. Or, if you have identified more than one report to delete, you can delete multiple reports at once as shown in [help topic 1308 \[pg:0438\]](#).

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## Including Archived Records on Reports

Help topic 1997

Added or revised 03-03-2017

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In Volgistics, your account is divided into two sections--the non-archived records and the archived records. Archived records have more limited functionality compared with non-archived records and each section is used for different purposes. [Help topic 1999 \[pg:0709\]](#) explains more.

One of the ways archived records are more limited is that they do not appear by default on most Volgistics reports. The exception to this is the [Service Details \[pg:0560\]](#) and [Service Summary \[pg:0580\]](#) reports. Volunteer service information will still appear on these reports even if the record is archived as long as the volunteer has service entries during the time frame the report covers. Other report types for archived records are more limited.

The [Excel spreadsheet \[pg:0513\]](#) reports must be used if you want to include specific fields of information for archived records. Here is how to run an Excel spread sheet report for archived records:

1. Choose Print from the [menu \[pg:0215\]](#).
2. Expand the "Excel spread sheet" link.
3. Select "Create a new Excel spread sheet report."

4. On the Options tab of the report, select the option to include just archived records, or the option to include both archived and non-archived records.

The screenshot shows the 'Excel spread sheet 7' interface with the 'Options' tab selected. The 'Options' section contains the following settings:

- Sort by:  Volunteer name,  Volunteer number
- Include column headings
- Include volunteer names in 'child' records
- Only include non-archived volunteer records
- Only include archived volunteer records (highlighted with a red box)
- Include non-archived *and* archived volunteer records

Buttons for 'Help', 'Next', and 'Cancel' are visible at the top right and bottom right of the options section.

5. Finish creating the report by visiting each of the other tabs. You can find more information on options to choose in [Help topic 2223 \[pg:0467\]](#), or by clicking the "Help" link that appears on each tab.

## Name, address and phone list

The screenshot shows the 'Name, address and phone list' interface with the 'Options' tab selected. The 'Options' section contains the following settings:

- Sort by:  Volunteer name,  Volunteer number,  Birthday

A red arrow points to the 'Help' link at the top right of the options section. Buttons for 'Next' and 'Cancel' are also visible.

You can also select to have information from archived records included, or not included, in the information that appears in Statistics reports for your account. Here is how you do this:

1. Choose Print from the [menu \[pg:0215\]](#).
2. Expand the Statistics link.
3. Select "Create a new statistics report."
4. On the Options tab of the report, check the box to include archived records in the report if you want the report's information to be based on both archived and non-archived records. Leave the box un-checked if you only want the report's information to be based on non-archived records.

The screenshot shows the 'Statistics 3' interface with the 'Options' tab selected. The 'Options' section contains the following settings:

- Report by:  Overall,  Type,  Site
- Begin each report section on a new page
- Include a report column for each month
- Archives:  Include archived volunteer records

Buttons for 'Help', 'Next', and 'Cancel' are visible at the top right and bottom right of the options panel.

5. Finish creating the report by visiting each of the other tabs. You can find more information on options to choose in [Help topic 2223 \[pg:0467\]](#), or by clicking the "Help" link that appears on each tab.

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## How do I create a printed Birthday List?

Help topic 2068

Added or revised 09-02-2011

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In addition to the [Birthday list \[pg:1385\]](#) that is optionally displayed on the Welcome page in Volgistics, you might like to print a birthday list, or print mailing labels for volunteers who have a birthday in a particular month.

This help topic shows you how to print such a report.

### Create a 'Birthday' Set

Begin by creating a [Set \[pg:0858\]](#) that will find the volunteers who have a birthday in a particular month.

1. Choose Sets from the [menu \[pg:0215\]](#).
2. Click the **Create a new Set** button.
3. Under "What would you like to call this set?" enter the name of the month. For example 'June Birthdays.'
4. Under "Include volunteers in this set based on" choose 'Their birthday.'
5. Click the **Go** button.
6. Configure the set Rule as shown below. Choose the month you want from the drop-down list.

**Their birthday** Rule

Their birthday is in June

Their birthday is today

Their birthday is tomorrow

They do not have a 'Date of birth' in their volunteer record

Do not include volunteers if "Omit from birthday lists" is checked in their record

[Help](#)

7. Click the **Finished** button.

Your Set for finding volunteers who have a birthday in the selected month is now complete. If you want to print birthday lists every month, you should repeat these steps to create a separate Set for each month of the year (so you would end-up with 12 Sets – one for 'January Birthdays,' 'February Birthdays,' etc.).

### Print the report

You can use the Set you created above to include just the volunteers who have a birthday in a given month on any report. For example, you can use this Set to print a volunteer list report that will include just the volunteers who have a 'June Birthday.'

[Help Topic 2184 \[pg:0863\]](#) explains how to print a report for a Set.

### Create a name and birthday report

Perhaps you'd like to create a custom report that includes volunteer names followed by their birthdays. Here's how you would do this:

1. Choose Print from the [menu \[pg:0215\]](#).
2. Select 'Volunteer List,' and then select 'Create a new volunteer list report.'
3. On the "Options" page, click the **Next** button to proceed to the Fields page.
4. On the "Fields" page check the volunteer name format you prefer. Also check the 'Birthday (no year)' field (or the 'Date of birth' field if you'd like to include the year of birth), and any other fields you'd like on your report.
5. Click the **Next** button to advance to the Page Design page.
6. On the "Page Design" page, enter 'Birthday List' for the 'First title line:.' Also check the 'Add Set name' checkbox.
7. Click the **Next** button to advance to the Include page.
8. On the "Include" page check 'These volunteers..' It's best not to choose your Birthday Set from the "Include" at this point, because your selection here will be saved permanently as part of the report. Since you'll probably want to print this report each month using a Set for the coming month.
9. Click the **Next** button to advance to the Save page.

10. On the "Save" page, enter a name for the report such as 'Birthday List.'

11. Click the **Print** button.

When you initially print the report it will include all volunteers, because a Set was not specified on the Include page. This is okay since we're just creating the report here.

At this point you're ready to print the report for the volunteers who have a birthday in the coming month. This is what you'll do to print the Birthday list each month:

1. Choose Print from the menu.

2. Select 'Volunteer List.'

3. Click on the name of the report you created above.

4. Click the **Print it** button. This opens the "Include" page.

5. On the "Include" page under "Which volunteers would you like to include on this report" check 'These volunteers' and then check "This set." Use the drop-down list next to "This set" to choose the Set you created above (e.g. 'June Birthdays').

6. Click the **Start printing** button.

---

## How reports print

Help topic 2106

Added or revised 04-14-2009

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As soon as you click the

### **Start printing**

button on the Print page, Volgistics goes to work creating your report. You can continue to work in Volgistics while your report is being prepared. Once Volgistics completes your report it will appear on the [In Box \[pg:0303\]](#) tab in your Volgistics mailbox.

How long it takes for a report to arrive in your Mailbox will depend on the type of report you're printing; the number of pages in the report; and other conditions. Normally your reports are delivered to your mailbox within a few minutes, and often in just a few seconds.

### **To open a completed report:**

1. Choose Mailbox from the [menu \[pg:0215\]](#).

2. Select the In Box tab.


Volgistics lists reports in your In Box with the word "Report" in the Kind column. The report name appears in the Subject column, and the date and time you printed the report in the Date column.

# Mailbox

**In Box**   **Out Box**   **Applications**   **Service**   **Help E-mail**   **Documents**

Refresh

**In Box**  All sites

	<a href="#">Kind</a>	<a href="#">Date</a>	<a href="#">Subject</a>	<a href="#">To</a>
<input type="checkbox"/>	Report 	04-12-2009 2:52 a	<a href="#">All volunteer information (stock)</a>	Claire Carson
<input type="checkbox"/>	Report 	04-08-2009 4:19 p	<a href="#">Service Details</a>	Dave Olsen
<input type="checkbox"/>	Report 	04-08-2009 4:18 p	<a href="#">Service Details</a>	Dave Olsen
<input type="checkbox"/>	Report 	04-05-2009 2:48 a	<a href="#">Excel spread sheet</a>	Claire Carson

Click Delete to delete the **checked** messages:  

3. Click on the name of the report in the Subject column.

You can create reports as either PDF or Excel files.

This icon appears next to reports created as PDF files:



If you created a report as a PDF file, the report will open in [Adobe Reader \[pg:0449\]](#) or another PDF reader program if your web browser is setup to recognize PDF files. If a PDF report does not open when you click on it follow the steps in [help topic 2176 \[pg:1606\]](#).

This icon appears next to reports created as Excel files:



If you created the report as an Excel spread sheet file, the report will open in Microsoft Excel or another XLS reader if your web browser is setup to recognize XLS files and you have Microsoft Excel or another XLS file reader installed on your computer. If an Excel file does not open when you click on it follow the steps in [help topic 1109 \[pg:1589\]](#).

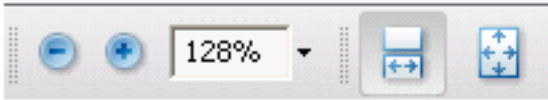
## What to do with PDF reports using Adobe Reader

Once you've opened a PDF report in Adobe Reader you can...

[View it](#)

If you just want to look at the report, you're all set. Just use the Adobe Reader page controls to reduce or enlarge the image, or move to different pages.





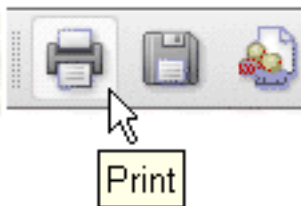
Use these Acrobat Reader toolbar controls to change the size of the report image on your screen.



Use this Acrobat Reader control to move to a different page.

#### Print it

If you want to print a report one time and then you'll be finished with it, you can print it directly from Adobe Reader without having to save it on your computer. Just click the Print button on the Adobe Reader toolbar, shown here:

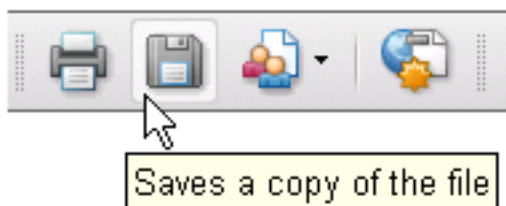


You can delete the report from your In Box when you're finished printing it.

#### Save it

If there's a chance you will want to print a report more than once, or if you want to save it for future reference you should save it to your own computer.

To save a report you've opened in Adobe Reader, click the Save button on the Adobe Reader toolbar, as shown here:



Adobe Reader will ask you to choose the folder on your computer where you want to save the file and give you an opportunity to choose a name for the file. Enter a file name that makes sense to you (be sure to keep the ".pdf" file name extension so your computer will know it's an Adobe Reader file), then save the file.

There is a limit to the number of reports you can [store in your Volgistics mailbox \[pg:0303\]](#), so it is important to save reports to your own computer if there's a chance that you will want to use it in the future.

#### Email it

A handy capability with Adobe Reader files is that they're easy to send to others as email attachments. Since most computer users have Adobe Reader, just about anyone you choose to send an Adobe Reader file to can view and print it without any compatibility issues.

Before you can send a Volgistics report to others by email you must save it to your own computer. Follow the directions above to save the Adobe Reader file, then include the saved file as an email attachment to anyone you choose.

#### **What to do with Excel reports using Microsoft® Excel**

Once you've opened an Excel spread sheet report in Microsoft Excel you can...

#### View or print it

If you just want to look at the spread sheet or print it without any changes, you can open it directly from your Volgistics mailbox as long as your web browser is setup to recognize XLS files and you have Microsoft Excel or another XLS file reader installed on your computer (if an Excel file does not open when you click on it, follow the steps in [help topic 1109 \[pg:1589\]](#)).

To print a copy of an Excel file, choose Print from the File menu in Microsoft Excel.

#### Save it

If you want to make changes to an Excel spread sheet file you must save a copy of the file to your own computer first.

To save an XLS file you've opened in Microsoft Excel, select the File menu in Excel and then choose "Save As."

Excel will ask you to choose the folder on your computer where you want to save the file and give you an opportunity to choose a name for the file. Enter a file name that makes sense to you (be sure to keep the ".xls" file name extension so your computer will know it's an Excel file), then save the file.

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## **Adobe PDF Files**

Help topic 2107

Added or revised 06-24-2016

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PDF is the popular file format used to deliver text and graphic documents over the Internet. You can use PDF files to view, print, and distribute documents electronically. PDF stands for Portable Document Format.

PDF is the standard format used for printing reports from Volgistics. By default, when you print a report, Volgistics delivers the completed report to your Volgistics Mailbox as a PDF file. You can open, view, and print these reports using Adobe Reader.

You can also include PDF files as [attachments \[pg:0368\]](#) to the email you send to volunteers or coordinators through Volgistics.

### Reading and printing PDF files

You can use Adobe Reader to open, view, and print PDF files on both PCs and MACs. Adobe Reader is free from Adobe Systems. If it's not already installed on your computer, you can download Adobe Reader from the Adobe web site by clicking the 'Get Adobe Reader' link below.



For more information about using Adobe with your Volgistics reports read [How reports print \[pg:0446\]](#).

If you are printing mailing labels from Volgistics using Adobe Reader, be sure you have configured Adobe Reader so it does not re-size your reports when it prints them (otherwise your labels may not align properly on label sheets). There are instructions on how to do this in [help topic 2119 \[pg:0522\]](#).

For additional support with Adobe Reader please visit the Adobe web site.

### Creating PDF files

There may be times when you'd like to create PDF files yourself from documents you have on your own computer. For example, you may wish to publish a volunteer newsletter or a paper form as a PDF file so you can include it as an email attachment.

There are a number of different programs and services that you can use to create your own PDF files. Some are free, and some are included with programs you purchase. Adobe Systems ([www.adobe.com](http://www.adobe.com)), and CutePDF ([www.cutepdf.com](http://www.cutepdf.com)) are two examples, however there are many others.

### Related help

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## How to Delete a Report

Help topic 2108

Added or revised 05-13-2013

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If you have created [custom reports \[pg:0467\]](#) in your account, you can delete these if your [System Operator \[pg:0065\]](#) rights allow it. Deleting a report *cannot be undone* so if your account has more than one operator, you may want to check with the others to make sure they do not use a particular report if you're unsure. This help topic shows you how to delete a single report. See [Help Topic 1308 \[pg:0438\]](#) if you want to delete more than one report at once.

To delete a single custom report you saved previously:

1. Choose Print from the [menu \[pg:0215\]](#).

2. Click on the kind of report you want to delete. For example, Click "Volunteer List" if the report you want to delete is a volunteer list report.
3. Click on the name of the report you want to delete.\*
4. Click the **Delete it** button. If you do not see a **Delete it** button, your Volgistics [System Operator \[pg:0065\]](#) rights do not include the ability to delete reports. In this case, contact your organization's [Volgistics Administrator \[pg:0052\]](#) for further assistance.
5. Volgistics will confirm that it's OK to delete the report. Click the **OK** button if you want to proceed. The report will be deleted from your database.

You cannot delete [stock reports \[pg:0595\]](#) or [batch reports \[pg:0426\]](#).

#### \*Deleting reports for Site-Level Operators

If you have [Site Level Access \[pg:0092\]](#) turned on in your account, *or it was turned on at any point in the past*, you may have reports that were created by [Site-Level Operators \[pg:1442\]](#). By design, these reports are not visible to other Site-Level Operators. Also, by default headquarters level operators will not see these reports. If you are a headquarters level operator and you'd like to see these reports, check the "All Sites" checkbox that appears at the top right corner of the Print page.

#### Related help

[Help Topic 1308 \[pg:0438\]](#) - How to Delete Multiple Reports

[Help Topic 2223 \[pg:0467\]](#) - Creating custom reports

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## Page Design

Help topic 2110

Added or revised 01-05-2012

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The Page Design page appears when you create a new report or modify an existing report. Use the options on the Page Design page to customize the page formatting for your report.

Among the items that can be customized on this tab are Font name, Font size, and Margin width. Depending on the report type, settings such as Page size, Page orientation, Title text, Title and Logo locations, and more will be included on the Page design tab. For report-specific guidance on the Page design page, click one of the "Help" links on the top or bottom of that report's Page design page.

### Print

#### Page design

**Page design** [Help](#)

Page size:  ▾

Margin width:  (inches)

---

# Unduplicated Volunteer Count

Help topic 2115

Added or revised 01-03-2012

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Volgistics can calculate and print unduplicated volunteer counts through several different reports ([Service details](#), [\[pg:0560\] Service summary \[pg:0580\]](#)). This help topic explains what an unduplicated volunteer count is and how Volgistics calculates it.

An unduplicated volunteer count is a count of number of individual volunteers who performed volunteer service during a specified time period, regardless of how much service they performed or how frequently they served. In other words, the number of different people who served. If the same person volunteered ten times, they are still counted just once in an unduplicated volunteer count.

When you create Volgistics reports that sub-total unduplicated volunteer counts, you may find that the grand totals are not the sum of all of the sub-totals. This is normal, and the totals are all correct. It happens when the same volunteers serve in more than one area. This example illustrates this situation:

A small volunteer program has two assignments: 'Tutor,' and 'Clerical aid.' The following is the list of volunteers who served in each assignment during April 2004, and the dates they served:

## **Tutor**

Greg Anderson, April 2, 2004  
Greg Anderson, April 16, 2004  
Kisha Hendricks, April 3, 2004  
Nate Wilson, April 17, 2004  
Nate Wilson, April 27, 2004  
Barbara Norman, April 15, 2004

## **Clerical Aid**

Elizabeth O'Connor, April 2, 2004  
James Patterson, April 17, 2004  
James Patterson, April 27, 2004  
Barbara Norman, April 16, 2004  
Jason Worth, April 20, 2004

In this example, the unduplicated volunteer count for the Tutor assignment is four, even though there were six different times that volunteers served. Even though Greg Anderson and Nate Wilson each served twice during April, an unduplicated count of "April 2004 Tutor" volunteers will only count them as individuals once. So there were just four individuals who served as Tutors in April 2004.

Now look at the Clerical Aid assignment. The unduplicated volunteer count for "April 2004 Clerical Aid" volunteers is also four even though there were five different dates that volunteers served in that assignment that month, because James Patterson volunteered on two different occasions.

Now lets consider the total count of unduplicated volunteers for both assignments in April 2004. Even though the unduplicated volunteer count for each individual assignment is four, the grand total is not eight, but seven, because Barbara Norman served in both assignments. In other words, the total number of different individuals who performed service in any assignment during April 2004 was seven. They are listed here:

1. Greg Anderson
2. Kisha Hendricks
3. Nate Wilson
4. Barbara Norman
5. Elizabeth O'Connor
6. James Patterson
7. Jason Worth

Volgistics calculates unduplicated volunteer counts for the time periods you specify for your report. For example, one month, one quarter, one year, several years, etc. In otherwords, it counts the number of different individuals who served any amount of service during the period of the report.

Archived volunteers are included in unduplicated volunteer counts as long as they performed service during the period of the report, however volunteers you have deleted from Volgistics entirely are not.

Tracking unduplicated volunteer counts is an excellent way of monitoring how many different people are involved in your volunteer efforts. Managers of volunteer programs are often asked to report the number of unduplicated volunteers that serve in the organization in grant requests and annual funding reports, such as those required by many United Ways.

Note that in this example above we assumed that there was only one Greg Anderson, Nate Wilson, James Patterson, and Barbara Norman even though these names appeared more than once on the list. Of course it *is* possible for two (or more) volunteers with the same name to have service during the same period. When this happens Volgistics correctly counts them as different volunteers, because they would have different volunteer records in the database. However, if your Volgistics database accidentally includes two (or more) different volunteer records for the *same volunteer*, and each of the duplicate records had volunteer service entries for the period you are reporting, your unduplicated volunteer count would be incorrect by the number of duplicate records. This is one reason it's a good idea for you to avoid duplicate volunteer records.

#### **Related help**

[Help Topic 2308 \[pg:0471\]](#) - How do I include volunteer counts on service reports?

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## **Save**

Help topic 2133

Added or revised 02-14-2012

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The Save page appears when you create a new report or modify a custom report. Use the options on the Save page to decide who should be able to use the report in the future, whether Volgistics should print it automatically on a regular schedule, and ultimately to "Save and Print" or simply "Save" the report.

#### **What would you like to call this report?**

Enter a name for the report here. Your report name may be anything you'd like, up to 50 characters long. Choose a name that will help you remember what the report includes. For example, if your report is a list of Junior volunteers, you might name it 'Junior volunteer roster.'

#### **Which other Volgistics users should be able to use this report?**

This option appears only if your account uses the [Site Level Access \[pg:0092\]](#) features and you are not logged into Volgistics as a Site Level Operator.

#### Only those at headquarters

Choose this option if you want this report to be available for printing only to headquarters-level System Operators (System Operators who do not have a Site Level restriction).

#### Users at all Sites

Choose 'Users at all Sites' if you want all System Operators at all Sites to be able to print this report. If a Site Level Operator (a System Operator who can only access one Site) chooses to print this report, it will include only volunteers for their Site.

### **Would you like this report to run on an automatic schedule?**

You can optionally have Volgistics prepare the report for you automatically on a scheduled basis. When you choose to have a report prepared for you automatically, Volgistics generates the report overnight (at about 3:00 a.m. EST) and delivers it to your Volgistics mailbox so it's ready for you to use the following day.

This is a great feature for reports that you need on a regular basis, such as service reports you need monthly.

#### No, do not print this automatically

Choose this option if you do not want the system to prepare this report for you on an automatic schedule. When you choose this option, the report will never be printed automatically. It will be printed only when you specifically choose to print it from the Print page in the future.

#### Yes, print it on the \_\_\_ of each month

Choose this option for reports you want to print automatically once a month. Choose the day of the month (e.g. 1st, 5th, 20th, etc) on which you want the report printed automatically.

#### Yes, print it every \_\_\_\_\_

Choose this option for reports you want to print automatically once a week. Choose the day of the week (e.g. Mondays) on which you want the report printed.

#### Send it to

For reports you choose to have printed automatically, select the name of the System Operator to whom the report should be directed. The report will appear in your Volgistics mailbox to the attention of the System Operator you choose here.

#### Print it on this schedule for...

This option only appears if you use the [Site Level Access \[pg:0092\]](#) features, and if you choose to have the report printed automatically.

Choose *Headquarters only* if you want the report created just once, and delivered to the headquarters mailbox. Choose *Headquarters and all Sites* if you want the report created once for each Site, and delivered to the Volgistics mailbox at each Site.

If you choose to print the report automatically for *Headquarters and all Sites*, the copies of the report delivered to each Site will include only that Site's volunteers.

### Related help

[Help Topic 2223 \[pg:0467\]](#) - Creating custom reports

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## Formatting cells in Excel spread sheet files

Help topic 2141

Added or revised 02-10-2010

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Many of the Volgistics report formats allow you to create reports as Microsoft® Excel spread sheet files. This help topic explains how cells in Microsoft Excel spread sheet files you create in Volgistics are formatted, and how to change cell formatting to suit your needs using Microsoft Excel.

Each of the cells in an Excel spread sheet has a specific cell "format." A cell's format affects the way the information in the cell is displayed, and whether or not you can perform calculations on the information in the cell. For example, cells formatted as *Text* or *General* cannot be included in calculations until their format is changed to *Number* in Excel.

### How Volgistics sets cell formatting

Volgistics provides a series of different report formats. Each of these different report formats are listed on the Print page when you choose Print from the menu. The way cells are formatted in Excel files you create from Volgistics depends on the report format you use to create the Excel file.

The Volgistics report format called [Excel spread sheet \[pg:0513\]](#) is designed specifically for creating Excel files from your Volgistics database. When you create Excel files using the *Excel spread sheet* report, Volgistics automatically formats each of the cells for the kind of data they contain. For example, cells that contain numeric data are automatically formatted with the *number* format.

The *Excel spread sheet* report is a good tool for moving raw data from Volgistics into Excel when you want to perform additional processing or analysis outside of Volgistics.

All of the Volgistics report formats other than the *Excel spread sheet* report are designed primarily for producing printable PDF files, however most (those comprised of rows and columns) can also be used to produce Microsoft Excel spread sheet files by choosing Excel on the Include page when you run the report.

## Include

What format do you want for this report?



PDF (Adobe portable document file)



Excel (Microsoft Excel spread sheet)

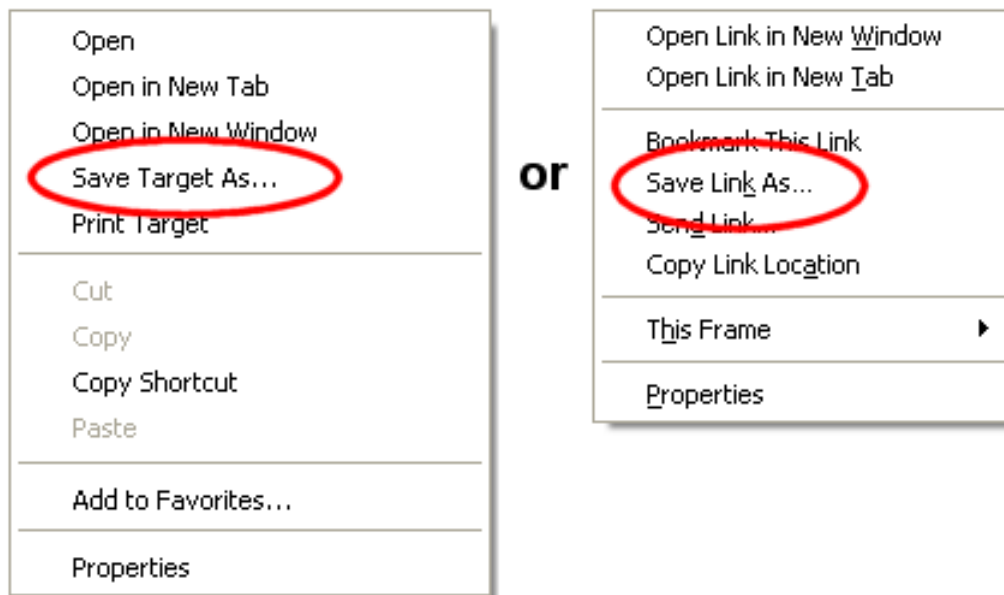


When you choose to produce Excel files using any report other than the *Excel spread sheet* report, all of the cells in the Excel file will initially have the *General* cell format. If you would like to perform calculations in Excel files you produce using these other report formats, use Microsoft Excel to set the desired cell formatting for the cells you would like to include in your calculations.

### Save the Excel file to your own computer

Before you can make changes to Excel files you create in Volgistics (including changes to cell formats) you must save a copy of the file from the Volgistics mailbox to your own computer. If you have not already done so, save a copy of the Excel file you created in Volgistics to your own computer like this:

1. Choose Mailbox from the menu.
2. On the Inbox tab, right-click on the name of the report and then choose "Save target as..." (or "Save link as") from the pop-up menu.



3. Use the "Save As" window to save a copy of the file to your desktop or to a specific folder (remember where you save the file and the file name so you can find it later).

Once you save the file to your own computer, start Microsoft Excel and open the file:

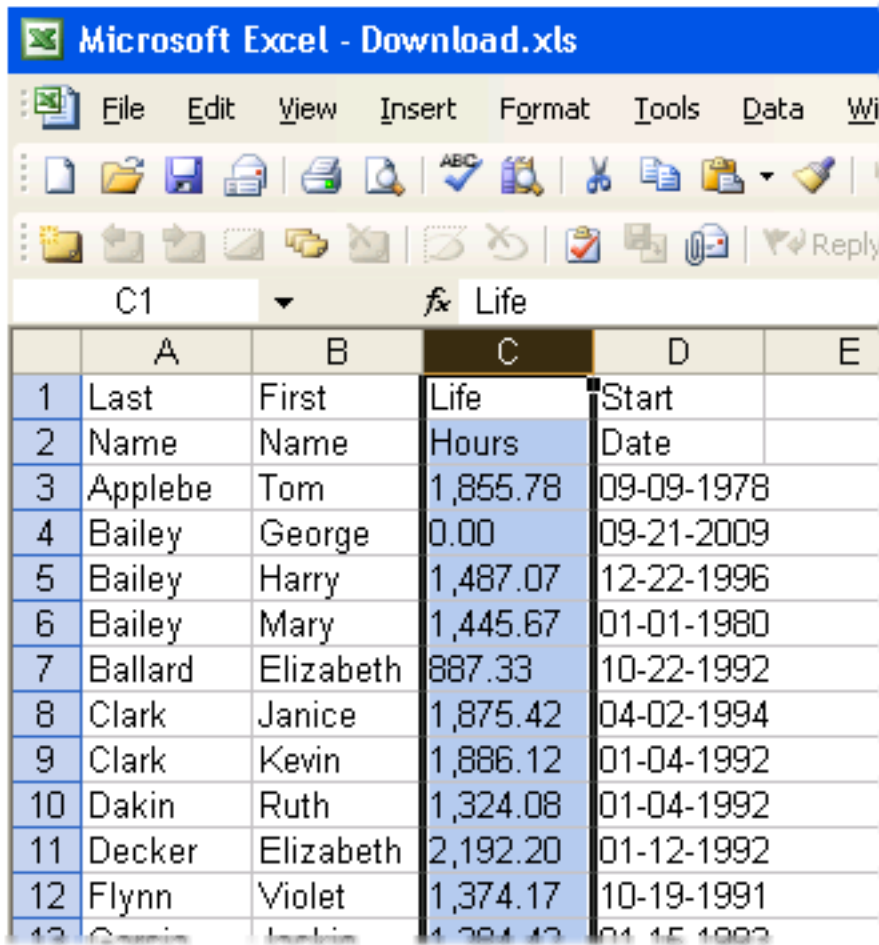
1. In Excel, choose File from the menu and then select "Open."
2. Using the Open window, locate the file you saved to your own computer.
3. Click the Open button once you've located and selected the Excel file.

### Format cells as *numbers*

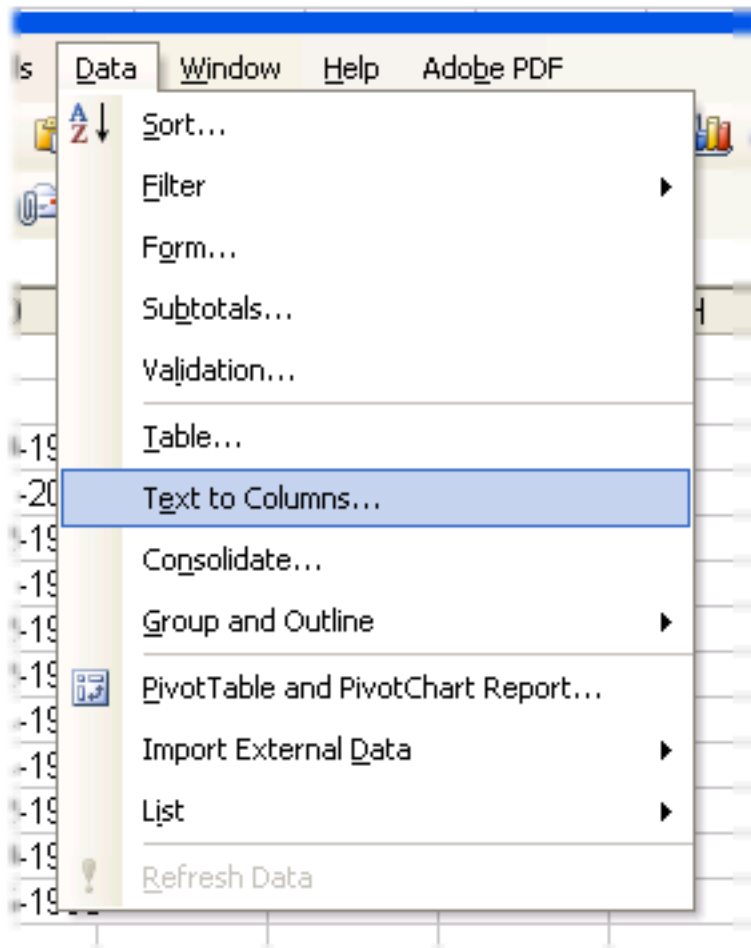
#### Change an entire column to the *number* format

If you want to perform calculations on the data in specific column, it's usually easier to change the cell formatting for the entire column (rather than changing each cell individually). To change cell formatting from *text* or *general* to *number* for an entire column:

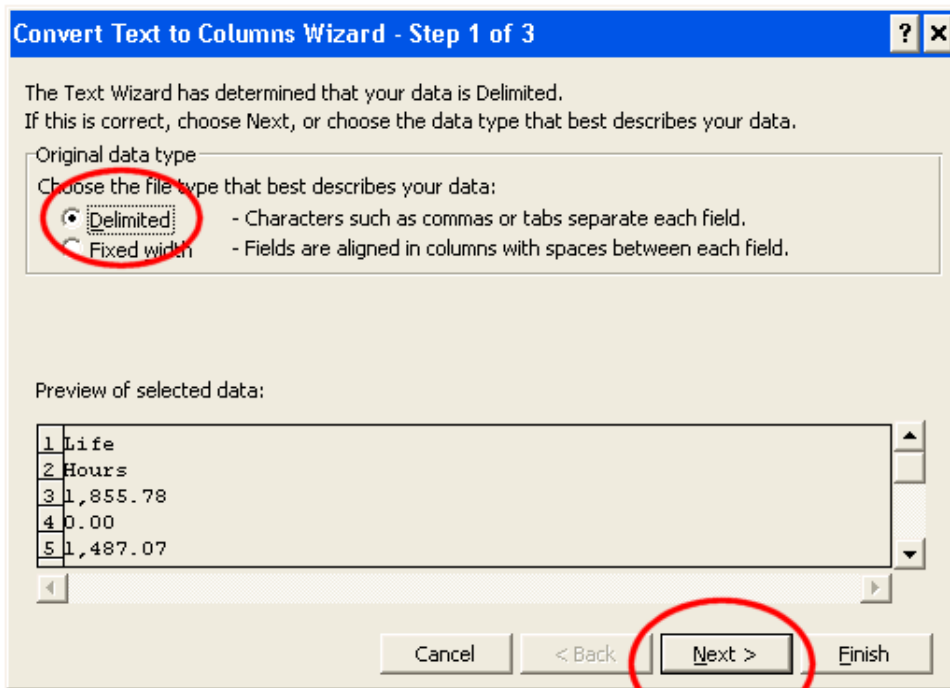
1. Select the entire column by clicking on the column heading. Be sure to select only a single column as shown here (selecting more than one single column will lead to problems):



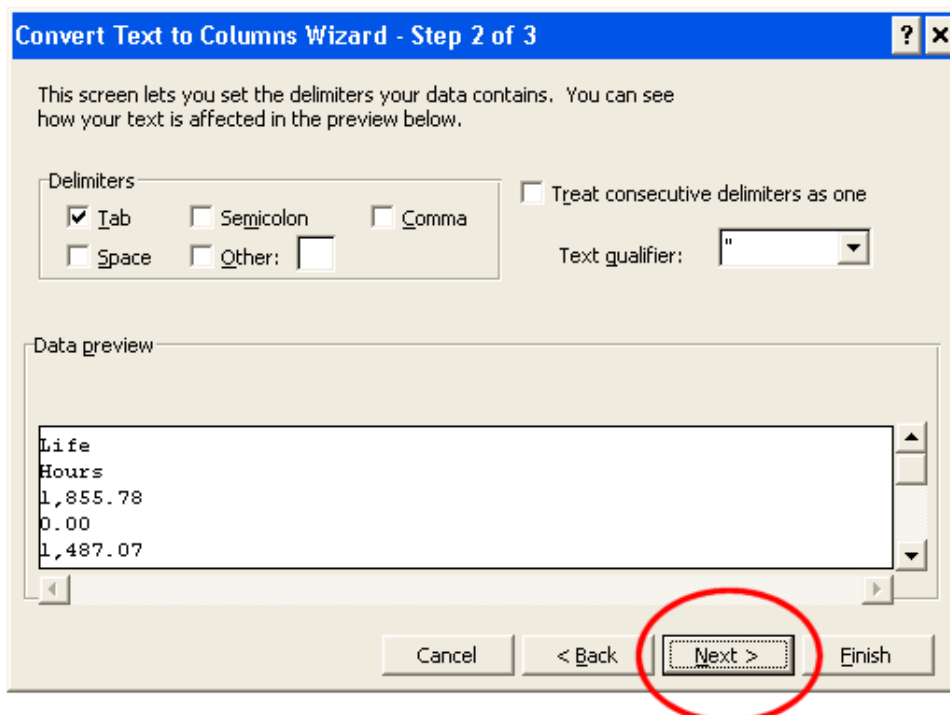
2. Select the Data menu and choose "Text to Columns..."



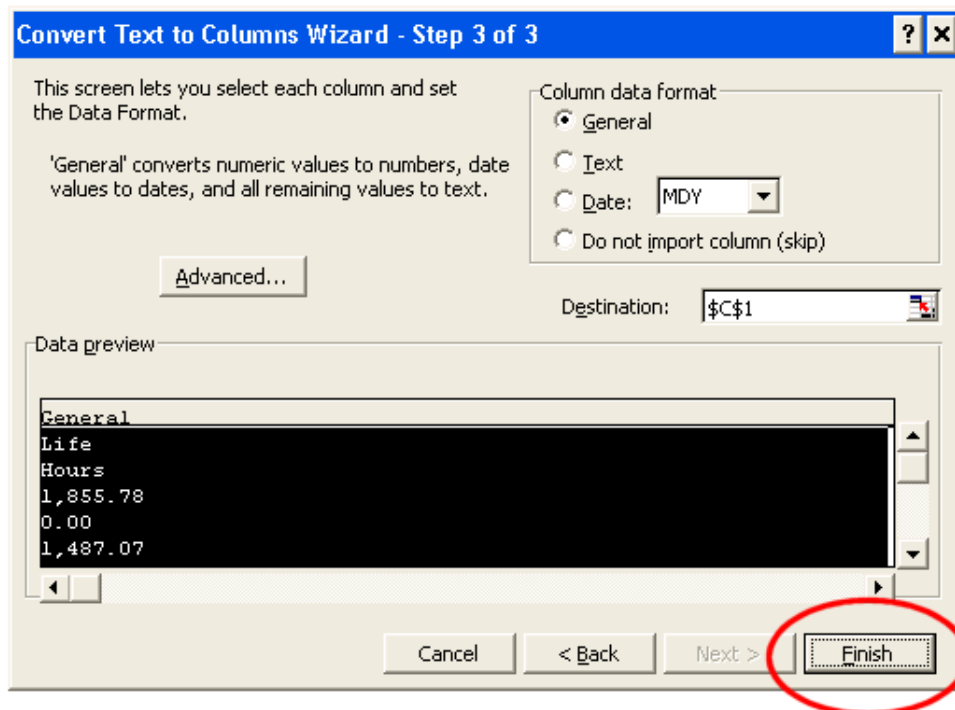
3. In the "Convert Text to Columns Wizard Step 1 of 3" window, choose "Delimited" and then click the **Next** button.



4. In the "Convert Text to Columns Wizard Step 2 of 3" window, click the **Next** button.



5. In the "Convert Text to Columns Wizard Step 3 of 3" window, click the **Finished** button.



The numeric data in the selected column will now be converted to the *number* format (you should see any numeric values in the selected column shift from left alignment to right alignment, indicating that they have changed to the *number* format).

#### Change a single cell to the *number* format

You can also change the formatting on individual cells from *text* or *general* to *number* like this:

1. Double click on the cell.
2. Press the Enter key.

The numeric data in the cell should change to the *number* format.

There are many different versions of Microsoft Excel in use, and the appearance of your version of Excel may differ somewhat from the Excel program images shown in this help topic. The steps for formatting cells in Excel are fundamentally the same for all versions of Excel, however.

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## Saving Volunteer Information Locally

Help topic 2164

Added or revised 03-03-2017

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You can use the [Excel spreadsheet \[pg:0513\]](#) report format to retrieve copies of the volunteer information you store in Volgistics. You receive your information in a standard spreadsheet file.

To save your [non-archived \[pg:0709\]](#) volunteer information to your own computer:

1. Choose Print from the [menu \[pg:0215\]](#).
2. Click "Excel spreadsheet" and then select the "All volunteer information (stock)" report.
3. Click the **Print it** button.
4. Click the **Start printing** button. It may take several minutes for Volgistics to generate your spreadsheet.
5. Select "Mailbox" from the [menu \[pg:0215\]](#).
6. Click the "All volunteer information (stock)" report once it appears in the mailbox (if the report has not appeared in your mailbox yet, click the **Refresh** button). Your browser should ask if you want to **Open** the file, or **Save** it. Select the **Save** option to save the file to your own computer.

To save your [archived \[pg:1819\]](#), or both non-archived and archived, volunteer information to your computer, modify the stock report by following these steps:

1. Choose Print from the [menu \[pg:0215\]](#).
2. Click "Excel spreadsheet" and then select the "All volunteer information (stock)" report.
3. Click the **Clone it** button.
4. On the "Options" tab, select "Only include archived volunteer records" or "Include non-archived *and* archived volunteer records."
5. On the "Save" tab, you can re-name the report if you'd like.
6. Click the **Save and Print** button and then the **Start printing** button when the "Include" tab appears.
7. Select "Mailbox" from the [menu \[pg:0215\]](#).
8. Click the "All volunteer information" report (or whatever you re-named the report to be) once it appears in the mailbox (if the report has not appeared in your mailbox yet, click the **Refresh** button). Your browser should ask if you want to **Open** the file, or **Save** it. Select the **Save** option to save the file to your own computer.

The file you create is a standard Microsoft Excel spreadsheet file. You can open and manipulate the information in this file using Microsoft Excel, or any other program that supports the XLS file format. To learn more about how Volgistics organizes your information in a spread sheet file, read [What's inside an Excel spread sheet file \[pg:0510\]](#).

## **IMPORTANT:**

Volgistics carefully safeguards the information you store and manage in the Volgistics system. When you retrieve copies of your data in spreadsheet files, Volgistics sends the files to you using [secure socket layer \(SSL\)](#) [pg:0181] protection, so they're safe on the way to you. Once you receive the file on your own computer, the security of the file is in your own hands. Be sure to protect these files appropriately. For example, do not store them on computers that may be open to the Internet. Consider using the Microsoft Excel file encryption and password protection features to protect sensitive spreadsheet files (refer to the Excel documentation for more information).

**IMPORTANT:** Organizations are welcome to periodically retrieve spreadsheet copies of the volunteer information they store and manage in the Volgistics system as a form of 'external backup.' However, these spreadsheet files are not provided as a means of making backups that you can subsequently restore to the Volgistics system. (In the case of a catastrophic emergency, Volgistics already takes care of protecting your data by making daily backups for you.) While the Volgistics Import Utility could be used to transfer some of the information from a spreadsheet file back into the system, the Import Utility does not provide a way to import data into every Volgistics field, nor update information in records that already exist in Volgistics.

### **Related help**

[Help Topic 1220](#) [pg:0437] - Print a Report for a Single Archived Volunteer

[Help Topic 2322](#) [pg:0471] - Print a Report for a Single Volunteer

[Help Topic 8040](#) [pg:0658] - All Volunteer Information (stock)

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## **My Excel Spread Sheet Report Gives Me an Error Message**

Help topic 2169

Added or revised 11-12-2013

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Microsoft Excel files (.xls) generated by Volgistics are limited to 65,536 rows. Since many organizations have thousands of volunteer records, and many of those volunteers have hundreds of service entries and notes, it is quite possible that including all of your volunteers' service and/or notes on an Excel spread sheet report will result in an error stating 'The report is no longer available' when you click on the name of the report in your Volgistics Mailbox. There are three different ways to resolve this issue:

### **Limit the date range for service records**

This will reduce the number of rows required for each volunteer record. This service range will only apply to individual volunteer service records so life hours, if included on the report, will still reflect the actual total.

This is what it would look like for 2011 on the Include tab of the report:

## Service range

This report includes volunteer service information. For what period of time would you like to include service entries?

- Include all service entries
- Only include the service entries for this period:

From: January 2011

Through: December 2011

## Separate your Excel spread sheet report

Separate your Excel spread sheet report into archived and non-archived reports. To do this:

1. Click Print from the menu
2. Choose Excel spread sheet
3. Click your report
4. Click the Clone it button
5. Choose "Only include archived volunteers"
6. Click the Save tab and type in a name for the report
7. Click Save and Print, then Start printing. The report will appear in your In Box shortly
8. Click Print from the menu
9. Choose Excel spread sheet
10. Click your original report
11. Click the Modify it button
12. Choose "Only include non-archived volunteers"
13. Click the Save tab
14. Click Save and Print, then Start printing. The report will appear in your In Box shortly

## Find a way to split your volunteers logically using Sets

For example, since you can't currently create a Set based on volunteer names, you could create a Flag for volunteers A-M and another for volunteers N-Z. You can apply these Flags to the appropriate volunteers by following the steps in help topic 2140 "[How to Permanently Mark Tagged Records](#)". [[pg:1541](#)]

You can then make two Sets based on the 'Their flags' Set rule. Help topic 2198 "[Their Flags Set Rule](#)" [[pg:0872](#)] shows how to do this.



In order to have the report generated automatically for both Sets, you would need to Clone the report and change the Include options of each report to specify a particular Set. To do this:

1. Click Print from the menu
2. Choose Excel spread sheet
3. Click your report
4. Click the Modify it button
5. Click the Include tab
6. Under "Set" check 'This Set' and choose one of your Sets from the drop down list
7. Click the Save tab, and type in a new name for this report if desired
8. Click the Save and Print button, then Start printing. The report will appear in your In Box shortly.
9. Click Print from the menu
10. Choose Excel spread sheet
11. Click your report
12. Click the Clone it button
13. Click the Include tab
14. Under "Set" check 'This Set' and choose your other Set from the drop down list
15. Click the Save tab, and type in a name for this report
16. Click the Save and Print button, then Start printing. The report will appear in your In Box shortly.

#### **Related help**

[Help Topic 2164 \[pg:0461\]](#) - Saving Volunteer Information Locally

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## **How do I make Set names print as part of report titles?**

Help topic 2206

Added or revised 01-07-2013

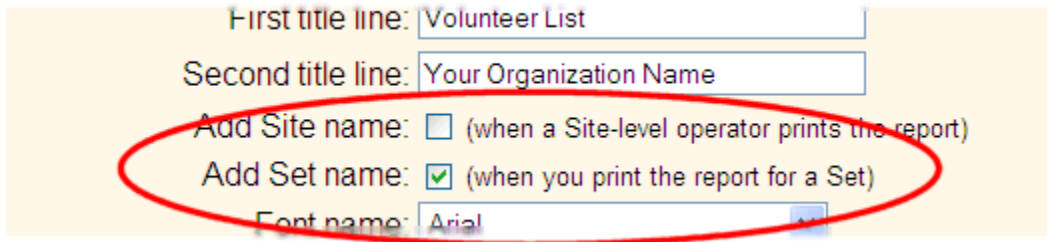
---

If you use the [Sets \[pg:0858\]](#) feature to [print reports for specific Sets of volunteers \[pg:0863\]](#), you can make the Set name appear as part of the report title. This is a good idea for 'generic' reports that you periodically print for different Sets of volunteers because it makes it easy to see which volunteers the report is for.

For example, if you have a basic 'name and address' list report that you use from time-to-time for printing different Sets of volunteers, the Set name will appear in the title each time you print the report for a specific Set. If you print the report today for a Set of volunteers you call "Seniors," then the report would include "Seniors" in the title. If you use the same report tomorrow to print a Set of volunteers you call "Employee Service League," then the report would include "Employee Service League" in the title.

To include Set names in report titles for existing reports:

1. Choose Print from the [menu \[pg:0215\]](#).
2. Select the kind of report you want to modify.
3. Click on the report name for the report you want to modify.
4. Click the **Modify it** button.
5. On the "Page design" page, check the "Add Set name" checkbox, as shown here:



The screenshot shows a form with the following fields and options:

- First title line:
- Second title line:
- Add Site name:  (when a Site-level operator prints the report)
- Add Set name:  (when you print the report for a Set)
- Font name:

A red oval highlights the "Add Set name" checkbox and its label.

6. Click the **Save** button to save your change.

To include Set names in new reports:

1. Choose Print from the [menu \[pg:0215\]](#).
2. Select the kind of report you want to create.
3. Click on the "Create a new... report" link.
4. When you get to the "Page design" page, check the "Add Set name" checkbox, as shown in the illustration above.
5. Click the **Save** button.

When you select this option for a report, a Set name will appear in the report title only when you print the report for a specific Set of volunteers (i.e. when you choose a Set from the Include page when you print the report). If you print this report, but not for a specific Set of volunteers, no Set name will appear in the report title.

---

## How do I make Site names print as part of report titles?

Help topic 2207

Added or revised 01-07-2013

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If you use the [Site Level Access \[pg:0092\]](#) features you can make Site names print as part of the report title on shared reports printed by [Site Level Operators \[pg:1442\]](#).

With Site Level Access, [stock reports \[pg:0595\]](#) - and reports created by headquarters for all Sites to use - are shared by all Site Level Operators. When a Site Level Operator prints any of these shared reports, the report title will include the Site Level Operator's *Site name* when you include Site names in report titles.

For example: if you have a Site called "Harvard Square Branch," and a Site Level Operator from this Site prints a shared report, the report will include "Harvard Square Branch" as part of the report title.

To include Site names in report titles for existing reports:

1. Choose Print from the [menu \[pg:0215\]](#).
2. Select the kind of report you want to modify.
3. Click on the report name for the report you want to modify.
4. Click the **Modify it** button.
5. On the "Page design" page, check the "Add Site name" checkbox, as shown here:

First title line:

Second title line:  Your Organization Name Northeast N  
 Insert the report's month range

Add Site name: (when a Site-level operator prints the report)

Add Set name: (when you print the report for a Set)

Font name:

6. Click the **Save** button to save your change.

To include Site names in new reports:

1. Choose Print from the [menu \[pg:0215\]](#).
2. Select the kind of report you want to create.
3. Click on the "Create a new... report" link.
4. When you get to the "Page design" page, check the "Add Site name" checkbox, as shown in the illustration above.
5. Click the **Save** button to save your changes.

When you select this option for a report, a Site name will appear in the report title only when Site Level Operators print the report. If a headquarters level operator prints the report, no Site name will appear in the report title.

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## Creating Custom Reports

Help topic 2223

Added or revised 06-20-2013

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Volgistics comes with many [Stock reports \[pg:0595\]](#) already setup that often meet basic reporting needs. In addition to these Stock reports, you can create and save your own custom reports.

To create a custom report:

1. Select Print from the [menu \[pg:0215\]](#).
2. As shown in the illustration below, the Print page lists a series of different kinds of reports, such as "Volunteer list" and "Service summary." Click on the kind of report you want to create. For example, if you want to create a volunteer list report, click "Volunteer list." Custom reports must be based on one of the kinds of reports listed on the Print page.

### Print

Choose the kind of report you want to print.  
Move your mouse over any stock report to view a sample.

#### Table Style Reports

- + Awards
- + Batch report
- + Excel spread sheet
- + Service details
- + Service summary
- + Statistics
- + Volunteer list
- + Volunteer profile

#### Label Style Reports

- + Address labels
- + Labels
- + Name tags

#### Other Reports

- + Assignment profile
- + Schedule

3. Click the "Create a new report" link.

4. Use the "Options," "Fields," "Page Design" and "Include" pages to customize your report (there's more information about these pages below). Click the **Next** button on each report setup page to advance to the next page, or the **Back** button to return to an earlier report setup page.

5. When you reach the "Save" page, enter a name for the report and then click the **Print** button.

### **Options page**

Use the Options page to set the basic report structure. The Options page provides different setup options for each different kind of report. For a more specific description of the options for the report you're creating, click the Help link on the Options page.

Click the **Next** button once you have selected your report options.

### **Fields page**

Use the Fields page to select the fields you want to appear on your report. The Field options vary depending on the kind of report you are creating. If you do not see the fields you want to select on the Fields page, try starting with a different kind of report.

The fields you select on the Fields page will appear on your report. Choose the fields you need to make your report useful, but be careful not to choose more fields than you really need. When there are many fields selected, the report may need to use a small font or extend to additional pages in order to fit them all in.

Once you have selected all the fields you need on your report, click the **Next** button.

### **Page Design page**

Use the [Page Design \[pg:0451\]](#) page to select page size, margins, and fonts, and a report title for your report. Click the **Next** button when you are finished selecting your page design.

### **Include page**

While it's possible to include all of the records in your database on the report, you may want a report that includes just certain volunteers (or just certain coordinators, sites, places, assignment, or service records; depending on the kind of report you're customizing). Use the Include page to specify which records you want to include.

The Include page provides different choices for each different kind of report. For a more specific description of the Include options for the report you're creating, click the Help link on the Include page.

When you have all your include options set, click the **Next** button.

### **Save?**

When you reach the "Save" page, enter a name for the report. Report names can be anything that will help you remember what you'll use the report for, or how the report is setup. Just select a report name that is not already used for another report.

Finally, click the **Print** button. Within moments your report will be sent to your Volgistics mailbox.

## Check your mailbox for reports

Reports you print from Volgistics are delivered to your Volgistics Mailbox, usually within just a few minutes.

To check your mailbox for reports you've printed:

1. Select Mailbox from the [menu \[pg:0215\]](#).
2. Reports appear in the "In box" by report name.
3. Click on the report name to view your report.

Volgistics delivers most reports to you in an Adobe "PDF" file format. You can view and print them using [Adobe Reader \[pg:0449\]](#).

For more information, see [How Reports Print \[pg:0446\]](#).

## To print this report again in the future

If you saved your custom report, you can print it again later as often as you'd like. To print a saved report later:

1. Choose Print from the [menu \[pg:0215\]](#).
2. Click on the kind of report you created (e.g. "Volunteer lists").
3. Click on the report name you enter above.
4. Click the **Print it** button.

## Related help

[Help Topic 2104 \[pg:0595\]](#) - Stock Reports

[Help Topic 2184 \[pg:0863\]](#) - Print a report for a set

[Help Topic 2106 \[pg:0446\]](#) - How Reports Print

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## If I archive a volunteer's record, will their hours continue to appear on reports?

Help topic 2270

Added or revised 03-03-2017

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Yes, hours for volunteer records you have [archived \[pg:1819\]](#) will continue appear in [Service Details \[pg:0560\]](#) and [Service Summary \[pg:0580\]](#) reports. In addition, the hours will still be included in the totals that appear in the [Statistics box \[pg:0028\]](#) on the Welcome page.

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## How do I print hours for a selected volunteer?

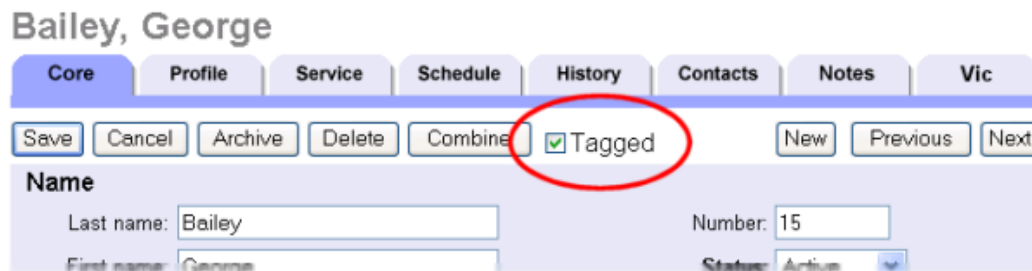
Help topic 2306

Added or revised 03-03-2017

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To print a single volunteer's hours:

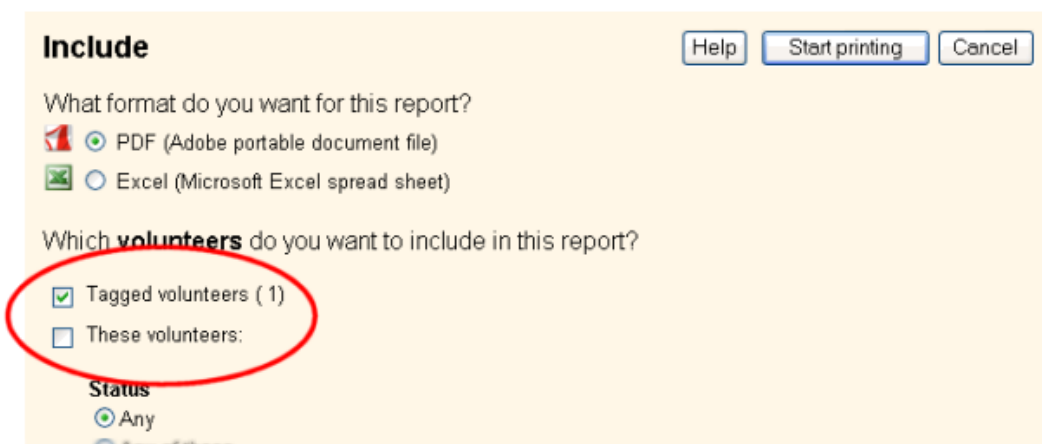
1. Select Volunteers from the [menu \[pg:0215\]](#).
2. Locate the volunteer's record.
3. Tag the volunteer's record by checking the 'Tagged' checkbox in their record.



The screenshot shows the record for Bailey, George. At the top, there are tabs for Core, Profile, Service, Schedule, History, Contacts, Notes, and Vic. Below the tabs is a row of buttons: Save, Cancel, Archive, Delete, Combine, Tagged (checked and circled in red), New, Previous, and Next. Underneath, there is a 'Name' section with input fields for Last name (Bailey), First name (George), Number (15), and Status (Active).

You can now print a service report just for the tagged volunteer. To print a list of the tagged volunteer's service:

1. Choose Print from the [menu \[pg:0215\]](#).
2. Select 'Volunteer lists.'
3. Select 'Volunteer service list (stock).'
4. Click the 'Print it' button.
5. On the "Include" page, under "Which volunteers do you want to include in this report?" check "Tagged volunteers (1)" and UN-check "These volunteers."



The screenshot shows the 'Include' dialog box. It has buttons for Help, Start printing, and Cancel. The first question is 'What format do you want for this report?' with radio buttons for PDF (Adobe portable document file) and Excel (Microsoft Excel spread sheet). The second question is 'Which **volunteers** do you want to include in this report?' with checkboxes for 'Tagged volunteers (1)' (checked and circled in red) and 'These volunteers:'. Below this is a 'Status' section with radio buttons for 'Any' and 'Any of these'.

6. Click the 'Start printing' button.

#### **Related help**

[Help Topic 1220 \[pg:0437\]](#) - Print a Report for a Single Archived Volunteer

[Help Topic 2284 \[pg:0577\]](#) - How do I print a monthly volunteer hour report?

[Help Topic 2285 \[pg:0579\]](#) - How do I print a monthly volunteer hour report by assignment?

[Help Topic 2305 \[pg:1579\]](#) - How do I view a selected volunteer's hours?

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## **How do I include volunteer counts on service reports?**

Help topic 2308

Added or revised 11-03-2006

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You can include volunteer counts on any 'Service Detail' or 'Service Summary' report. To do this:

1. Choose Print from the [menu \[pg:0215\]](#).
2. Select 'Service Details' or 'Service Summary,' depending on which kind of report you want to create. 'Service Summary' reports are best when you want to include multiple months. 'Service Detail' reports are best when you want the report to include just one month.
3. Click 'Create a new service details report,' or 'Create a new service summary report.'
4. Choose any settings you'd like from the "Options" page and then click the Next button.
5. On the "Fields" page, check "Unduplicated volunteer count," plus any other fields you'd like the report to include; and then click the Next button.
6. On the "Page Design" page make any changes you'd like and then click the Next button.
7. On the "Include" page, optionally choose the time frame and volunteers you want to include, and then click the Next button.
8. On the "Save" page enter a report name and then click the Print button.

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## **Print a Report for a Single Volunteer**

Help topic 2322

Added or revised 03-03-2017

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**Q.** How do I print a report for a single volunteer?

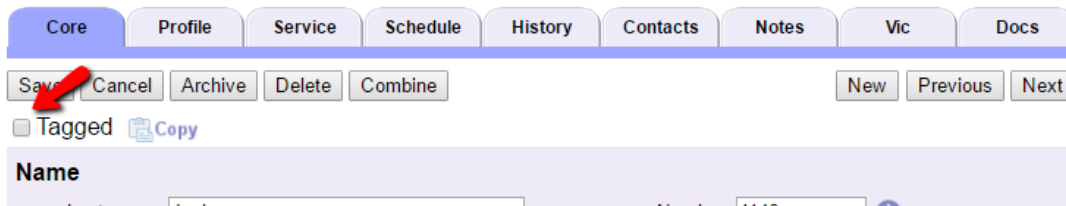
**A.** You can print any report for a single volunteer by [tagging \[pg:1529\]](#) that volunteer's record and then choosing to print a report only for the tagged volunteer record.

#### **Tag the volunteer record**

1. Choose Volunteers from the menu.



2. [Locate the volunteer's record \[pg:1982\]](#) and open it.
3. Click the *Tagged* checkbox on the volunteer's record.

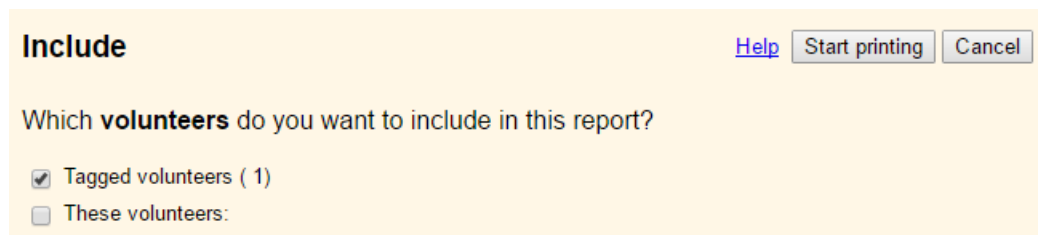


You can learn about other ways records can be tagged [here \[pg:1538\]](#).

### Print the report

You have now tagged this volunteer's record. To print a report for this volunteer only:

1. Choose Print from the menu.
2. Click on the kind of report you want to print. For example, click *Volunteer Profile*.
3. Click on the name of the report you want to print. You can learn more about stock reports that are available [here \[pg:0595\]](#).
4. Click the *Print it* button. This opens the Include tab, which is where you choose which volunteers should be included on the report.
5. On the Include tab, find the section called *Which volunteers do you want to include in this report?* Select *Tagged volunteers* and un-check *These volunteers*.



6. Click the *Start printing* button.

This will print the selected report just for the single tagged record.

### Clear the tag

When working with tags, it's always a good to clear the tags when you're finished with a task. This prevents previously tagged records from being accidentally included when you perform a task with newly tagged records. To clear the tags, choose *Tags* from the menu and then click the *Clear all tags* button.

## Tags

There are ~~currently~~ 1 tagged records

Change the **Status** of all tagged volunteer records to:

Change the **Type** of all of the tagged volunteer

### Related help

[Help Topic 1220 \[pg:0437\]](#) - Print a Report for a Single Archived Volunteer

[Help Topic 2106 \[pg:0446\]](#) - How reports print

[Help Topic 2137 \[pg:1999\]](#) - Working with Tags

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## Running Reports Automatically

Help topic 2498

Added or revised 04-19-2017

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Each Volgistics report can be printed to your Volgistics Mailbox by manually choosing to print it; however, you may also want to run certain reports on an automatic schedule. When you choose to have a report prepared for you automatically, Volgistics generates the report overnight (at about 3:00 a.m. EST), and delivers it to your Volgistics Mailbox so it's ready for you to use the following day. This can be particularly useful for monthly service reports.

In addition to printing automatically, you may want automatic reports to be sent to the attention of a specific [system operator \[pg:0065\]](#). This help topic explains how to run a report automatically, and how to set up report delivery to the Volgistics Mailbox of an operator of your choice.

First, you will need to access the report of interest. You can access a report by choosing "Print" from the main [menu \[pg:0215\]](#), choosing the report format, and then clicking the name of your report. Click the "Modify it" button, and then move to the "Save" tab.

Focus your attention on the "Would you like this report to run on an automatic schedule?" section of the Save page.

### Would you like this report to run on an automatic schedule?

*No, do not print this automatically*

This is the default option for reports. When this option is selected, a report will only be printed when an operator manually clicks on a report name and chooses to print it.

*Yes, print it on the (date) of each month*

If this report should be printed automatically once each month, select this option and choose the date it should be run automatically each month.

*Yes, print it every (day of the week)*

If this report should be printed automatically once each week, select this option and choose the day of the week it should be run each week.

### Send it to:

For reports you choose to have printed automatically, select the name of the system operator to whom the report should be directed. The report will appear in your Volgistics Mailbox to the attention of the system operator you choose here.

### Print it on this schedule for...

This option only appears if you use the [Site Level Access \[pg:0092\]](#) features, and if you choose to have the report printed automatically.

#### *Headquarters only*

Choose *Headquarters only* if you want the report created just once, and delivered to the headquarters Mailbox.

#### *Headquarters and all Sites*

Choose *Headquarters and all Sites* if you want the report created once for each Site, and delivered to the Volgistics Mailbox at each Site.

If you choose to print the report automatically for *Headquarters and all Sites*, the copies of the report delivered to each Site will include only that Site's volunteers.

The example below illustrates a report that is configured to be printed every Sunday and sent to the attention of the system operator named "Volgistics Team." This report will appear in the Mailbox at headquarters only.

**Would you like this report to run on an automatic schedule?**

No, do not print this automatically

Yes, print it on the  of each month

Yes, print it every

Send it to:

**Print it on this schedule for...**

Headquarters only

Headquarters and all Sites

### **Related help**

[Help Topic 1311 \[pg:0439\]](#) - How to Stop Automatic Reports

[Help Topic 2104 \[pg:0595\]](#) - Stock Reports

[Help Topic 2106 \[pg:0446\]](#) - How Reports Print

[Help Topic 2160 \[pg:1858\]](#) - Update Youth Volunteers upon Adulthood

[Help Topic 2133 \[pg:0453\]](#) - Save

[Help Topic 2223 \[pg:0467\]](#) - Creating Custom Reports



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## Options (Address Label Reports)

Help topic 1047

Added or revised 03-19-2013

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The

### *Options*

page appears when you create a new report or modify an existing report. Use the controls on this Options page to customize the structure of an [Address Labels \[pg:0483\]](#) report.

### **Print address labels for**

Choose the kinds records you want to print address labels for. For example, choose 'Volunteers' if you want to create mailing labels for volunteers, or 'Coordinators' if you want to print labels for Coordinators (you specify *which* volunteers or coordinators later on the Include window).

You can choose more than one kind of record for your address labels. If you want to send the same mailing to both volunteers and coordinators, for example, you can simply check both 'Volunteers' and 'Coordinators.' Your report will then include address labels for both volunteers and coordinators.

If you track different kinds of Contacts for volunteers, these are listed here also. For example, if you track 'Emergency Contacts' or 'References' on the Contact tab for your volunteers, you can optionally choose to print address labels for these kinds of contacts. If you choose to print labels for 'References' as an example, your label sheets would include address labels for the References of all of the volunteers you select on the Include window for this report. The Include window appears later in the report setup process.

### **Sort labels by**

Choose Last Name if you want your address labels sorted by last name. If you're preparing a bulk mailing you can choose to sort your labels by zip or post code. This makes it easier to organize the mailing according to the postal standards for bulk mail.

### **Other options**

#### Include Postnet bar codes

Choose 'Include Postnet bar codes' for mail sent in the US if you want these address labels to include the bar codes used by US Postal Service for automated sorting. Volgistics generates these bar codes from the recipient's zip code. They print at the top of each address label. To allow space on your labels for the bar code and the printed address, consider using labels that are more than one inch high if you include Postnet bar codes.

#### Print all uppercase

Selecting this option causes text on the address labels to print with all uppercase letters. Text prints the way it was entered in Volgistics (upper or lower case) when this option is not selected. Postal standards for some classes of bulk mail require all uppercase lettering.

#### Omit labels if the zip or post code is missing

If any of the records in your database are missing zip or post codes, the address labels printed for those records will not have a zip or post code. Selecting this option causes the report to skip any addresses that do not contain an entry in the zip or post code fields. This is useful if you are preparing a bulk mailing for which the postal service will not deliver pieces with missing zip or post codes. Note that you can eliminate the possibility of

missing zip or post codes by [making the zip or post code field required \[pg:0957\]](#).

#### Print count and date on the first label

Select this option if you want the report to show the number of labels printed. The first label will be used to show the label count, as well as the date and time the labels were printed.

#### Print lines along the edge of labels

Choose this option if you want the report to include a printed line around the edge of each label. Use this option if you're printing to plain paper to check label alignment before printing on your actual label sheets.

When you're finished choosing the Options for your report, click **Next** to continue to the next step.

#### **Related help**

[Help Topic 2223 \[pg:0467\]](#) - Creating custom reports

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## **Fields (Address Label Reports)**

Help topic 1048

Added or revised 03-18-2013

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The *Fields* page appears when you create a new report or modify an existing report. Use the Fields page to choose the fields you want to appear on this **Address Labels** report.

#### **Fixed text**

If you want all of your address labels to include the same first line of text, enter that text here. For instance, you could print labels that all have "Super Volunteer" on the first line. These labels would look like this:

Super Volunteer  
George Bailey  
123 Sycamore Street  
Bedford Falls, IN 12345

#### **Name format**

Choose the way you want names to appear on these labels:

Last name, First name (e.g. Bailey, George)  
First name Last name (e.g. George Bailey)  
Title, First name Last name (e.g. Mr. George Bailey)

#### **Optional fields for coordinator labels**

If your report includes labels for Coordinators you can optionally choose to add these additional Coordinator fields to your address labels. Check the fields you want to include.

Note: Volgistics automatically formats address labels so they include the recipient's name and address in a standard postal format. If you would like fields other than (or in addition to) name and mailing address to appear on your labels use a [Labels \[pg:0523\]](#) report instead of this 'Address labels' report.

When you're finished choosing the Fields for your report, click **Next** to continue to the next step.

#### **Related help**

[Help Topic 2223 \[pg:0467\]](#) - Creating custom reports

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## **Page Design (Address Label Reports)**

Help topic 1049

Added or revised 03-19-2013

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The Page Design page appears when you create a new report or modify an existing report. Use these options on the Page Design page to customize the size and arrangement of labels on this Address Labels report:

#### **Avery® label number**

Address labels are formatted for printing on laser or ink jet printer label sheets. If you're using Avery brand label sheets, or label sheets that list the comparable Avery stock number, select the stock number of the label sheets you intend to print on. If you do not know the stock number of your labels, or your stock number is not listed, choose 'Unknown or different brand.' Stock number 5160 is usually appropriate for the most commonly used sheet fed labels - 3 labels across by 10 labels high.

#### **Font name**

Choose the font you want to use for the text on your labels.

#### **Font size**

Choose the font size in points for the font used on your labels.

#### **Fit to label**

Depending on the size of label you're printing to, the font size you choose, and the amount of text to be printed on a particular label, it is possible that some text may extend beyond the right edge of the label. Normally, text that will not fit on a label is truncated to prevent it from overprinting the adjacent label.

Check this option if you want the report to *attempt* to make all of the text fit on the label. It does this by choosing a smaller font size for the labels where the text is too wide. Note that in some cases, the label text could still be too wide even at the smallest legible font. In these cases the excess text is still truncated.

#### **Margin around edge of individual labels**

Your labels can include a small margin around the edge of each label. Enter the size you want this margin to be, in inches (or fraction of an inch). For example, enter 0.1 if you want a margin that is 1/10th of an inch wide. This margin appears along all four sides of your labels.

#### **What style of label sheet will you print on?**

The following Page Design options appear only if you choose "Unknown or different brand" in the Avery stock number field. You can use these options to tailor your report to fit the dimensions and layout of the label sheets you intend to print on.

### Page size

Choose the page size of your label sheets.

### How many labels are in each row across the page?

Enter the number of labels there are in each row across the page.

### How many labels are in each column down the page?

Enter the number of labels there are in each column down the page.

### Side margin

Enter, in inches (or fraction of an inch), the width of the margin between the left edge of the sheet and the first column of labels.

### Top margin

Enter, in inches (or fraction of an inch), the height of the margin between the top edge of the sheet and the top of the first row of labels.

### Margin between label columns:

If your label sheets have more than one column of labels, enter, in inches (or fraction of an inch), the width of the margin between each column of labels. If there is no space between columns, enter zero.

### Margin between label rows

Enter, in inches (or fraction of an inch), the height of the margin between each row of labels. If there is no space between rows, enter zero.

### Bottom margin

Enter, in inches (or fraction of an inch), the height of the margin between the bottom edge of the sheet, and the bottom of the last row of labels.

When you're finished choosing the Page Design for your report, click **Next** to continue to the next step.

### Related Help

[Help Topic 2223 \[pg:0467\]](#) - Creating custom reports

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## **Include (Address Label Reports)**

Help topic 1050

Added or revised 03-18-2013

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The *Include* page appears when you create a new report or modify an existing report. Use the options on the Include page to choose which volunteers or coordinators you want to print address labels for.



## Skip the first \_\_\_ labels on the first sheet

This option lets you print on partially used label sheets. To print on a partially used label sheet, count the number of labels **already used** on the sheet and select that number here. Your report will begin printing on the first unused label. If your report includes more labels than remain on the sheet, they will continue printing at the first label position of the next label sheet (subsequent pages would need to be a full sheet of labels).

Choose zero to start printing at the first label position on a full sheet of labels.

## Which volunteers do you want to include in these labels?

This section appears when you print labels for volunteers, or if you chose to print labels for volunteer Contacts under [Options \[pg:0476\]](#). You use these settings to specify which volunteers, or volunteer Contacts, you want to print labels for.

### Tagged volunteers

This checkbox is disabled unless you previously tagged one or more volunteer records. Check this checkbox if you want the report to include address labels for the tagged volunteers (or their Contacts, if you included any volunteer Contacts on these labels).

### These volunteers:

Check this checkbox if you want the report to include address labels only for the volunteers you specify using the fields listed below. If you want this report to include address labels for *all* volunteers be sure to check this checkbox.

Uncheck this checkbox only if you selected the *Tagged volunteers* checkbox, and you want this report to include labels *only* for the tagged volunteers.

### Status

Choose *Any* if you want this report to include volunteers regardless of what their **current** status is.

Choose *Any of these* if you want this report to include only volunteers whose **current** status is one of those you check, then check the statuses you want to include. With this selection the report will not include all volunteers, but only the volunteers whose status matches the status checkboxes you check.

### Type

Choose *Any* if you want this report to include volunteers regardless of what their Type is.

Choose *Any of these* if you want this report to include only volunteers whose Type is one of those you check, then check the Types you want to include. With this selection the report will not include all volunteers, but only the volunteers whose Type is one of those you check.

The Type field appears in the Name box on the Core tab, and it is typically used for classifying volunteers by major program type, such as 'adult,' 'junior,' 'student,' 'regular,' 'occasional,' 'auxiliary,' and so forth.

### Kind

The Kind field is located on the Core tab in each volunteer record. It is used to show if a volunteer record is for an individual person or a [group \[pg:1909\]](#) that volunteers.

Select *Both individuals and groups* if you want the report to include both individuals and groups.

Select *Individuals only* if you want the report to only include individual volunteer records.

Select *Groups only* if you want the report to only include group volunteer records.

### Flag

Choose *Any* if you want this report to include volunteers regardless of what Flags appear on their Core tab.

Choose *Any of these* if you want this report to include only volunteers who have at least one of the Flags you check, and then check the Flags you want to include. With this selection, the report will not include all volunteers, but only the volunteers who have at least one of the Flags you check.

Flags appear in the Flag box on the Core tab for each volunteer. Flags are typically used to classify volunteers into different overlapping groups, such as 'board of directors,' 'donor,' 'sponsor,' 'day of caring,' 'red team,' and so forth.

### Site

This option appears if you use [Site Level Access \[pg:0092\]](#) in Volgistics, and you have access to the volunteer records for all Sites in your organization.

Choose *Any* if you want this report to include volunteers regardless of which Site(s) they serve at.

Choose *Any of these* if you want this report to include only volunteers who serve at least one of the Sites you check, and then check Sites you want to include. With this selection, the report will not include all volunteers, but only the volunteers who serve at least one of the Sites you check.

### **Which Coordinators do you want to include?**

This section appears when you print labels for coordinators. You use these settings to specify which coordinators you want to print labels for.

#### All coordinators

Check this option if you want labels for all of the coordinators in your database regardless of their relationship to your organization.

#### These coordinators

Check this option if you *do not* want to print labels for every coordinator, and then use the following settings to specify which coordinator to include.

#### Relationship

Choose *Any* if you want this report to include coordinators regardless of what their Relationship is to any Assignment in your database.

Choose *Any of these* if you want this report to include only coordinators whose Relationship to an Assignment is one of those you check, then check the Relationships you want to include. With this selection the report will not include all coordinators, but only the coordinators whose Relationship is one of those you check.

The Relationship field appears on the Assignment tab in the Coordinators record. It is typically used to indicate the coordinator's relationship to a specific Assignment. For example, a coordinator's Relationship to an assignment could be 'Supervisor,' 'Chairperson,' 'Team Leader,' 'Director' and so on. You can use these controls to print labels just for 'Supervisors,' just for 'Chairpersons,' and so forth.

### Position

Choose *Any* if you want this report to include coordinators regardless of what their Position is.

Choose *Any of these* if you want this report to include only coordinators whose Position is one of those you check, then check the Positions you want to include. With this selection the report will not include all coordinators, but only the coordinators whose Position is one of those you check.

When you're finished choosing the Include options for your report, click **Next** to continue to the next step.

### Related Help

[Help Topic 2223 \[pg:0467\]](#) - Creating custom reports

---

## Report Page Setup for Avery 5160 Labels

Help topic 2174

Added or revised 05-03-2007

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Report Page Setup for Avery 5160 Labels:

**Page design** [Help](#) [Back](#) [Next](#) [Cancel](#)

Avery® label number:

Font name:

Font size:   Fit text to label

Margin around edge of individual labels:  (inches)

What style of label sheet will you print on?

Page size:

How many labels are in each row **across** the page?

How many labels are in each column **down** the page?

Side margin:  (inches)

Top margin:  (inches)

Margin between label columns:  (inches)

Margin between label rows:  (inches)

Bottom margin:  (inches)

[Help](#) [Back](#) [Next](#) [Cancel](#)

## Address Label Reports

Help topic 8259

Added or revised 09-30-2016

Use Address label reports to print mailing labels for volunteers, coordinators, or volunteer contacts (such as references, employers, or emergency contacts). These reports work with sheet fed labels for laser or ink jet printers.

Address label reports include the recipient's name and mailing address in a standard postal format. For US addresses, labels may optionally include Postnet bar codes for faster postal service sorting.

Use these reports to print mailing labels for all volunteers and/or coordinators, or specify specific sets of volunteer or coordinator recipients.

Stock Address label reports:









**Coordinator address labels (stock)** [Details \[pg:0639\]](#)

Labels printed: 6 Printed: 07-23-2004 7:23 am	Mr. George Herbert 5364 Elm Street Bedford Falls, 12345	Mr. Henry Hoover 5766 Mission Avenue Bedford Falls, IN 12345
Mr. Randy Johnson 123 Elm Street Smithville, KY 36201	Ms. Betsy Peterson 7839 4th Street Mt. Pilot, IN 12345	Ms. Sally Unger 8787 1st Street Bedford Falls, 12345
Ms. Janice Watson 8787 1st Street Bedford Falls, IN 12345		

**Volunteer address labels (stock) [Details \[pg:0640\]](#)**

Labels printed: 28 Printed: 07-23-2004 7:29 am	Mr. Tom Applebe 6876 Howard Avenue Bedford Falls, IN 12345-1234	Mr. Harry Bailey 2454 Elm Street Bedford Falls, IN 12345-8912
Mrs. Mary Bailey 320 Sycamore Bedford Falls, IN 12345-9288	Mrs. Elizabeth Ballard 819 Elm Street Pottersville, IN 36102	Ms. Keshia Bennegin 612 1st Avenue Bedford Falls, IN 12345-2822
Mr. Bert Calbert 120 Elm Street Bedford Falls, IN 12345	Mrs. Janice Clark 1818 Manner Drive Bedford Falls, IN 12345-9292	Mr. Kevin Clark 7002 Second Avenue Mt. Pilot, IN 36201-2922

**Volunteer bulk mailing labels (stock) [Details \[pg:0641\]](#)**

LABELS PRINTED: 28 PRINTED: 07-23-2004 7:32 AM	 MR. ERNIE MCMURPHY 1203 SECOND STREET NORTH BEDFORD, IN 12344	 MR. BENJAMIN ROSS 817 SOUTH STREET NORTH BEDFORD, IN 12344
 MR. WALT STEVENS 7987 2ND STREET MT. PILOT, IN 12344	 MS. HARRIET GREEN 817 SOUTH STREET NORTH BEDFORD, IN 12344-2811	 MR. BERT CALBERT 120 ELM STREET BEDFORD FALLS, IN 12345
 MS. RUTH DAKIN 6712 OAK STREET BEDFORD FALLS, IN 12345	 MR. SAM WEINWRIGHT 2371 MAPLE STREET BEDFORD FALLS, IN 12345	 MS. VIOLET FLYNN 281 MAPLE STREET BEDFORD FALLS, IN 12345

If you need labels for volunteers that include fields other than (or in addition to) name and address, use a [Labels \[pg:0523\]](#) report instead.

**To create a new Address label report:**

1. Choose Print from the [menu \[pg:0215\]](#).
2. Click on "Address labels," and then click on "Create a new Address label report."
3. Customize your report using the [Options, \[pg:0476\]](#) [Fields, \[pg:0477\]](#) [Page Design, \[pg:0478\]](#) and [Include \[pg:0479\]](#) windows.

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## Options (Assignment Profile Reports)

Help topic 1192

Added or revised 05-10-2013

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The *Options* tab appears when you create a new report or modify an existing report. Use the controls on the Options tab to customize the structure of your Assignment Profile report.

### Sort by:

Choose how you would like to sort your Assignment Profile report. It can be sorted by Assignment name, Site name, Place name, Cluster name, or Assignment Status. If you do not use the [Assignment Cluster \[pg:0934\]](#) feature (or the field is hidden in your account), you will not see this option. If the Cluster field has been renamed in your account, the sort options will show the name you have given this field.

The sort options you select control the layout of the Summary Pages and the ordering of the Assignment Detail pages that follow. Here is how the Summary Pages will appear for each sort option:

#### Assignment name

This option sorts the Summary Pages with all Assignments listed alphabetically by name. If two Assignments have the same name, the Assignments are sorted alphabetically based on the name of the Site they appear under. Here is an example of how this appears on the Summary Pages when all the fields are included:

- Assignment Name [Site Name/Place Name] - Cluster Name

*Coordinator Name*

*Coordinator Name*

When inactive Assignments are included in the report, "(Inactive)" will appear directly after the name of inactive Assignments.

#### Site name

This option sorts the Summary Pages alphabetically by the name of the Site and then alphabetically by Assignment name underneath each Site. Here is an example of how this appears on the Summary Pages when all the fields are included:

Site Name

- Assignment Name [Place Name] - Cluster Name

*Coordinator Name*

*Coordinator Name*

When inactive Assignments are included in the report, "(Inactive)" will appear directly after the name of inactive Assignments.

#### Place name

This option sorts the Summary Page alphabetically by the name of the Place and then alphabetically by Assignment name underneath each Place. Here is an example of how this appears on Summary Pages when all the fields are included:

Place Name

- Assignment Name [Site Name] - Cluster Name

*Coordinator Name*

*Coordinator Name*

When inactive Assignments are included in the report, "(Inactive)" will appear directly after the name of inactive Assignments.

### **Cluster name**

This option sorts the Summary Page alphabetically by the name of the Cluster and then alphabetically by Assignment name underneath each Cluster. If the Cluster field has been renamed in your account, this option will show whatever you have named the field. If two Assignments have the same name, the Assignments are sorted alphabetically based on the name of the Site they appear under. Here is an example of how this appears on the Summary Pages when all the fields are included:

Cluster

- Assignment Name [Site Name/Place Name]

*Coordinator Name*

*Coordinator Name*

When inactive Assignments are included in the report, "(Inactive)" will appear directly after the name of inactive Assignments.

### **Assignment Status (Active/Inactive)**

This option sorts the Summary Page into Active and Inactive statuses and then alphabetically by Assignment name underneath each status. If two Assignments have the same name, the Assignments are sorted alphabetically based on the name of the Site they appear under. Here is an example of how this appears on the Summary Pages when all the fields are included:

Active

- Assignment Name [Site Name/Place Name] - Cluster Name

*Coordinator Name*

*Coordinator Name*

Inactive

- Assignment Name [Site Name/Place Name] - Cluster Name

*Coordinator Name*

*Coordinator Name*

### **If Description tab fields are blank:**

Choose whether or not you want the report to include Assignments where the fields on the Assignment's Description tab are blank. By default, the Description tab fields are named Duties, Qualifications and Directions, but these may have been renamed in your account.

All three fields must be completely blank in order for that Assignment to be omitted. For example, if the Qualifications field has text in it but the Duties and Directions fields are blank on a certain Assignment; this Assignment will still be included on the report even if you choose to omit Assignments where the fields are blank.

### **Summary Pages**

Choose whether or not you want the report to include Summary Pages. The Summary Pages include just the Site, Place, Assignment and/or Cluster information, plus Coordinator names, depending on the options you select on the Options tab and on the [Fields \[pg:0488\]](#) tab of the report.



## Include Coordinators

If Summary Pages are included, select whether or not you want the Coordinators name to be included under the Assignments they are assigned to. Even if you select not to include Coordinator names on the Summary Pages, you can still select to include Coordinator information on the Assignment Detail pages. You can learn more about Coordinator records in [Help topic 1111 \[pg:0163\]](#).

### Include *only* the Summary Page(s) in this PDF

Check this option if you only want the Summary Pages included in the Assignment Profile report. Leaving this option un-checked will make your Assignment Profile report include both Summary Pages and Assignment Detail pages.

When you're finished choosing the Options for your report, click the **Next** button to continue to the next step.

## Related help

[Help Topic 2223 \[pg:0467\]](#) - Creating custom reports

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## Fields (Assignment Profile Reports)

Help topic 1193

Added or revised 05-10-2013

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The

### *Fields*

tab appears when you create a new report or modify an existing report. Use the Fields tab to choose the fields you want to appear in your Assignment Profile report. If you selected to *only* include the Summary Pages on the [Options \[pg:0486\]](#) tab of the report, the Fields tab will only include the *General information* section because these are the only fields included in the Summary Pages.

The **Check All** and **Uncheck All** buttons can be used to select or un-select every field on the page without marking them individually.

### General information

The *General information* section controls if the Site, Place and/or Cluster name fields are included in your report. These fields appear on the Summary Pages and the Assignment Detail Pages for each assignment. So your selections here will determine what is shown in both spots where the fields appear in the report. If you have renamed the Cluster field in your account, this name will appear as the selection option.

The Site and Place fields are used to set the hierarchy for the Assignments in your account. You can learn more about this in [Help topic 2099 \[pg:0096\]](#).

The Cluster field is used to add additional tracking for Assignments across Sites and Places. If the Cluster field is hidden in your account, or you do not have any Assignment Clusters created, the option to select this field will not appear. You can learn more about how to setup and use Assignment Clusters in [Help topic 1114 \[pg:0934\]](#).

### Assignment tab fields

Check the fields of information about each Assignment that you want to include in your Assignment Profile report. [Help topic 2215 \[pg:0106\]](#) has information on creating Assignments if you need help.

The fields in the Detail section will not appear if they are set to "Hidden," or are not setup yet in your account. To setup and un-hide these fields, select Setup from the menu, expand the *Field options* link, and select *Assignment tab*.

### Coordinator tab fields

Check the fields for the Coordinator information that you want to include. [Help topic 1111 \[pg:0163\]](#) has information on adding Coordinator records if you need help.

The fields in the *Coordinator relationship fields* section will not appear if they are set to "Hidden," or are not setup yet in your account. To setup and un-hide these fields, select Setup from the menu, expand the *Field options* link, and select *Coordinator fields*. The *Coordinator relationship fields* appear on both the Coordinators tab of Assignment records and on the Assignments tab of Coordinator records.

### Profile tab fields

Check the fields on the Assignment Profile tab that you want included in the report.

You setup the *Time Needed* fields that appear on this tab by selecting Setup from the menu, expanding the *Field options* link, and selecting *Profile tab (for assignments)*. The availability fields for assignments are shared with the availability fields for volunteers, so changing the settings on the Assignment Profile tab will also change the settings on the volunteer Profile tab.

Characteristics are setup by following the directions in [Help topic 1157 \[pg:0938\]](#). The fields will appear as options to select for your report as long as the setup options for the Characteristic field are set to have the field appear on the Profile tab for volunteers *and* Assignments, or just the Assignment Profile tab. They will not appear if the field is setup to only appear on the volunteer Profile tab.

### Description tab fields

Select the fields on the Assignment Description tab that you want to have included in the report. Please note, if these fields are blank for certain Assignments and you do not want these Assignments included on the report, you can control whether or not they are included on the [Options \[pg:0486\]](#) tab of the report.

When you're finished choosing the Fields for your report, click the **Next** button to continue to the next step.

### Related help

[Help Topic 2223 \[pg:0467\]](#) - Creating custom reports

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## Page Design (Assignment Profile Reports)

Help topic 1194

Added or revised 04-12-2013

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The Page Design page appears when you create a new report or modify an existing report. Use the options on the Page Design page to customize the page formatting for your Assignment Profile report.

### Page size

Use the dropdown list to choose the paper size for this report. The default page size is "Letter."

## Margin width

Enter the size (in inches) of the margin you want to appear around the edge of the page. The default margin width is one half inch (0.5 inches). The largest margin that can be selected is one and one-half inches (1.5 inches). If a number larger than 1.5 is entered, the default margin is used.

## Page orientation

Choose the way you would like the pages of the report to be oriented, portrait or landscape. The default setting is portrait.

## First title line

The first title line of the Assignment Detail pages of Assignment Profile reports will always show the name of the Assignment.

## Second title line

The default selection is your organization's name. If you'd like something different to appear on the report, delete your organization's name and type what you want to appear as the second line of the report's title.

## Font name

Use the dropdown list to choose the name of the font you would like Volgistics to use for printing the report title. The default font is Arial.

## Logo & title locations

Use the dropdown list to choose the way you would like to arrange your organization's logo and the report title at the top of the page. The default setting has the logo on the left and the title on the right.

You may include your organization's logo if you installed a logo graphic file in your Volgistics account setup. [How to Upload Logo Graphics \[pg:1353\]](#) shows how to do this if you need help.

## Body font name

Use the dropdown list to choose the font style for the text in the body of the report. The body of the report includes all of the report content except the report title. The default font is Arial.

## Lines

Your report can include lines around the borders of the report. Choose *On* if you want this report to include lines, or *Off* if you prefer no lines. This option does not affect the content of the report except by adding or removing the line graphics. The default setting is on.

You can also select the color of the lines by clicking on one of the color choices available. The default color is black.

## Date and time printed

Choose *On* if you want this report to include the date and time the report was printed in the lower left corner of each page. Choose *Off* if you prefer not to have the date and time printed. The default setting is on.

## Page numbers

Choose *On* if you want page numbers printed at the bottom of each page. Choose *Off* if you prefer not to have page numbers printed. The default setting is on.

When you're finished choosing the page design for your report, click **Next** to continue to the next step.

#### **Related help**

[Help Topic 2223 \[pg:0467\]](#) - Creating custom reports

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## **Include (Assignment Profile Reports)**

Help topic 1195

Added or revised 05-10-2013

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Use the Include page to choose which Assignments the Assignment Profile report will cover.

### **Which Assignments do you want to include in this report?**

Use the radio buttons to select the Assignments that will be included in the report. You can also select if the report will include active and/or *inactive Assignments* [\[pg:0140\]](#).

#### All Assignments

This will print the report for all Assignments in your account depending on the selections in the *Active and Inactive Assignments* section.

#### Only include this Assignment - or Assignment(s) from this Site or Place:

Use the dropdown list to limit the report to just the Site, Place or Assignment you select. Please see [Help topic 2099 \[pg:0096\]](#) if you need more information on Sites, Places and Assignments.

The Assignments included will also depend on your selections in the *Active and Inactive Assignments* section.

#### Only include Assignments with this Coordinator:

Use the dropdown list to limit the report to just Assignments that are assigned to a particular Coordinator. If you do not have any Coordinator records in your account, you will not see this option. Please see [Help topic 1111 \[pg:0163\]](#) if you need more information on Coordinators.

The Assignments included will also depend on your selections in the *Active and Inactive Assignments* section.

#### Only include Assignments in this Cluster:

Use the dropdown list to limit the report to just Assignments that are linked to a particular Assignment Cluster. If the Cluster field has been renamed in your account, the name you gave to this field is shown. If you do not have any Assignment Clusters setup in your account, you will not see this option. Please see [Help topic 1114 \[pg:0934\]](#) if you need more information on Assignment Clusters.

The Assignments included will also depend on your selections in the *Active and Inactive Assignments* section.

### **Active and Inactive Assignments**

## Active Assignments

Check the Active checkbox if you want the report to contain information for Assignments that have the Active status in your account. The default setting is checked.

## Inactive Assignments

Check the Inactive checkbox if you want the report to contain information for Assignments that have the **Inactive status** [\[pg:0140\]](#) in your account.

When you're finished choosing the include options for your report, click the **Next** button to continue to the next step.

### **Related help**

[Help Topic 2223 \[pg:0467\]](#) - Creating custom reports

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## **Assignment Profile Reports**

Help topic 8263

Added or revised 04-17-2013

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Assignment Profile reports provide a way for you to print information about the **Assignments** [\[pg:0096\]](#) you have in your account. The finished report will have optional Summary Pages outlining the information included in the report and/or Assignment Detail Pages for each Assignment depending on the options you choose when you create the report. The Assignment Profile reports are currently only available in **PDF** [\[pg:0449\]](#) format.

### **Summary Pages**

Here is an example of how the Summary Pages of your report may look. The layout of your Summary Pages may appear different depending on how you select to sort the report and the fields you select to include. You can find out more about selecting the options for the Summary Pages, and how they will appear depending on your selections, in [Help topic 1192 \[pg:0486\]](#).

## Summary of Sites, Places, Assignments, and Clusters Sorted by Place

### Administration

- Advisory Council [Main Hospital] - Administration  
*Kevin Atkins*
- Board Meeting [Main Hospital] - Administration  
*Kevin Atkins*
- Department Assistant [Main Hospital] - Clerical
- Patient Advocate [Main Hospital] - Patient Care Assignments  
*Stephanie Saunders*
- Special Projects (Inactive) [Main Hospital] - Special Projects  
*Arlene Rogers*

### Community Education

- Diabetes Clinic Office Assistant [Main Hospital] - Clerical  
*Stephanie Saunders*
- Orientation [Main Hospital] - Volunteer Services  
*Arnold Cabrera*
- Workshops [Main Hospital] - Volunteer Services  
*Arnold Cabrera*

### Emergency Department

- Emergency Department [Main Hospital] - Patient Care Assignments  
*Stephanie Saunders*

### Gift Shop

- Gift Shop Helper [Main Hospital] - Gift Shop
- Gift Shop Manager [Main Hospital] - Gift Shop

### Heart Center

- Cardiovascular Waiting Room [Heart Center] - Recovery  
*Kathleen Banks*
- Information Desk [Heart Center] - Information & Reception Desks  
*Felton Marcella*

### Info Desk

- North Lobby Desk [Main Hospital] - Information & Reception Desks  
*Felton Marcella*
- Skywalk Desk [Main Hospital] - Information & Reception Desks  
*Felton Marcella*
- Tour Guides [Main Hospital] - Public Relations  
*Philip Cole*
- Welcome Center Desk [Main Hospital] - Information & Reception Desks  
*Felton Marcella*

### Mail Room

- Mail Delivery [Main Hospital] - Mail Room  
*Marvin Johnston*

### Patient Escorts

- Greeters [Main Hospital] - Volunteer Services  
*Arnold Cabrera*  
*Georgette Lopez*  
*Stephanie Saunders*
- No One Dies Alone [Main Hospital] - Hospice

## Assignment Detail Pages

Your report may also have Assignment Detail Pages that show more information about each Assignment. Here is an example of how an Assignment Detail page may appear. You can find out more about how to include different fields of information in your report in [Help topic 1193 \[pg:0488\]](#).

## Laboratory Services Reception Desk

Your Agency Name

	At a Glance																																
<p><b>Duties</b> The volunteer provides staffing for the Laboratory Services reception desk in the mornings on Monday through Friday, afternoons on Monday through Thursday, and on Tuesday and Thursday evenings. Duties include providing general information, assisting visitors with special needs, and checking in patients when they arrive.</p> <p><b>Qualifications</b> The volunteer must have ability to communicate courteously and effectively with patients, families, visitors and staff. Fluency in foreign languages and/or sign language is a plus, but is not required.</p> <p>Volunteer must conduct themselves in a responsible and caring manner at all times, while maintaining strict confidentiality.</p> <p>Commitment to at least one 4 hour shift (Monday - Thursday morning) is desired.</p> <p><b>Directions</b> Please see page 355 of the "Policy and Procedures" manual, or contact the assignment Coordinator, if you need additional assistance while on duty.</p> <p><b>Additional Requirements / Information</b> Accounting Code: 45881 D.S.S. Level: 1-B</p> <p>Last Compliance Review: 02-20-2012 Next Compliance Review: 02-20-2014</p> <p>Patient contact HIPAA Required</p> <p><b>Characteristics</b> <b>Skills &amp; Interests</b> Computer - Basic                      Data Entry Office Work                              Telephone Answering</p> <p><b>Characteristics</b> <b>Languages</b> American Sign                      English Spanish</p> <p><b>Coordinators for this Assignment</b> • Mrs. Felton Marcella 2699 Wood Street Saginaw MI 48607</p>	<p><b>Assignment Status:</b> Active</p> <p><b>Site / Place:</b> Main Hospital / Reception</p> <p><b>Cluster name:</b> Information &amp; Reception Desks</p> <p><b>Advertise:</b> Yes</p> <p><b>Sign-in Option:</b> Yes</p> <p><b>Schedule Reminders:</b> Yes</p> <p><b>Availability Needed:</b> Ongoing</p> <p><b>Volunteers Serve Up To:</b> 4 hours daily</p> <p><b>Times Needed:</b></p> <table border="1" style="margin-left: auto; margin-right: auto;"> <thead> <tr> <th></th> <th style="font-size: small;">Morning</th> <th style="font-size: small;">Afternoon</th> <th style="font-size: small;">Evening</th> </tr> </thead> <tbody> <tr><td>Sun</td><td></td><td></td><td></td></tr> <tr><td>Mon</td><td>X</td><td>X</td><td></td></tr> <tr><td>Tue</td><td>X</td><td>X</td><td>X</td></tr> <tr><td>Wed</td><td>X</td><td>X</td><td></td></tr> <tr><td>Thu</td><td>X</td><td>X</td><td>X</td></tr> <tr><td>Fri</td><td>X</td><td></td><td></td></tr> <tr><td>Sat</td><td></td><td></td><td></td></tr> </tbody> </table> <p><b>Minimum Age:</b> 18</p> <p><b>Address and Contact Info:</b> 456 Your Street Address Room 015 - Basement Level Your City, MI 49315</p> <p>(555) 555-5583 (Work) (555) 555-0505 (Fax)</p>		Morning	Afternoon	Evening	Sun				Mon	X	X		Tue	X	X	X	Wed	X	X		Thu	X	X	X	Fri	X			Sat			
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### Create a custom Assignment Profile Report

To create a [custom \[pg:0467\]](#) Assignment Profile report, please follow these steps:

1. Select Print from the [menu \[pg:0215\]](#).
2. Expand the "Assignment profile" link.
3. Select "Create a new assignment profile report."
4. Select how you would like your report arranged and the options for Summary Pages on the Options tab. You can find out more about the settings on this tab in [Help topic 1192 \[pg:0486\]](#).
5. Select the fields of information you want in the report on the Fields tab. You can find out more about the settings on this tab in [Help topic 1193 \[pg:0488\]](#).
6. Select page layout options for your report on the Page Design tab. You can find out more about the settings on this tab in [Help topic 1194 \[pg:0489\]](#).
7. Select which assignments you want the report to include on the Include tab. You can find out more about the settings on this tab in [Help topic 1195 \[pg:0491\]](#).


8. Save and name the report on the Save tab before running it. [Help topic 2133 \[pg:0453\]](#) explains more about the settings on this tab.

Your finished report will appear on the [In Box \[pg:0303\]](#) tab of your Volgistics Mailbox.

### Stock Assignment Profile Reports

The Assignment Profile reports come with three [stock \[pg:0595\]](#) reports designed to meet common needs. You can print stock reports by selecting the name of the report and then clicking the **Print it** button. If the stock report almost meets your needs but you would like to modify it slightly, click the **Clone it** button to "spin off" a copy of the report. Or, you can create a custom report by following the steps in the *Create a custom Assignment Profile Report* section above.

[Assignment Description Sheets \(stock\) Details \[pg:0670\]](#)



Sample  
Organization Name

## CIMT Assistant

Assignment Description Sheets

**Duties**  
Volunteers assist the medical staff in basic operations for the Constraint Induced Movement Therapy (CIMT) room. Responsibilities range from stocking rooms, ordering and checking in orders, and inventory control. More advanced volunteers may assist with patient care when appropriate. However, no medical knowledge required.

**Qualifications**  
The volunteer must have the ability to communicate courteously and effectively with patients, families, visitors and staff. Fluency in foreign languages and/or sign language is a plus, but is not required.

The volunteer must conduct themselves in a responsible and caring manner at all times and maintain strict confidentiality.

While no medical knowledge is required, it is a positive while serving in this position. Volunteers who are attending college, or receiving training in a medical specialty, are encouraged to serve in this capacity as this position provides an excellent reference for future employment.

Commitment to at least one weekly 3 hour shift (Monday, Tuesday or Wednesday) is desired.

**Directions**  
Please see page 501 of the "Policy and Procedures" manual, or contact the assignment Coordinator, if you need additional assistance while on duty.

**Additional Requirements / Information**  
Accounting Category: SD2  
CWR Level: 2  
\*\*SDS Location: Department Office

**At a Glance**

Availability Needed:  
Ongoing

Volunteers Serve Up To:  
36 hours monthly

Times Needed:

	8am - 8am	8am - 10am	10am - noon	noon - 2pm	2pm - 4pm	4pm - 6pm	6pm - 8pm	8pm - 10pm
Sun								
Mon	X	X	X	X				
Tue	X	X	X	X	X	X		
Wed	X	X	X	X	X	X		
Thu	X	X	X	X				
Fri								
Sat								

Minimum Age:  
18

Address

[Assignment List \(stock\) Details \[pg:0671\]](#)



## Summary of Sites, Places, and Assignments Sorted by Site

### Heart Center

- Cardiovascular Waiting Room [Heart Center]  
Kathleen Banks
- Information Desk [Heart Center]  
Felton Marcella

### Main Hospital

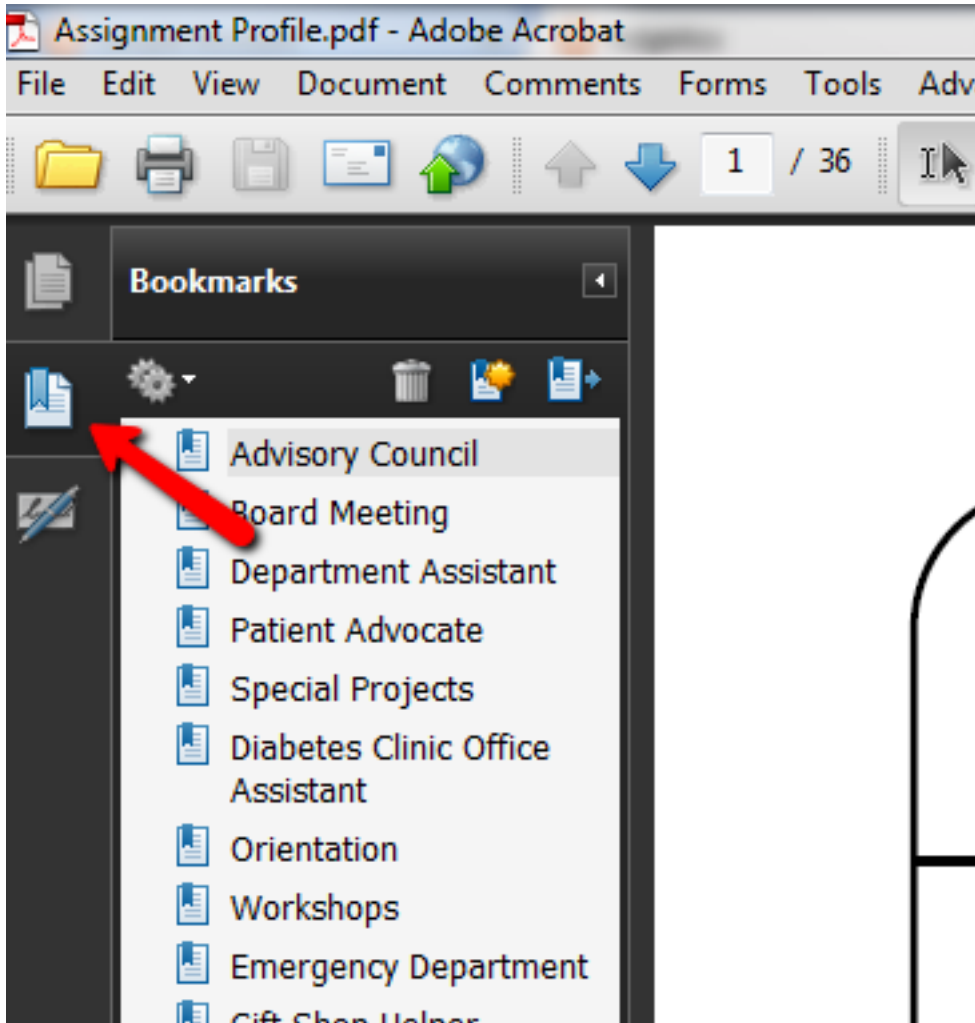
- Advisory Council [Administration]  
Kevin Atkins
- Board Meeting [Administration]  
Kevin Atkins
- Department Assistant [Administration]
- Patient Advocate [Administration]  
Stephanie Saunders
- Special Projects [Administration]  
Arlene Rogers
- Diabetes Clinic Office Assistant [Community Education]  
Stephanie Saunders
- Orientation [Community Education]  
Arnold Cabrera
- Workshops [Community Education]  
Arnold Cabrera
- Emergency Department [Emergency Department]  
Stephanie Saunders
- Gift Shop Helper [Gift Shop]
- Gift Shop Manager [Gift Shop]
- North Lobby Desk [Info Desk]  
Felton Marcella
- Skywalk Desk [Info Desk]  
Felton Marcella
- Tour Guides [Info Desk]  
Philip Cole
- Welcome Center Desk [Info Desk]

[Coordinator Contact List \(stock\) Details \[pg:0672\]](#)

	<b>Greeters</b> Coordinator Contact List
<b>Coordinators for this Assignment</b>	<b>At a Glance</b>
<ul style="list-style-type: none"> <li>• Mr. Arnold Cabrera            1153 Robinson Court            Ashley MI 48806             Email: arnoldcabrera@mailinator.com            Work: (989) 320-8811            Cell: (989) 400-9845            Pager: (873) 229-3331</li> </ul>	<b>Site / Place:</b> Main Hospital / Patient Escorts  <b>Address and Contact Info:</b> 456 Your Street Address Report to Welcome Center Your City, MI 49315
<ul style="list-style-type: none"> <li>• Ms. Georgette Lopez            3957 Bartlett Avenue            P.O. Box 3880            Detroit MI 48226             Email: georgette.lopez@spambob.com            Cell: (248) 506-6087            Pager: (592) 389-1105</li> </ul>	(555) 555-5555 (Work) (555) 555-5558 (Fax)
<ul style="list-style-type: none"> <li>• Ms. Stephanie Saunders            2369 Shingleton Road            Colon MI 49040             Email: stevensaunders@trashymail.com            Cell: (269) 432-4377</li> </ul>	

### Navigate to Assignment Detail Pages with Bookmarks

When your Assignment Profile report includes Assignment Detail Pages and is opened using [Adobe Reader](#) [pg:0449], you can use Adobe's Bookmarks feature to go directly to the Assignment Detail page for a particular assignment.



Most web browsers open PDF files using Adobe Reader by default. However, the Google Chrome browser opens PDF files using a built-in viewer instead of Adobe Reader. This means you will either need to save the files to your local computer and open them from there using Adobe Reader, or disable the built-in viewer so files open with Adobe Reader. [Help topic 2176 \[pg:1606\]](#) has information on how to do this under the "Chrome will not open PDF documents from the Volgistics mailbox" heading.

#### **Related help**

[Help Topic 2223 \[pg:0467\]](#) - Creating custom reports

---

## Options (Award Reports)

Help topic 1065

Added or revised 03-19-2013

---

The *Options* page appears when you create a new report or modify an existing report. Use the controls on this Options page to customize the structure of an **Awards** report.

### List volunteers who are:

The Options page lets system operators choose to include eligible volunteers and/or volunteers with any or all of the Notation entries defined for Award dates (for example, "Nominated" or "Presented").

#### Eligible (meet the award criteria)

Choose this option if your Award report should include the volunteers who currently meet the eligibility criteria defined during the initial [Award setup \[pg:0909\]](#) process.

Any specific Notations your organization applies to Award dates will be listed here as well. Mark the box for any of the Award date Notations to list volunteers with that Notation.

### Sort volunteers by:

#### Name

Choose this option to sort volunteers alphabetically by name under each Award.

#### Number

Choose this option to sort volunteers by (ascending) volunteer number under each Award.

### Other options:

#### Blank row after each volunteer

Mark this option to increase the white space in a report by inserting a blank row after each volunteer.

#### Include volunteer counts for each award

Choose this option to generate the number of volunteers listed for each Award.

#### Start a new page for each award

Choose this option to begin a separate page for each Award.

When you're finished choosing the Options for your report, click **Next** to continue to the next step.

### Related help

[Help Topic 2223 \[pg:0467\]](#) - Creating custom reports

---

## Fields (Award Reports)

Help topic 1084

Added or revised 03-19-2013

---

The *Fields* page appears when you create a new report or modify an existing report. Use the Fields page to choose the fields you want to appear on an **Awards** report.

Mark the boxes next to each field you want to appear on the Awards report for each volunteer. Your report will include a column for each item you select. For example, if an organization needed to see only the names of volunteers listed for each Award, the system operator creating the report would mark only the boxes for name fields. If, however, an organization also wanted to see each volunteer's Status and Flags, they would additionally mark the Status and Flags field boxes on the Fields page.

Since each field becomes a report column, fields should be chosen sparingly. If more columns than can fit legibly from left to right on a page are included, Volgistics automatically extends the report to additional pages *right* before starting the next page *down*.

When you're finished choosing the Fields for your report, click **Next** to continue to the next step.

### Related help

[Help Topic 2223 \[pg:0467\]](#) - Creating custom reports

---

## Include (Award Reports)

Help topic 1090

Added or revised 10-02-2014

---

The *Include* page appears when you create a new report or modify an existing report. Use the options on the Include page to choose which volunteers you want to *include* in this **Awards** report. You can also choose the report's file format (PDF or Excel) on this page.

### What format do you want for this report?

You can choose to create this report as either an Adobe PDF file, or as an Excel spread sheet file. Use this control to make this choice.

Choose "PDF" if you would like your report returned to you as an Adobe 'portable document' file. You can use Adobe reader to view and print your report.

Choose "Excel" if you would like your report returned to you as an Excel spread sheet file. You can use Microsoft Excel (or other spread sheet programs) to view and print the report.

### Which volunteers do you want to include in this report?

Choose which volunteers you want to appear on this report.

#### Tagged volunteers

This checkbox is disabled unless you previously [tagged \[pg:1529\]](#) one or more volunteer records. Check this checkbox if you want the report to include the tagged volunteers.

### These volunteers:

Check this checkbox if you want the report to include **all** volunteers, or just the volunteers you specify using the following controls: (uncheck this checkbox only if you selected the *Tagged volunteers* checkbox and you want this report to include *only* the tagged volunteers).

### Status

Choose *Any* if you want this report to include volunteers regardless of what their **current** status is.

Choose *Any of these* if you want this report to include volunteers whose **current** status is one of those you check, then check the statuses you want to include.

### Type

Choose *Any* if you want this report to include volunteers regardless of what their Type is.

Choose *Any of these* if you want this report to include only volunteers whose Type is one of those you check, then check the Types you want to include.

The Type field appears in the Name box on the **Core tab** [pg:1868], and it is typically used for classifying volunteers by major program type, such as 'adult,' 'junior,' 'student,' 'regular,' 'occasional,' 'auxiliary,' and so forth.

### Kind

The Kind field is located on the Core tab in each volunteer record. It is used to show if a volunteer record is for an individual person or a **group** [pg:1909] that volunteers.

Select *Both individuals and groups* if you want the report to include both individuals and groups.

Select *Individuals only* if you want the report to only include individual volunteer records.

Select *Groups only* if you want the report to only include group volunteer records.

### Flag

Choose *Any* if you want this report to include volunteers regardless of what Flags appear on their Core tab.

Choose *Any of these* if you want this report to include only volunteers who have at least one of the Flags you check, then check the Flags you want to include.

Flags appear in the Flag box on the **Core tab** [pg:1868] for each volunteer. Flags are typically used to classify volunteers into different overlapping groups, such as 'board of directors,' 'donor,' 'sponsor,' 'day of caring,' 'red team,' and so forth.

### Site

This option appears if you use **Site Level Access** [pg:0092] in Volgistics, and you have access to the volunteer records for all Sites in your organization.

Choose *Any* if you want this report to include volunteers regardless of which Sites they serve at.

Choose *Any of these* if you want this report to include only volunteers who serve at at least one of the Sites you check, then check Sites you want to include.

## Set

Check this option, and then select a [Set \[pg:0858\]](#) if you want this report to include only the volunteers in a certain Set.

When you're finished choosing the Include options for your report click **Next** to continue to the next step.

### **Related help**

[Help Topic 2223 \[pg:0467\]](#) - Creating custom reports

---

## **Page design (Award Reports)**

Help topic 1121

Added or revised 03-19-2013

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The Page Design page appears when you create a new report or modify an existing report. Use the options on the Page Design page to customize the page formatting for your Awards report.

### **Page size**

Use the drop down list to choose the paper or envelope size for this report. The default page size is "Letter."

### **Margin width**

Enter the size (in inches) of the margin you want to appear around the edge of the page. The default margin width is one half inch (0.5 inches).

### **Page orientation**

Choose the way you would like the pages of the report to be oriented, portrait or landscape.

### **Fit to page**

When you check *Fit to page* Volgistics will attempt to fit all of your report onto a single page across. Reports will still extend to additional pages if Volgistics cannot fit all of the report content onto a single page using the smallest legible font.

### **First title line**

Second title line

Type what you want to appear for the report title. Report titles may be two lines long.

The report title appears at the top of the first page, and at the top of subsequent pages if the report supports page breaks and you selected page breaks for the report.

### **Add Site name**

Check this checkbox if you want the Site name to appear as part of the report title when a [Site Level Operator \[pg:1442\]](#) prints a shared report. A shared report is a stock report, or a report created by the headquarters Site for use by all Sites. When you check this box, report titles will include the name of Site where the report was printed whenever the report is printed by a Site Level Operator. Do not check this box if you do not want shared reports which are printed by Site Level Operators to include the Site name.

This option only appears if you use the [Site Level Access \[pg:0092\]](#) features.

### **Add Set name**

If you [print this report for different Sets \[pg:0863\]](#) of volunteers you can optionally make the name of the [Set \[pg:0858\]](#) you're printing appear in the report title by checking this checkbox.

Do not check this checkbox if you never want Set names to appear as part of the report title when you print this report for specific Sets of volunteers.

### **Font name**

Use the drop down list to choose the name of the font you would like Volgistics to use for printing the report title.

### **First title font size**

Second title font size

The report title may include two lines of text, and each line may be printed in a different font size. This enables you to have a larger main title, and smaller sub-title. Use the drop down lists to choose the font size (in points) for the first and second title line lines.

### **Logo & title locations**

Use the drop down list to choose the way you would like to arrange your organization's logo and the report title at the top of the page.

You may include your organization's logo on selected reports if you installed a logo graphic file in your Volgistics account setup.

### **Body font name**

Body font size

Use the drop down lists to choose the font style and font size (in points) for the text in the body of the report. The body of the report includes all of the report content except the report title.

If you also select *Fit to page*, Volgistics may adjust the size of the body font so the report will fit onto one page across.

### **Lines**

Column style reports can include lines around the border of the report and between report columns. Lines often make column oriented reports easier to read. Choose *On* if you want this report to include lines, or *Off* if you prefer no lines. This option does not affect the content of the report except by adding or removing the line graphics.

### **Date and time printed**

Choose *On* if you want this report to include the date and time the report was printed in the lower left corner of each page. Choose *Off* if you prefer not to have the date and time printed.

### **Page numbers**

Choose *On* if you want page numbers printed at the bottom of each page. Choose *Off* if you prefer not to have page numbers printed.



## Corner index

Reports that list volunteers alphabetically can include an index in the lower right corner of each page that shows you which last names appear on that page, alphabetically. This makes it easier to locate particular volunteers by name on reports that includes multiple pages. For example, a page that begins with "Bailey, George" and ends with "Cabot, Anita" might have a corner index of **B-Ca**, indicating that the page includes all of the volunteers whose last names fall within **B** and **Ca** alphabetically.

Choose *On* if you want this corner index printed at the bottom of each page. Choose *Off* if you prefer not to have this corner index printed.

When you're finished choosing the page design for your report click **Next** to continue to the next step.

## Related help

[Help Topic 2223 \[pg:0467\]](#) - Creating custom reports

---

## Awards Reports

Help topic 8272

Added or revised 03-19-2013

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Awards reports are sorted by award. For each Award you have setup in Volgistics, this report lists the volunteers who are eligible for (or who have received) each award, followed by any fields of information you choose to include from the volunteer record.

These are examples of the [stock \[pg:0595\]](#) Awards report, however you can create many other report varieties from this format.

### Award eligibility (stock) [Details \[pg:0659\]](#)

Award Eligibility Sample Agency Name	
Award	Volunteer
100 Hour award	Kentley, David McMurphy, Ernie  Count: 2
500 hour award	Ballard, Elizabeth Bennegin, Keshia Edgerton, Giuseppina Green, Harriet Howard, Ernie  Count: 5
2000 Hour Award	Bailey, Harry Buller, Mike

### Presented awards (stock) [Details \[pg:0660\]](#)

Presented Awards	
Sample Agency Name	
Award	Volunteer
100 Hour award	Bailey, Harry Bailey, Mary Ballard, Elizabeth Bick, Violet Clark, Janice  Count: 5
500 hour award	Bailey, Harry Henderson, Mary  Count: 2
2000 Hour Award	Applebe, Tom Clark, Janice

**To create a new Awards report:**

1. Choose Print from the [menu \[pg:0215\]](#).
2. Click on "Awards," and then click on "Create a new awards report."
3. Customize your report using the Options, Fields, Page Design, and Include windows.

---

## Options (Excel Reports)

Help topic 1078

Added or revised 03-19-2013

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The

### *Options*

page appears when you create a new report or modify an existing report. Use the controls on this Options page to customize the structure of a [Excel spreadsheet \[pg:0513\]](#) report.

### **Sort by**

Choose the way you would like to organize the volunteer information in your Excel spread sheet report.

#### Volunteer name

Choose *Volunteer name* if you want to see information to be listed alphabetically by volunteer last name.

#### Volunteer number

Choose *Volunteer number* if you want to see volunteer information listed by (ascending) volunteer number.

#### *Include column headings*

Check the 'Include column headings' box to include the field name as a column heading in the worksheet's first row.

#### *Include volunteer names in 'child' records*

If this option is *not* checked, any worksheets other than the "Master" worksheet will identify information by volunteer number rather than volunteer name, regardless of the system operator's selection on the Options page. Choose this option to display volunteer names in a column in 'child' records.

#### *Only include non-archived volunteer records*

Select this option if you would like the spread sheet to include only volunteer records that have **not** been archived. Use the [Include tab \[pg:0507\]](#) for the report to specify which non-archived volunteer records should be included.

#### *Only include archived volunteer records*

Select this option if you would like the spread sheet to include only volunteer records that **are** currently archived. Use the [Include tab \[pg:0507\]](#) for the report to specify which archived volunteer records should be included.

#### *Include non-archived and archived volunteer records*

Select this option if you would like the spread sheet to include **both** volunteer records that are not currently archived and those that are currently archived. Use the [Include tab \[pg:0507\]](#) for the report to specify which volunteer records should be included.

When you're finished choosing the Options for your report, click **Next** to continue to the next step.

### **Related help**

[Help Topic 2223 \[pg:0467\]](#) - Creating custom reports

---

## Fields (Excel Reports)

Help topic 1085

Added or revised 03-19-2013

---

The

### *Fields*

page appears when you create a new report or modify an existing report. Use the Fields page to choose the fields you want to appear on this [Excel spread sheet \[pg:0513\]](#) report.

Mark the boxes next to each field you want to appear on the Excel spread sheet report for each volunteer. Your report will include a column for each item you select. For example, if an organization needed to see only the names of volunteers included in the report, the system operator creating the report would mark only the boxes for name fields. If, however, an organization also wanted to see all of the information stored on each volunteer's Profile tab, they would additionally mark each of the field boxes in the Profile tab section on the report's Fields page.

Since each field becomes a report column, fields should be chosen sparingly. If more columns than can fit legibly from left to right on a page are included, Volgistics automatically extends the report to additional pages *right* before starting the next page *down*.

When you're finished choosing the Fields for your report, click **Next** to continue to the next step.

### **Related help**

[Help Topic 2223 \[pg:0467\]](#) - Creating custom reports

---

## Include (Excel Reports)

Help topic 1091

Added or revised 10-02-2014

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The

### *Include*

page appears when you create a new report or modify an existing report. Use the options on the Include page to choose which volunteers you want to *include* in this [Excel spread sheet \[pg:0513\]](#) report.

### **Which volunteers do you want to include in this report?**

Choose which volunteers you want to appear on this report.

#### Tagged volunteers

This checkbox is disabled unless you previously [tagged \[pg:1529\]](#) one or more volunteer records. Check this checkbox if you want the report to include the tagged volunteers.

#### These volunteers:

Check this checkbox if you want the report to include **all** volunteers, or just the volunteers you specify using the following controls: (uncheck this checkbox only if you selected the *Tagged volunteers* checkbox and you want this report to include *only* the tagged volunteers).

### Status

Choose *Any* if you want this report to include volunteers regardless of what their **current** status is.

Choose *Any of these* if you want this report to include volunteers whose **current** status is one of those you check, then check the statuses you want to include.

### Type

Choose *Any* if you want this report to include volunteers regardless of what their Type is.

Choose *Any of these* if you want this report to include only volunteers whose Type is one of those you check, then check the Types you want to include.

The Type field appears in the Name box on the **Core tab** [pg:1868], and it is typically used for classifying volunteers by major program type, such as 'adult,' 'junior,' 'student,' 'regular,' 'occasional,' 'auxiliary,' and so forth.

### Kind

The Kind field is located on the Core tab in each volunteer record. It is used to show if a volunteer record is for an individual person or a **group** [pg:1909] that volunteers.

Select *Both individuals and groups* if you want the report to include both individuals and groups.

Select *Individuals only* if you want the report to only include individual volunteer records.

Select *Groups only* if you want the report to only include group volunteer records.

### Flag

Choose *Any* if you want this report to include volunteers regardless of what Flags appear on their Core tab.

Choose *Any of these* if you want this report to include only volunteers who have at least one of the Flags you check, then check the Flags you want to include.

Flags appear in the Flag box on the **Core tab** [pg:1868] for each volunteer. Flags are typically used to classify volunteers into different overlapping groups, such as 'board of directors,' 'donor,' 'sponsor,' 'day of caring,' 'red team,' and so forth.

### Site

This option appears if you use **Site Level Access** [pg:0092] in Volgistics, and you have access to the volunteer records for all Sites in your organization.

Choose *Any* if you want this report to include volunteers regardless of which Sites they serve at.

Choose *Any of these* if you want this report to include only volunteers who serve at at least one of the Sites you check, then check Sites you want to include.

### Set

Check this option, and then select a [Set \[pg:0858\]](#) if you want this report to include only the volunteers in a certain Set.

When you're finished choosing the Include options for your report click **Next** to continue to the next step.

#### **Related help**

[Help Topic 2223 \[pg:0467\]](#) - Creating custom reports

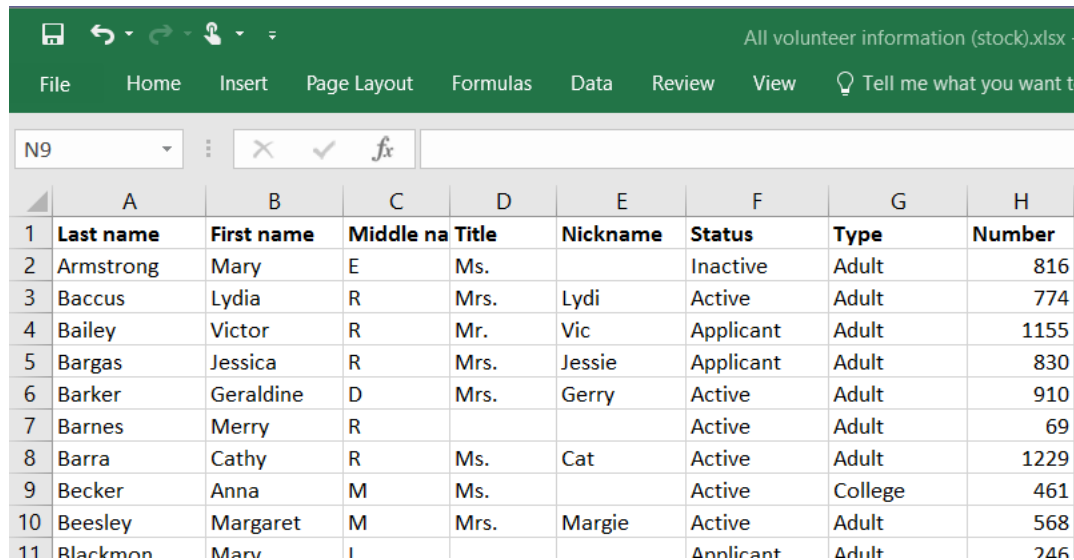
# What's Inside an Excel Spread Sheet File

Help topic 2165

Added or revised 06-09-2016

When you use the [Excel spreadsheet](#) [pg:0513] reports to create a spreadsheet file, Volgistics produces and returns a standard Microsoft Excel spreadsheet (XLSX) file to your Volgistics [In Box](#) [pg:0303]. What's inside this file will depend on which [stock report](#) [pg:0595] you use, or which [fields](#) [pg:0940] you select if you create a [custom](#) [pg:0467] spreadsheet report. You also choose which volunteer records appear in your spreadsheet. For example, you might include all of your volunteers, or just certain ones, depending on your needs. You select which volunteer information is on the report on the [Include tab](#) [pg:0507] when you run the report.

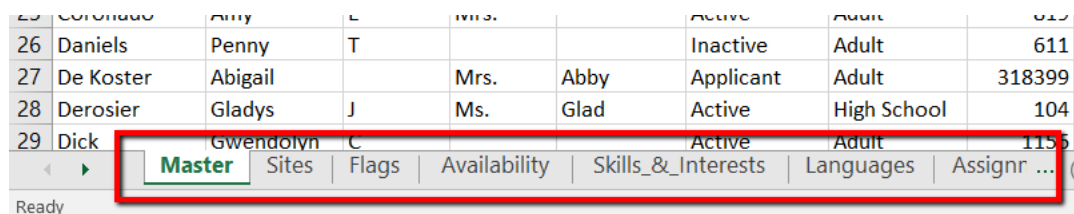
Spreadsheet files store information in rows and columns. The spreadsheet files you create using the Excel spreadsheet report have a row for each volunteer record and one column for each field you include. The spreadsheet shown below is an example. Each row contains the record for a different volunteer, and each column contains a different field. The first column contains the volunteer's *Last name*, the second column their *First name*, and so forth.



The screenshot shows an Excel spreadsheet titled "All volunteer information (stock).xlsx". The ribbon includes File, Home, Insert, Page Layout, Formulas, Data, Review, and View. The active cell is N9. The spreadsheet contains the following data:

	A	B	C	D	E	F	G	H
1	Last name	First name	Middle na	Title	Nickname	Status	Type	Number
2	Armstrong	Mary	E	Ms.		Inactive	Adult	816
3	Baccus	Lydia	R	Mrs.	Lydi	Active	Adult	774
4	Bailey	Victor	R	Mr.	Vic	Applicant	Adult	1155
5	Bargas	Jessica	R	Mrs.	Jessie	Applicant	Adult	830
6	Barker	Geraldine	D	Mrs.	Gerry	Active	Adult	910
7	Barnes	Merry	R			Active	Adult	69
8	Barra	Cathy	R	Ms.	Cat	Active	Adult	1229
9	Becker	Anna	M	Ms.		Active	College	461
10	Beesley	Margaret	M	Mrs.	Margie	Active	Adult	568
11	Blackmon	Mary	I			Applicant	Adult	246

Some of the spreadsheets you create using the Excel spreadsheet report may have multiple *worksheets*. When a spreadsheet has more than one worksheet, you'll see tabs for selecting the different worksheets near the bottom of the page as shown here:



The screenshot shows the bottom of an Excel spreadsheet with several worksheets visible: Master, Sites, Flags, Availability, Skills\_&\_Interests, Languages, and Assignr... The "Master" worksheet is selected and highlighted with a red box.

25	Coronado	Ann	L	Mrs.		Inactive	Adult	812
26	Daniels	Penny	T			Inactive	Adult	611
27	De Koster	Abigail		Mrs.	Abby	Applicant	Adult	318399
28	Derosier	Gladys	J	Ms.	Glad	Active	High School	104
29	Dick	Gwendolyn	C			Active	Adult	1155

The reason for these additional worksheets is that they provide a way for the report to hold more information. Some of the information you may track in Volgistics – such as volunteer service – is stored in multiple "records." For example, a volunteer who has 50 [service entries](#) [pg:1581] has 50 service "records" in the database. Different volunteers typically have different quantities of service records. Some may have just few, while others may have hundreds or thousands.

When one volunteer can have multiple records, we call these types of records "child" records. In the Excel spreadsheet reports, child records are placed on their own worksheet. In the example pictured above, there is a Master worksheet and additional worksheets for Sites, Flags, Availability, etc. because these are types of records where a volunteer can have more than one piece of information associated with the field.

The Master worksheet always contains the volunteer's core information such as their name and address. If your spreadsheet only includes this kind of core information, no additional worksheets appear. If your spreadsheet includes fields for any of the following kinds of records, you'll have a separate worksheet for each:

- Flags
- Availability
- Checklists
- Dates
- Characteristics
- Preferences
- Assignments
- Service
- Mandates
- Schedule
- Regular Schedule
- Contacts
- Notes

When records appear on their own worksheet, the first column of these additional worksheets always contains the volunteer **record number** [pg:1856] as shown here:



The screenshot shows the Excel ribbon with tabs for File, Home, Insert, Page Layout, and Formulas. Below the ribbon, the active cell is A1, containing the number 1. A red arrow points to the 'Number' header in cell A1. The table below has two columns: 'Number' and 'Flags'.

	A	B
1	<b>Number</b>	<b>Flags</b>
2	816	Travel Time - 1 hour
3	774	Approved Driver
4	774	Former Employee
5	774	Travel Time - 45 minutes
6	1155	First Aid Certified
7	1155	Travel Time - 1 hour 30 minutes
8	830	Blue Team
9	830	Travel Time - 1 hour
10	910	Policy Review Committee
11	910	Approved Driver
12	910	First Aid Certified
13	910	Travel Time - 30 minutes
14	69	Travel Time - 45 minutes

You can use this number to identify which volunteer record the information is for. It's often easier to have the volunteer's name appear, though. To do this, select *Include volunteer names in 'child' records* on the **Options tab** [pg:0506] when you **create the report** [pg:0467]. If you are running a **stock report** [pg:0595], clone the report to add this option. When the option to include names is selected, the name fields will appear on the additional worksheets as shown here:

	A	B	C	D
1	<b>Number</b>	<b>Last name</b>	<b>First name</b>	<b>Flags</b>
2	816	Armstrong	Mary	Travel Time - 1 hour
3	774	Baccus	Lydia	Approved Driver
4	774	Baccus	Lydia	Former Employee
5	774	Baccus	Lydia	Travel Time - 45 minutes
6	1155	Bailey	Victor	First Aid Certified
7	1155	Bailey	Victor	Travel Time - 1 hour 30 minutes
8	830	Bargas	Jessica	Blue Team
9	830	Bargas	Jessica	Travel Time - 1 hour
10	910	Barker	Geraldine	Policy Review Committee
11	910	Barker	Geraldine	Approved Driver
12	910	Barker	Geraldine	First Aid Certified
13	910	Barker	Geraldine	Travel Time - 30 minutes
14	69	Barnes	Merry	Travel Time - 45 minutes
15	1220	Barra	Cathy	CDR Certified

## Excel Spreadsheet Reports

Help topic 8261

Added or revised 10-07-2016

Use Excel Spreadsheet reports to create spreadsheet files that contain some or all of your volunteer information. You receive spreadsheet files on the [In Box tab \[pg:0303\]](#) of your Volgistics Mailbox, the same way you do other reports. You can open Excel spreadsheet files in Microsoft Excel (using Excel97 or later), or any other programs that support the current XLS file format.

With Excel spreadsheet files you can

- Modify, format, or add information and then print from Excel or other programs that use the XLS file format
- Include information from your spreadsheet in other word processing or Microsoft Office documents
- Save copies of your information on your own computer as an [external backup \[pg:0461\]](#)
- Transfer volunteer information to other kinds of programs

When you create new Excel spreadsheet reports, you choose the fields and the volunteers you want the spreadsheet to include. As with other reports, you can save your custom spreadsheet reports for use again later.

In addition to the ability to customize your own spreadsheet files, Volgistics provides the following [stock \[pg:0595\]](#) spreadsheet outputs.

**All volunteer information (stock) [Details \[pg:0658\]](#)**

	A	B	C	D	E	F	G	H	I	J
1	Last name, First name	First name Last name	Title First name Last name	Last name	First name	Middle name	Title	Nickname	Status	Type
2	Armstrong, Mary	Mary Armstrong	Ms. Mary Armstrong	Armstrong	Mary	E	Ms.		Applicant	Adult
3	Baccus, Lydia	Lydia Baccus	Mrs. Lydia Baccus	Baccus	Lydia	R	Mrs.	Lydi	Active	Adult
4	Bailey, Victor	Victor Bailey	Mr. Victor Bailey	Bailey	Victor	R	Mr.	Vic	Applicant	Adult
5	Bargas, Jessica	Jessica Bargas	Mrs. Jessica Bargas	Bargas	Jessica	R	Mrs.	Jessie	Applicant	Adult

**Names and addresses (stock) [Details \[pg:0655\]](#)**

	A	B	C	D	E	F	G	H	I	J	K
1	Last name	First name	Title	Street 1	Street 2	Street 3	City	State	Zip		
2	Armstrong	Mary	Ms.	4985 Maloy Court			Cascade	MI	49546		
3	Baccus	Lydia	Mrs.	4632 Cherry Ridge Drive			Wyoming	MI	49509		
4	Bailey	Victor	Mr.	2401 Franklee Lane			Caledonia	MI	49316		
5	Bargas	Jessica	Mrs.	3299 Masonic Hill Road	Apt. 7		Ada	MI	49301		

**Names and email addresses (stock) [Details \[pg:0654\]](#)**

	A	B	C	D	E	F	G	H	I	J
1	Last name, First name	Email								
2	Armstrong, Mary	maryarmstrong@pookmail.com								
3	Baccus, Lydia	lydiarbaccus@mailinator.com								
4	Bailey, Victor	victorbailey@dodgit.com								
5	Bargas, Jessica	jessicarbargas@dodgit.com								

**Names and pending awards (stock) [Details \[pg:0657\]](#)**

Number	Last name	First name	Event	Notation	Expires
774	Baccus	Lydia	1500 Hour Award	Pending	n/a
568	Beesley	Margaret	1500 Hour Award	Pending	n/a
209	Brooks	Aide	2 year award	Pending	n/a
104	Derosier	Gladys	500 Hour Award	Pending	n/a
1156	Dick	Guendahn	2000 Hour Award	Pending	n/a

**Names, addresses and phone numbers (stock) [Details \[pg:0656\]](#)**

Last name	First name	Title	Street 1	Street 2	Street 3	City	State	Zip	Home	Ok to call
Armstrong	Mary	Ms.	4985 Maloy Court			Cascade	MI	49546	(785) 463-7055	Yes
Baccus	Lydia	Mrs.	4632 Cherry Ridge Drive			Wyoming	MI	49509	(585) 771-7662	Yes
Bailey	Victor	Mr.	2401 Franklee Lane			Caledonia	MI	49316	(484) 580-6149	Yes
Bargas	Jessica	Mrs.	3299 Masonic Hill Road	Apt. 7		Ada	MI	49301	(501) 492-7320	Yes

To create a new Excel spreadsheet report:

1. Choose Print from the [menu \[pg:0215\]](#).
2. Click "Excel spreadsheet," and then click on "Create a new Excel spreadsheet report."
3. Customize your report using the Options, Fields, and Include windows.

When you reach the Save window you can either save your report without printing it (by clicking the **Save** button) or save your report and print it now (by clicking the **Save and Print** button). Retrieve your printed report from your Volgistics Mailbox.

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## Options (Label Reports)

Help topic 1062

Added or revised 03-19-2013

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The

### *Options*

page appears when you create a new report or modify an existing report. Use the controls on this Options page to customize the structure of an [Labels \[pg:0523\]](#) report.

### **Sort labels by**

Choose *Last name* if you want your labels sorted by the last name of the volunteer.

Choose *Zip or post code* if you want the labels sorted by the zip or post code in the volunteer's address. If you're preparing a bulk mailing you can choose to sort your labels by zip or post code. This makes it easier to organize the mailing according to the postal standards for bulk mail.

Choose *Volunteer number* if you want the labels sorted by volunteer PIN.

### **Other options**

#### Print count and date on the first label

Select this option if you want the report to show the number of labels printed. The first label will be used to show the label count, as well as the date and time the labels were printed.

#### Print lines along the edge of labels

Choose this option if you want the report to include a printed line around the edge of each label. Use this option if you're printing to plain paper to check label alignment before printing on your actual label sheets.

When you're finished choosing the Options for your report, click **Next** to continue to the next step.

### **Related help**

[Help Topic 2223 \[pg:0467\]](#) - Creating custom reports

---

## Fields (Label Reports)

Help topic 1079

Added or revised 03-19-2013

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The

### *Fields*

page appears when you create a new report or modify an existing report. Use the Fields page to choose the fields you want to appear on this [Labels \[pg:0523\]](#) report.

### Fixed text

If certain text should be printed on the top row of each label in your Labels report, enter it in the "Print this text on the first row of every label:" field. For instance, you could print labels that all have "Super Volunteer" on the first line. These labels would look like this:

Super Volunteer  
George Bailey  
123 Sycamore Street  
Bedford Falls, IN 12345

Then choose which fields from the volunteer record should be included in the report for each volunteer. Mark the box next to the name of each field that should be included on the Labels.

When you're finished choosing the Fields for your report, click **Next** to continue to the next step.

### Related help

[Help Topic 2223 \[pg:0467\]](#) - Creating custom reports

---

## Include (Label Reports)

Help topic 1087

Added or revised 10-02-2014

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The

*Include*

page appears when you create a new report or modify an existing report. Use the options on the Include page to choose which volunteers you want to *include* in this [Labels \[pg:0523\]](#) report.

### Which volunteers do you want to include in this report?

Choose which volunteers you want to appear on this report.

#### Tagged volunteers

This checkbox is disabled unless you previously [tagged \[pg:1529\]](#) one or more volunteer records. Check this checkbox if you want the report to include the tagged volunteers.

#### These volunteers:

Check this checkbox if you want the report to include **all** volunteers, or just the volunteers you specify using the following controls: (uncheck this checkbox only if you selected the *Tagged volunteers* checkbox and you want this report to include *only* the tagged volunteers).

#### Status

Choose *Any* if you want this report to include volunteers regardless of what their **current** status is.

Choose *Any of these* if you want this report to include volunteers whose **current** status is one of those you check, then check the statuses you want to include.

## Type

Choose *Any* if you want this report to include volunteers regardless of what their Type is.

Choose *Any of these* if you want this report to include only volunteers whose Type is one of those you check, then check the Types you want to include.

The Type field appears in the Name box on the [Core tab \[pg:1868\]](#), and it is typically used for classifying volunteers by major program type, such as 'adult,' 'junior,' 'student,' 'regular,' 'occasional,' 'auxiliary,' and so forth.

## Kind

The Kind field is located on the Core tab in each volunteer record. It is used to show if a volunteer record is for an individual person or a [group \[pg:1909\]](#) that volunteers.

Select *Both individuals and groups* if you want the report to include both individuals and groups.

Select *Individuals only* if you want the report to only include individual volunteer records.

Select *Groups only* if you want the report to only include group volunteer records.

## Flag

Choose *Any* if you want this report to include volunteers regardless of what Flags appear on their Core tab.

Choose *Any of these* if you want this report to include only volunteers who have at least one of the Flags you check, then check the Flags you want to include.

Flags appear in the Flag box on the [Core tab \[pg:1868\]](#) for each volunteer. Flags are typically used to classify volunteers into different overlapping groups, such as 'board of directors,' 'donor,' 'sponsor,' 'day of caring,' 'red team,' and so forth.

## Site

This option appears if you use [Site Level Access \[pg:0092\]](#) in Volgistics, and you have access to the volunteer records for all Sites in your organization.

Choose *Any* if you want this report to include volunteers regardless of which Sites they serve at.

Choose *Any of these* if you want this report to include only volunteers who serve at at least one of the Sites you check, then check Sites you want to include.

## Set

Check this option, and then select a [Set \[pg:0858\]](#) if you want this report to include only the volunteers in a certain Set.

When you're finished choosing the Include options for your report click **Next** to continue to the next step.

## **Related help**

[Help Topic 2223 \[pg:0467\]](#) - Creating custom reports

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## Page Design (Label Reports)

Help topic 1122

Added or revised 03-19-2013

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The Page Design page appears when you create a new report or modify an existing report. Use these options on the Page Design page to customize the size and arrangement of labels on this Labels report:

### **Avery® label number**

Labels are formatted for printing on laser or ink jet printer label sheets. If you're using Avery brand label sheets, or label sheets that list the comparable Avery stock number, select the stock number of the label sheets you intend to print on. If you do not know the stock number of your labels, or your stock number is not listed, choose 'Unknown or different brand.'

### **Font name**

Choose the font you want to use for the text on your labels.

### **Font size**

Choose the font size in points for the font used on your labels.

### **Fit to label**

Depending on the size of label you're printing to, the font size you choose, and the amount of text to be printed on a particular label, it is possible that some text may extend beyond the right edge of the label. Normally, text that will not fit on a label is truncated to prevent it from overprinting the adjacent label.

Check this option if you want the report to *attempt* to make all of the text fit on the label. It does this by choosing a smaller font size for the labels where the text is too wide. Note that in some cases, the label text could still be too wide even at the smallest legible font. In these cases the excess text is still truncated.

### **Margin around edge of individual labels**

Your labels can include a small margin around the edge of each label. Enter the size you want this margin to be, in inches (or fraction of an inch). For example, enter 0.1 if you want a margin that is 1/10th of an inch wide. This margin appears along all four sides of your labels.

### **What style of label sheet will you print on?**

The following Page Design options appear only if you choose "Unknown or different brand" in the Avery stock number field. You can use these options to tailor your report to fit the dimensions and layout of the label sheets you intend to print on.

#### Page size

Choose the page size of your label sheets.

#### How many labels are in each row across the page?

Enter the number of labels there are in each row across the page.



### How many labels are in each column down the page?

Enter the number of labels there are in each column down the page.

### Side margin

Enter, in inches (or fraction of an inch), the width of the margin between the left edge of the sheet and the first column of labels.

### Top margin

Enter, in inches (or fraction of an inch), the height of the margin between the top edge of the sheet and the top of the first row of labels.

### Margin between label columns:

If your label sheets have more than one column of labels, enter, in inches (or fraction of an inch), the width of the margin between each column of labels. If there is no space between columns, enter zero.

### Margin between label rows

Enter, in inches (or fraction of an inch), the height of the margin between each row of labels. If there is no space between rows, enter zero.

### Bottom margin

Enter, in inches (or fraction of an inch), the height of the margin between the bottom edge of the sheet, and the bottom of the last row of labels.

When you're finished choosing the Page Design for your report, click **Next** to continue to the next step.

### **Related help**

[Help Topic 2223 \[pg:0467\]](#) - Creating custom reports

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## **Creating a Custom Labels Report**

Help topic 1154

Added or revised 01-29-2008

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If you find that label text is not properly aligned when printing a labels report, the first step is to [turn off page scaling in Adobe Reader \[pg:0522\]](#). If alignment issues remain unresolved after following this procedure, you can create a custom label report that gives you full control over margins and spacing. You can use such a report to "nudge" the labels up, down, left or right as required.

### **To setup a custom label report:**

1. Select Print from the [menu \[pg:0215\]](#).
2. Click on Address labels and then click on "Create a new address labels report."

3. On the Options page, under *Print address labels for:* choose "Volunteers" and any other options you prefer. Then click the **Next** button.
4. On the Fields page select the desired name format for your labels and then click the **Next** button.
5. On the [Page Design page \[pg:0478\]](#) change the Avery label number selection to "Unknown or different brand" (at the top of the list of label numbers). This expands the Page Design page to give you full control over the label placement on the page.
6. Click the **Next** button on the Page design page to advance to the Include page.
7. On the Include page just click **Next** to advance to the "Save" page.
8. On the "Save" page, enter a name for your custom label sheet (e.g. "My Labels"), and then click the **Save and Print** button to Print the report.

--

You now have a custom label report you can adjust as necessary to suit your printer and your labels.

Try printing your labels again using this new report. If the alignment is still not what you need, you can tweak the alignment of your labels by modifying the report to move the label left, right, up or down.

#### **To make an adjustment to your label alignment:**

1. Select Print from the menu.
2. Click on Address labels and then click on the name of the report you created above (e.g. "My Labels").
3. Click the Page Design tab. The [Page Design page \[pg:0478\]](#) is where you can adjust the label alignment. Make any adjustment you would like:
  - Use the "Side margin" field to increase or decrease the space from the left side of the label sheet to the left side of the first label column.
  - Use the "Top margin" field to increase or decrease the space from the top of your label sheet to the top of the first label row.
  - Use the "Margin between label columns" field to increase or decrease the vertical space from the right side of the first label column to the left side of the second label column. If your labels do not have space between them, this setting would be 0.00.
  - Use the "Margin between label rows" field to increase or decrease the horizontal space from the bottom on the first label row to the top of the second label row. If there is no space between your label rows, this setting would be 0.00.
  - Use the "Bottom margin" field to increase or decrease the space from the bottom of the last label row to the bottom of the label sheet.
4. Once you're finished making your adjustment click the Save tab and save your report.

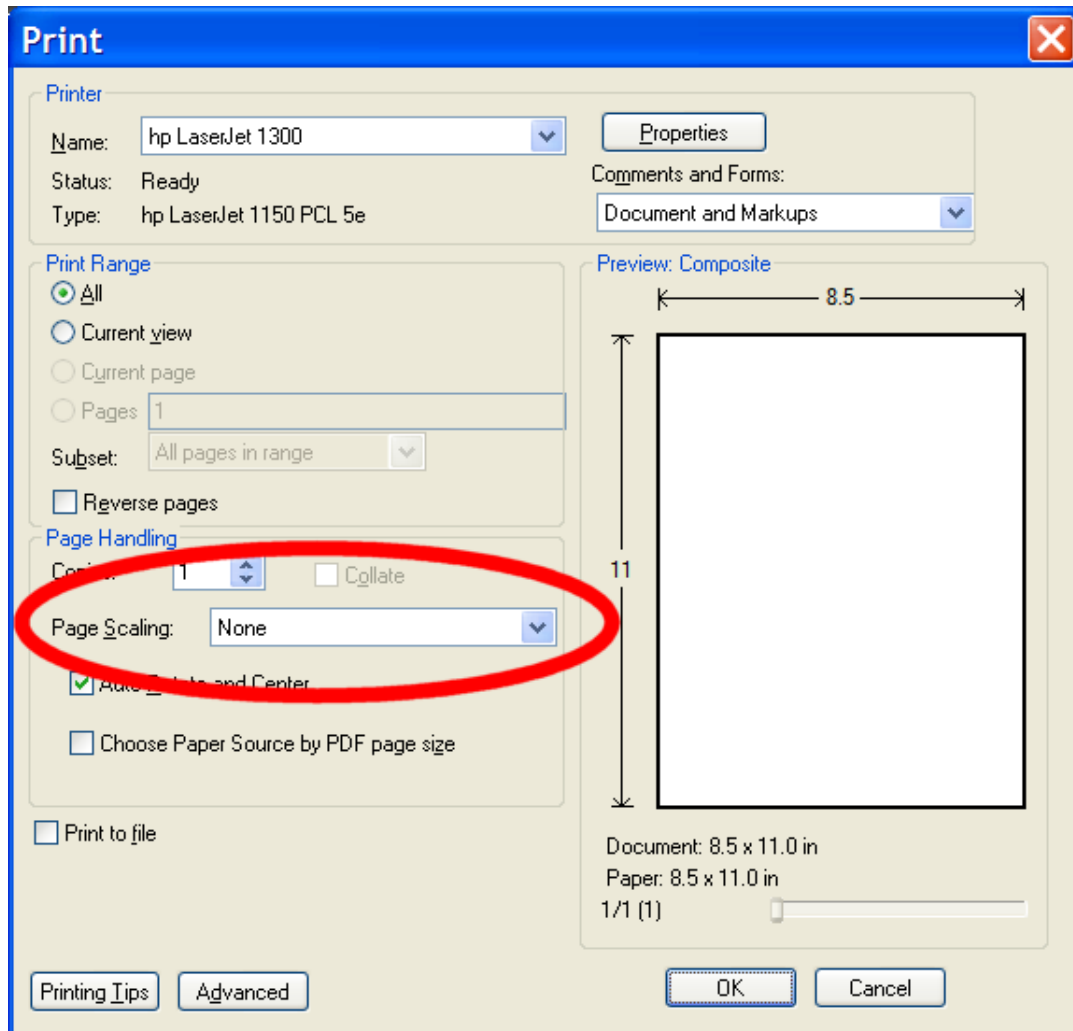
## Label Text Alignment

Help topic 2119

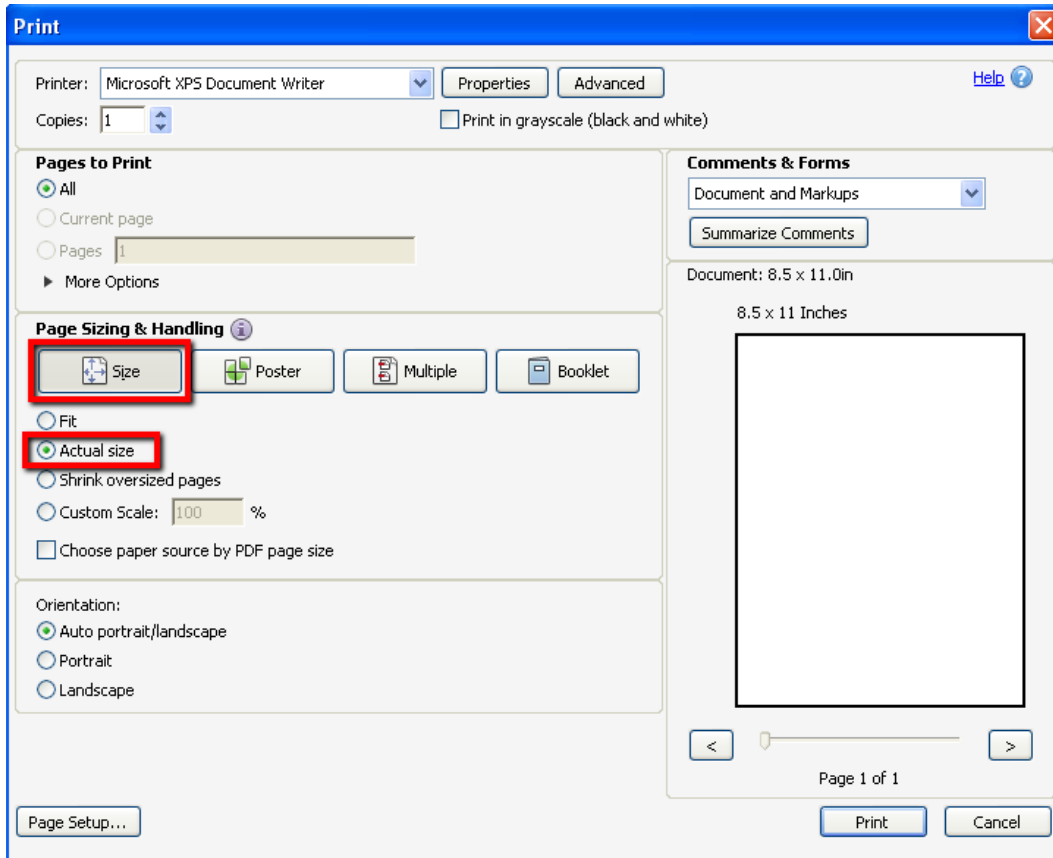
Added or revised 10/24/2013

Like other Volgistics reports, you receive *label* reports as [Adobe Reader PDF files \[pg:0449\]](#), and you print your labels from these PDF files using Adobe Reader. If you find that your label text is not properly aligned when you print these reports, disable 'page scaling' in Adobe Reader. To do this in Adobe Reader 9 or earlier:

1. From your Volgistics Mailbox, click on the label report you want to print. This opens Adobe Reader and displays the report on the screen.
2. In *Adobe Reader*, click the Printer icon (or choose Print from the *Adobe Reader File menu*). This opens a 'Print' dialog box.
- 3a. If you are using Adobe Reader 9 or lower, locate the 'Page Handling' box and then set the Page Scaling selection to 'None,' as shown here:



- 3b. If you are using Adobe Reader X or higher, under "Page Sizing & Handling" click 'Size' and select 'Actual size', as shown here:



4. Click the 'OK' or 'Print' button.

If this does not result in proper text alignment on the label, check these things:

1. Double check to be sure you selected the correct Avery® label number on the Page Design tab of the report if you're using Avery brand labels, or if your label manufacturer provides the comparable Avery stock number. If you're not using Avery labels or you're not sure of the Avery® label number, be sure you've selected "Unknown or different brand" as the Avery® label number, and then double check your label page dimensions on the Page Design tab.
2. In rare cases there are compatibility issues with Adobe Reader and certain printer driver software versions that cause text alignment problems. Adobe provides more information about this, and additional support for Adobe Reader at Adobe Reader Support.

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## Labels Reports

Help topic 8260

Added or revised 12-11-2007

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Use Label reports to print specialized labels that include information from your volunteer records. These reports work with sheet fed labels or index cards for laser or ink jet printers.

Labels reports may include any information from volunteer records, such as their name, Status, Type, Flags, Service statistics, or any other field of information. These kinds of specialty labels are useful for tasks such as labeling pre-printed volunteer time sheets, volunteer registration packets, or even index cards.

If you need simple mailing labels for volunteers, use an [Address labels \[pg:0483\]](#) report instead.

**Note:** Depending on the number and type of fields you add to Labels reports, the size of the labels or index cards you're printing on, and the font size you choose; some volunteers may have more information than will fit on a card or label. Rather than overprinting the next label the report truncates any data that will not fit. Use labels or index cards of sufficient size for the amount of information you intend to include.

Stock Label reports:

**File folder labels (stock)** [Details \[pg:0643\]](#)

Applebe, Tom Adult	Bailey, Harry Adult
Bailey, Mary Adult	Ballard, Elizabeth Adult
Bennegin, Keshia Junior	Calbert, Bert Adult

**Labels with Assignments (stock)** [Details \[pg:0644\]](#)

Applebe, Tom Info Desk [Administration] Assigned Phones [Volunteer Office] Substitute	Bailey, Harry Info Desk [Administration] Referral Transportation Driver [Client Services] Referral	Bailey, Mary Info Desk [Administration] Assigned
Ballard, Elizabeth Patient Intake [Administration] Assigned	Bennegin, Keshia	Calbert, Bert Info Desk [Administration] Inactive
Clark, Janice Speakers Bureau [Volunteer Office] Inactive	Clark, Kevin Transportation Driver [Client Services] Assigned	Dakin, Ruth Info Desk [Administration] Referral

**Labels with Flags (stock)** [Details \[pg:0646\]](#)

Applebe, Tom Blue Team Regular Telephone Pioneer	Bailey, Harry Green Team Regular	Bailey, Mary Auxiliary Red Team RSVP
Ballard, Elizabeth Auxiliary Regular	Bennegin, Keshia	Calbert, Bert Day of caring Red Team Regular Telephone Pioneer
Clark, Janice Auxiliary	Clark, Kevin Day of caring Red Team	Dakin, Ruth Blue Team

**Labels with Life Hours (stock) [Details \[pg:0648\]](#)**

Applebe, Tom 571:30	Bailey, Harry 69:00	Bailey, Mary 639:56
Ballard, Elizabeth 195:35	Bennegin, Keshia 14:15	Calbert, Bert 0:00
Clark, Janice 63:10	Clark, Kevin 1,078:37	Dakin, Ruth 53:50

**Labels with Schedules (stock) [Details \[pg:0650\]](#)**

Applebe, Tom 09-22-2004 Setup Logistics [Annual 10K Run] 1:00 p to 6:00 p  09-23-2004 Finish line [Annual 10K Run] 7:30 a to 10:00 a	Bailey, Harry 09-22-2004 Setup Logistics [Annual 10K Run] 1:00 p to 6:00 p  09-23-2004 Finish line [Annual 10K Run] 7:30 a to 10:00 a
Bailey, Mary 09-22-2004 Setup Logistics [Annual 10K Run] 1:00 p to 6:00 p	Ballard, Elizabeth 09-22-2004 Setup Logistics [Annual 10K Run] 1:00 p to 6:00 p

**Labels with Type (stock) [Details \[pg:0652\]](#)**

Applebe, Tom Adult	Bailey, Harry Adult	Bailey, Mary Adult
Ballard, Elizabeth Adult	Bennegin, Keshia Junior	Calbert, Bert Adult
Clark, Janice Adult	Clark, Kevin Junior	Dakin, Ruth Adult

**To create a new Labels report:**

1. Choose Print from the [menu \[pg:0215\]](#).
2. Click on "Labels," and then click on "Create a new Labels report."
3. Customize your report using the Options, Fields, Page Design, and Include windows.

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## Options (Name Tag Reports)

Help topic 1077

Added or revised 03-20-2013

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The *Options* page appears when you create a new report or modify an existing report. Use the controls on this Options page to customize the structure of a **Name Tags** report.

### Print name tags for

Name tags can be printed for volunteers, coordinators, and any kind of [contact tracked on the Contacts tab \[pg:1829\]](#) in the volunteer record. Mark the box next to the category or categories of people for whom name tags should be printed.

### Other options

#### Print count and date on the first label

By checking this option, the number of labels included in the report and the date and time the report was printed will be indicated on the first label in the report.

#### Print lines along edge of labels

To include border lines along the edge of labels, choose this option.

When you're finished choosing the Options for your report, click **Next** to continue to the next step.

### Related help

[Help Topic 2223 \[pg:0467\]](#) - Creating custom reports

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## Fields (Name Tag Reports)

Help topic 1081

Added or revised 03-20-2013

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The *Fields* page appears when you create a new report or modify an existing report. Use the Fields page to choose the field arrangement you want for this **Name Tags** report.

#### Your message:

Use this field to enter any text that should appear at the top of each name tag. If there is no need to include text on the top of the name tags, this field can be left blank.

Then choose which information should be displayed in the center of the name tag. The field options for this location of the name tag include the following: First name only; Nickname, First name if Nickname is blank, and First name and Last name.

Finally choose which information should be displayed in the lowest section of the name tag. Options include: First name Last name; Last name only; Title First name Last name, or Omit this line.

When you're finished choosing the Fields for your report, click **Next** to continue to the next step.



## Related help

[Help Topic 2223 \[pg:0467\]](#) - Creating custom reports

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# Include (Name Tag Reports)

Help topic 1088

Added or revised 10-02-2014

---

The *Include* page appears when you create a new report or modify an existing report. Use the options on the Include page to choose which volunteers you want to *include* in this **Name tags** report.

## Which volunteers do you want to include in this report?

Choose which volunteers you want to appear on this report.

### Tagged volunteers

This checkbox is disabled unless you previously [tagged \[pg:1529\]](#) one or more volunteer records. Check this checkbox if you want the report to include the tagged volunteers.

### These volunteers:

Check this checkbox if you want the report to include **all** volunteers, or just the volunteers you specify using the following controls: (uncheck this checkbox only if you selected the *Tagged volunteers* checkbox and you want this report to include *only* the tagged volunteers).

### Status

Choose *Any* if you want this report to include volunteers regardless of what their **current** status is.

Choose *Any of these* if you want this report to include volunteers whose **current** status is one of those you check, then check the statuses you want to include.

### Type

Choose *Any* if you want this report to include volunteers regardless of what their Type is.

Choose *Any of these* if you want this report to include only volunteers whose Type is one of those you check, then check the Types you want to include.

The Type field appears in the Name box on the [Core tab \[pg:1868\]](#), and it is typically used for classifying volunteers by major program type, such as 'adult,' 'junior,' 'student,' 'regular,' 'occasional,' 'auxiliary,' and so forth.

### Kind

The Kind field is located on the Core tab in each volunteer record. It is used to show if a volunteer record is for an individual person or a [group \[pg:1909\]](#) that volunteers.

Select *Both individuals and groups* if you want the report to include both individuals and groups.

Select *Individuals only* if you want the report to only include individual volunteer records.

Select *Groups only* if you want the report to only include group volunteer records.

### Flag

Choose *Any* if you want this report to include volunteers regardless of what Flags appear on their Core tab.

Choose *Any of these* if you want this report to include only volunteers who have at least one of the Flags you check, then check the Flags you want to include.

Flags appear in the Flag box on the **Core tab** [pg:1868] for each volunteer. Flags are typically used to classify volunteers into different overlapping groups, such as 'board of directors,' 'donor,' 'sponsor,' 'day of caring,' 'red team,' and so forth.

### Site

This option appears if you use **Site Level Access** [pg:0092] in Volgistics, and you have access to the volunteer records for all Sites in your organization.

Choose *Any* if you want this report to include volunteers regardless of which Sites they serve at.

Choose *Any of these* if you want this report to include only volunteers who serve at at least one of the Sites you check, then check Sites you want to include.

### Set

Check this option, and then select a **Set** [pg:0858] if you want this report to include only the volunteers in a certain Set.

When you're finished choosing the Include options for your report click **Next** to continue to the next step.

### **Related help**

**Help Topic 2223** [pg:0467] - Creating custom reports

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## **Page Design (Name Tag Reports)**

Help topic 1124

Added or revised 03-20-2013

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The Page Design page appears when you create a new report or modify an existing report. Use these options on the Page Design page to customize the size and arrangement of labels on this Name Tags report:

### **Avery® label number**

Name tags are formatted for printing on laser or ink jet printer label sheets. If you're using Avery brand label sheets, or label sheets that list the comparable Avery stock number, select the stock number of the label sheets you intend to print on. If you do not know the stock number of your labels, or your stock number is not listed, choose 'Unknown or different brand.'

### **Font name**

Choose the font you want to use for the text on your name tags.

### **Font size**

Choose the font size in points for the font used on your name tags.

### **Fit to label**

Depending on the size of label you're printing to, the font size you choose, and the amount of text to be printed on a particular label, it is possible that some text may extend beyond the right edge of the name tag. Normally, text that will not fit on a label is truncated to prevent it from overprinting the adjacent label.

Check this option if you want the report to *attempt* to make all of the text fit on the label. It does this by choosing a smaller font size for the labels where the text is too wide. Note that in some cases, the label text could still be too wide even at the smallest legible font. In these cases the excess text is still truncated.

### **Margin around edge of individual labels**

Your name tags can include a small margin around the edge of each label. Enter the size you want this margin to be, in inches (or fraction of an inch). For example, enter 0.1 if you want a margin that is 1/10th of an inch wide. This margin appears along all four sides of your labels.

### **What style of label sheet will you print on?**

The following Page Design options appear only if you choose "Unknown or different brand" in the Avery stock number field. You can use these options to tailor your report to fit the dimensions and layout of the label sheets you intend to print on.

#### Page size

Choose the page size of your label sheets.

#### How many labels are in each row across the page?

Enter the number of labels there are in each row across the page.

#### How many labels are in each column down the page?

Enter the number of labels there are in each column down the page.

#### Side margin

Enter, in inches (or fraction of an inch), the width of the margin between the left edge of the sheet and the first column of labels.

#### Top margin

Enter, in inches (or fraction of an inch), the height of the margin between the top edge of the sheet and the top of the first row of labels.

#### Margin between label columns:

If your label sheets have more than one column of labels, enter, in inches (or fraction of an inch), the width of the margin between each column of labels. If there is no space between columns, enter zero.

### Margin between label rows

Enter, in inches (or fraction of an inch), the height of the margin between each row of labels. If there is no space between rows, enter zero.

### Bottom margin

Enter, in inches (or fraction of an inch), the height of the margin between the bottom edge of the sheet, and the bottom of the last row of labels.

When you're finished choosing the Page Design for your report, click **Next** to continue to the next step.

### **Related help**

[Help Topic 2223 \[pg:0467\]](#) - Creating custom reports

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## **Name Tags Reports**

Help topic 8265

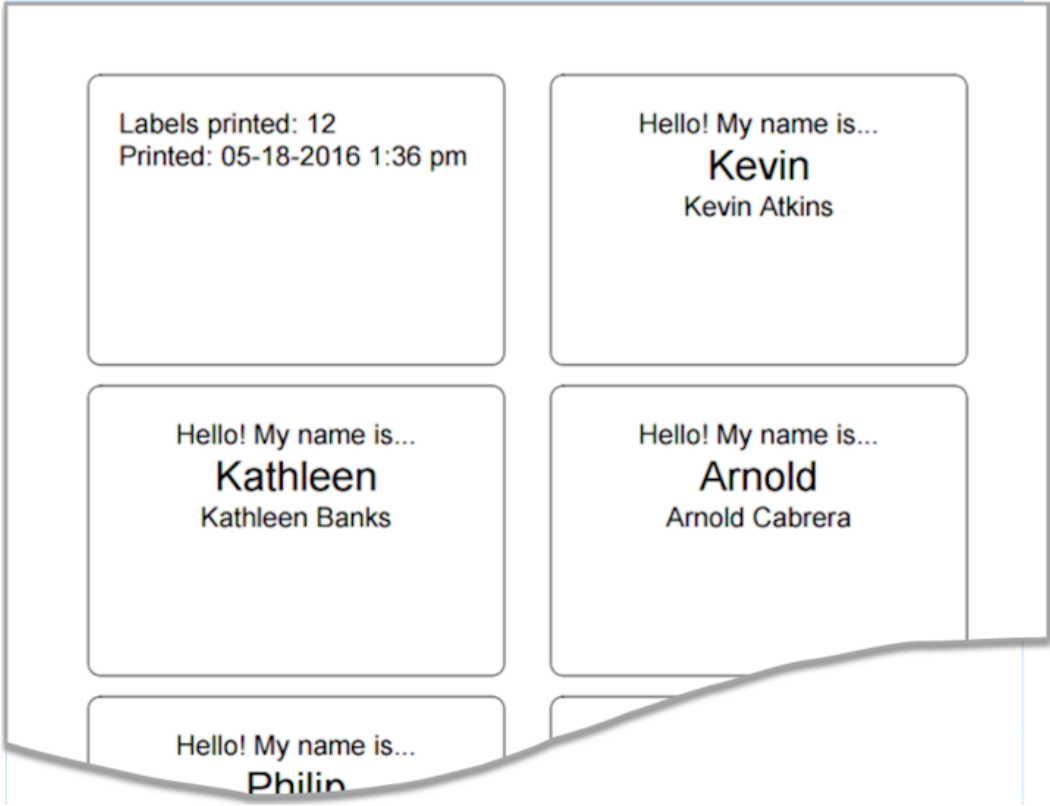
Added or revised 05-19-2016

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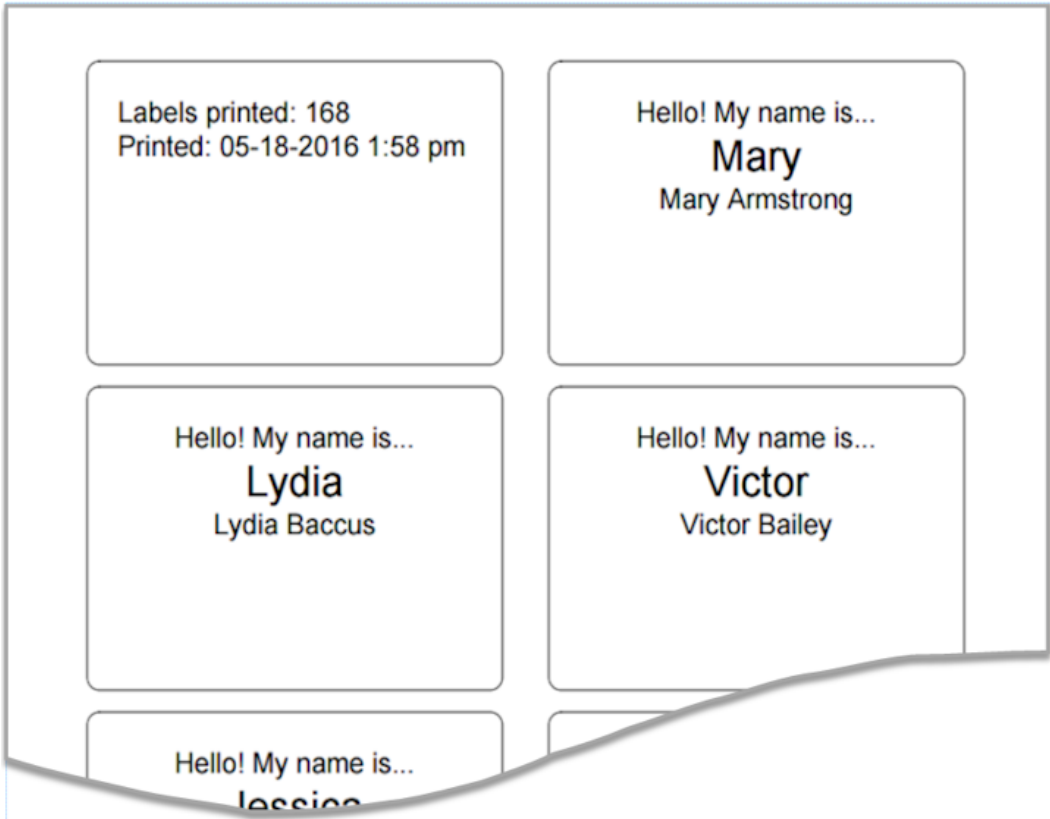
Name Tags reports are designed to print name tags for your [volunteers \[pg:1849\]](#) or [Coordinators \[pg:0163\]](#). The reports are generated in [PDF \[pg:0449\]](#) format and use the Avery 5395 format by default. This allows you to print the name tags on an ink jet or laser printer by using sheet fed name tag templates.

Here are examples of the [stock \[pg:0595\]](#) Name Tags reports:

**Coordinator Name Tags (stock)** [Details \[pg:0677\]](#)



Volunteer Name Tags (stock) [Details \[pg:0675\]](#)



You can also customize the reports to have different font sizes or styles, margins, fields of information, or greeting message. Name tags reports can also be run for any of the records on the volunteer's Contacts tab such as [emergency contacts \[pg:1829\]](#). To customize a stock report, click the **Clone it** button after you select the name of the report from the Print menu.

Or you can create a custom Name Tags report from scratch by:

1. Select Print from the menu.
2. Expand the *Name tags* link.
3. Select *Create a new name tags report*.
4. Go through each of the tabs and select the options you want.
5. Save the report on the Save tab.

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## Fields (Schedule Reports)

Help topic 1037

Added or revised 04-04-2016

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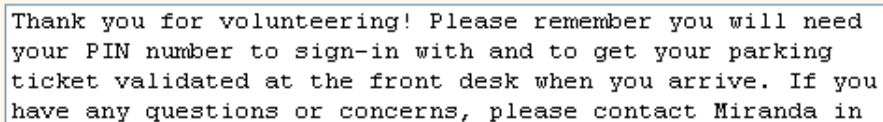
The *Fields* page appears when you create a new report or modify an existing report. Use the Fields page to choose the fields you want to appear on a **Schedule** report.

### Top instructions

Use the *Top instructions* field to enter any directions or comments that should appear at the top of the page before each schedule in the report. These directions will be included on each page that starts a new report section.

In many cases, the Schedule report will be used to create a printable version of the schedule to give to volunteers or Coordinators. The *Top instructions* field provides a convenient way to list contact information or remind volunteers of your organization's policies.

#### Top instructions

A screenshot of a text input field with a light blue border and a light yellow background. The text inside reads: "Thank you for volunteering! Please remember you will need your PIN number to sign-in with and to get your parking ticket validated at the front desk when you arrive. If you have any questions or concerns, please contact Miranda in". To the right of the text are three small blue icons: an upward-pointing arrow, a list icon, and a downward-pointing arrow.

Enter any instructions you would like to appear at the top of the schedule

### Schedule fields

Choose the information fields you want to appear in the cell for each schedule entry.

#### Name format

Choose the format you'd like for how volunteer names will be listed.

### Volunteer information

Use this section to select the volunteer information that you want to appear for each schedule entry. This section does not appear when *Volunteer* is selected in the *Group schedules by* section of the [Options \[pg:0542\]](#) tab. It will also not appear if *Print unfilled openings only* is selected on the Options tab.

#### Print the selected volunteer information along with each schedule entry

Choose this option if you want the selected information to be listed in each schedule entry or cell where the volunteer's name appears. Selecting this will make the schedule appear more crowded depending on how many fields are checked. If you will be including more than two or three fields, the option to print the information in list format will make the schedule more readable.

#### Print the selected volunteer information in a list below each schedule for each volunteer who appears on the schedule

Choose this option if you want the selected information to be listed underneath of the schedule. This option is recommended if you will be including more than two fields because it will make the schedule more readable.

### Fields

Mark the boxes next to each field tracked in the volunteer record that should appear on the Schedule report for each volunteer. When the schedule entry option is selected above, your report will include a line in each schedule entry for each item you select. When the list option is selected above, your report will include a column for each item you select.

Because the number of fields selected affects the readability of the schedule, we recommend that they be chosen sparingly. For example, if you select the list format and a large number of fields are selected, the column width will be narrowed to fit all of the columns on the page. This causes the information in the columns to be hard to read.

### **Substitute List**

You can include a list of volunteers who are available to substitute. This is beneficial so volunteers and Coordinators can quickly see who is available in case they cannot make a scheduled shift. When a substitute for an assignment is found, you will need to either remove the original volunteer from the schedule and replace them with the substitute, or use [substitute tracking \[pg:0745\]](#) to change the schedule.

This section does not appear when *Volunteer* is selected in the *Group schedules by* section of the [Options \[pg:0542\]](#) tab.

### Include substitute lists

Check this box to if you want a list of substitutes to appear underneath the schedule.

### Substitute list heading

By default, the heading for this section will appear as "Substitute volunteers." If you want a different heading to be used, change the information in this field to what you'd like the heading to be.

### Check the role(s) that represent substitute volunteers

Check the [Roles \[pg:0103\]](#) in the assignment you want volunteers to have in order to appear on the substitute list. These volunteers may or may not be scheduled for the assignment already because having a Role in the assignment is not the same thing as being scheduled for it. Please see [help topic 1185 \[pg:0193\]](#) for more information on this.

### Substitute list instructions

Use the *Substitute list instructions* field to enter any directions or comments that should appear at the top of the substitute list for each Site, Place, Assignment or Cluster.

In many cases, the Schedule report will be used to create a printable version of the schedule to give to volunteers or Coordinators. The *Substitute list instructions* field provides a convenient way to remind volunteers to find a substitute if they are unable to make a scheduled shift and to let the appropriate people in your organization know.



### Substitute list instructions

If you are unable to make your scheduled shift, please try to find a substitute by contacting the volunteers listed below. When you find a substitute, please let Miranda know so that she can update the schedule. You can reach her by

Enter any instructions you would like to appear above the list of substitutes

### Include these fields for each substitute

Mark the boxes next to each field tracked in the volunteer record that should appear on the list for substitute volunteers. Your report will include a column for each item you select.

Because the number of fields selected affects the readability of the list, we recommend that they be chosen sparingly. For example, if you select a large number of fields, the column width will be narrowed to fit all of the columns on the page. This causes the information in the columns to be hard to read.

### Sort the substitute list by

Use these settings to choose how your substitute list is arranged. You can choose to have the list sorted by "Name," "Randomly," "Life hours, least to most," or "Life hours, most to least." It is useful to control how the list is arranged because substitutes at the top of the list are most likely to be called first. So arranging the list "Randomly" will prevent one group of volunteers from getting called more than others. Similarly, if you choose to arrange the list "Life hours, least to most," volunteers who do not serve as often will most likely be called first. This can help prevent "burn out" among your volunteers.

**Note:** If this option appears grayed out or disabled, there are no volunteers in your database that have the selected Roles in the assignments the schedule covers.

### **Coordinator List**

You can include a list of Coordinators for each Site, Place or Assignment section on the schedule. Coordinator records are usually used to designate staff or volunteers who oversee certain assignments. You can find out more about this in [help topic 1111 \[pg:0163\]](#). This is beneficial so volunteers can quickly find contact information for the Coordinator(s).

This section does not appear when *Volunteer* is selected in the *Group schedules by* section of the [Options \[pg:0542\]](#) tab.

### Include Coordinator lists

Check this box to if you want a list of Coordinators to appear underneath of the schedule.

### Coordinator list heading

By default, the heading for this section will appear as "Coordinators." If you want a different heading to be used, change the information in this field to what you'd like the heading to be.

### Coordinator list instructions

Use the *Coordinator list instructions* field to enter any directions or comments that should appear at the top of the Coordinator list for each Site, Place, Assignment or Cluster.

In many cases, the Schedule report will be used to create a printable version of the schedule to give to volunteers. The *Coordinator list instructions* field provides a convenient way to provide additional information to volunteers.

#### Coordinator list instructions

The Coordinator(s) for your assignment appear below. Please report to their station at the beginning of your shift to get instructions and any equipment needed. If they are unavailable, please see Miranda in the Volunteer

Enter any instructions you would like to appear above the list of Coordinators

#### Include these fields for each Coordinator

Mark the boxes next to each field tracked in the Coordinator record that should appear on the list. Your report will include a column for each item you select.

Because the number of fields selected affects the readability of the list, we recommend that they be chosen sparingly. For example, if you select a large number of fields, the column width will be narrowed to fit all of the columns on the page. This causes the information in the columns to be hard to read.

#### **Statistics**

Use these selections to include statistics for your schedule. Statistics will be broken down according to the choices in the *Group schedule by* section of the [Options \[pg:0542\]](#) tab. For example, if *All together* is selected, the statistics will be listed for the entire schedule. If *Site & Place* is selected, statistics will be listed for the schedule for each Place. Or if *Cluster* is selected, statistics will be listed for each Cluster.

This section does not appear when *Volunteer* is selected in the Group schedules by section of the [Options \[pg:0542\]](#) tab.

#### Number of unfilled openings

Check this option if you want to include the number of unfilled openings for the schedule or schedule section.

#### Number of filled schedule entries

Check this option if you want to include the number of filled openings for the schedule or schedule section.

#### Unduplicated count of scheduled volunteers

Check this option if you want to include a count for the number of volunteers listed on the schedule or schedule section. An unduplicated volunteer count means a volunteer scheduled for two or more assignments in the section will only be counted once. For more information on unduplicated volunteer counts, see [help topic 2115 \[pg:0452\]](#).

#### Print these statistics only (without the schedule)

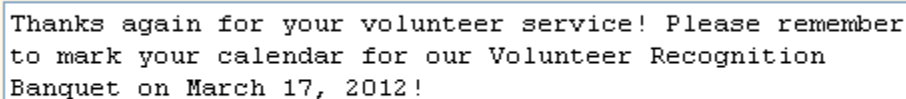
Check this option if you want the report to only list the statistics. The report will not include the volunteers scheduled, or the substitute and/or Coordinator lists. With this option, only the Top instructions and Bottom instructions fields will be listed along with the statistic fields selected.

## Bottom instructions

Use the Bottom instructions field to enter any directions or comments that should appear at the bottom of each schedule in the report.

In many cases, the Schedule report will be used to create a printable version of the schedule to give to volunteers or Coordinators. The Bottom instructions field provides a convenient way to list reminder messages for volunteers.

### Bottom instructions



Thanks again for your volunteer service! Please remember to mark your calendar for our Volunteer Recognition Banquet on March 17, 2012!

Enter any instructions you would like to appear at the bottom of the schedule

When you're finished choosing the Fields for your report, click **Next** to continue to the next step.

### Related help

[Help Topic 2223 \[pg:0467\]](#) - Creating custom reports

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## Include (Schedule Reports)

Help topic 1038

Added or revised 10-02-2014

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The options that appear on the Include tab for Schedule reports will vary depending on what is selected in the "Group schedules by" and "Format" sections of the Options tab. To learn about the choices available on the Options tab, please see [help topic 1039 \[pg:0542\]](#).

### Which assignments do you want to include schedules for?

This option will only appear if you have "Site," "Site & Place," or "Site, Place & Assignment" selected in the "Group schedules by" section of the Options tab. If you have any of the other options selected, you will not see the ability to include just certain assignments.

#### All active assignments

This will print the report for all assignments in your account that have the Active Status. [Inactive Assignments \[pg:0140\]](#) will not be included.

#### Only include

This will limit the report to just the Site, Place or Assignment you select from the dropdown list. Please see [help topic 2099 \[pg:0096\]](#) if you need more information on Sites, Places and Assignments.

### What month do you want to print the schedule for?

This option will appear when you select the "Monthly calendar" option in the Format section on the Options tab.

### This month

Select this option if you want to print the report for the current month.

### Next month

Select this option if you want to print the report for the next calendar month.

### Dropdown List

Select this option to choose a specific month and year.

### **Print the schedule starting with the XXXXXX in . . ."**

This option will appear when you select the "Weekly calendar" option in the Format section on the Options tab. The settings work in relation with the day of the week you select for the report to start with on the Options tab. For example, if you select to have the report start with Saturdays, but use the "The week of" option to select a date that is a Tuesday, the report will cover the Saturday through Friday period for the Saturday immediately after the Tuesday that is selected.

### This week

Select this option if you want to print the report for the most current seven day period starting with the weekday selected as the starting day on the Options tab. The dates that will be included on the report appear in parenthesis.

### Next week

Select this option if you want to print the report for the next seven day period starting with the weekday selected as the starting day on the Options tab. The dates that will be included on the report appear in parenthesis.

### The week of

Select this option to select a specific week for the report to include starting with the weekday selected as the starting day on the Options tab.

### **Which days do you want to print the schedule for?**

This option appears when you select the "Daily list" option in the Format section on the Options tab.

### Today

Select this option if you want to print the report for today's date.

### Tomorrow

Select this option if you want to print the report for tomorrow's date.

### The day after tomorrow

Select this option if you want to print the report for the date two days from today's date.

### Every day starting with:

Select the dates you want included in the report using the drop down tables. The report will include both dates selected as well as all dates in between.

### **Which volunteers do you want to include in this schedule?**

These options will only appear if you have "Volunteer" selected in the "Group schedules by" section of the Options tab. Use these fields if you want to limit the volunteers included on this report to just the selected volunteers.

#### Tagged volunteers

This checkbox is disabled unless you previously [tagged \[pg:1538\]](#) one or more volunteer records. Check this checkbox if you want the report to include schedules for the tagged volunteers.

These volunteers:

Check this checkbox if you want the report to include schedules for all of the volunteers you specify using the fields listed below. If you want this report to include service for all volunteers, be sure to check this checkbox.

Uncheck this checkbox *only* if you selected the Tagged volunteers checkbox, and you want this report to include only schedules for the tagged volunteers.

#### Status

Choose *Any* if you want this report to include schedules for volunteers regardless of what their **current Status** [\[pg:1832\]](#) is.

Choose *Any of these* if you want this report to include only schedules for volunteers whose **current Status** is one of those you check, then check the Statuses you want to include. With this selection the report will not include all volunteers scheduled, but only the volunteers whose Status matches the Status checkboxes you have checked.

#### Type

Choose *Any* if you want this report to include volunteers regardless of what their Type is.

Choose *Any of these* if you want this report to include only volunteers whose Type is one of those you check, then check the Types you want to include. With this selection the report will not include all volunteers scheduled, but only the volunteers whose Type is one of those you have checked.

The **Type** [\[pg:0212\]](#) field appears in the Name box on the Core tab, and it is typically used for classifying volunteers by major program type, such as "adult," "junior," "student," "regular," "occasional," "auxiliary," and so forth.

#### Kind

The Kind field is located on the Core tab in each volunteer record. It is used to show if a volunteer record is for an individual person or a **group** [\[pg:1909\]](#) that volunteers.

Select *Both individuals and groups* if you want the report to include both individuals and groups.

Select *Individuals only* if you want the report to only include individual volunteer records.

Select *Groups only* if you want the report to only include group volunteer records.

## Flags

Choose *Any* if you want this report to include volunteer schedules regardless of what Flags appear on their Core tab.

Choose *Any of these* if you want this report to include only volunteer schedules for volunteers who have **at least one** of the Flags you check, then check the Flags you want to include. With this selection the report will not include all volunteer schedules, but only the schedules for volunteers who have at least one of the Flags you have checked.

Choose *All of these* if you want this report to include only volunteer schedules for volunteers who have **all** of the Flags you check, then check the Flags you want to include. With this selection the report will not include a volunteer's schedule unless **all** of the Flags you check appear on his or her record.

Choose *Not any of these* if you want this report to include only volunteers who *do not* have any of the Flags selected on their record. A volunteer's schedule will only appear on the report if they do not have any of the Flags selected.

Flags [pg:0212] appear in the Flag box on the Core tab for each volunteer. Flags are typically used to classify volunteers into different overlapping groups, such as "Board of Directors," "donor," "sponsor," "day of caring," "red team," and so forth.

## Site

This option appears if you use [Site Level Access \[pg:0092\]](#) in Volgistics, and you have access to the volunteer records for all Sites in your organization.

Choose Any if you want this report to include schedules for volunteers regardless of which Site(s) they serve at.

Choose Any of these if you want this report to include only volunteer schedules for volunteers who serve at at least one of the Sites you check, then check Sites you want to include. With this selection the report will not include all volunteers scheduled, but only the volunteers who serve at at least one of the Sites you have checked.

## Set

Choose This set and the name of a [Set \[pg:0858\]](#) in the dropdown list to limit the volunteer schedules to just the volunteers who appear in that particular Set. With this selection the report will not include all volunteers scheduled, but only the volunteers who are scheduled and are included in the Set.

The Set can be used on its own to limit the volunteers or in connection with the other options selected on the Include page. You can find a description of how this works in [help topic 2184 \[pg:0863\]](#).

When you're finished choosing the Include options for your report click **Next** to continue to the next step.

## **Related help**

[Help Topic 2223 \[pg:0467\]](#) - Creating custom reports

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## Options (Schedule Reports)

Help topic 1039

Added or revised 04-04-2016

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The

### *Options*

page appears when you create a new report or modify an existing report. Use the controls on the Options page to customize the structure of a [Schedule \[pg:0547\]](#) report. Your selections here will also affect the choices available on the [Include \[pg:0538\]](#) tab of the report.

### **Group schedules by:**

Choose the way you would like to organize the information in your Schedule report.

#### All together

Choose *All together* if you want the schedule to list all scheduled volunteers and/or unfilled openings for the date range selected without separating Sites, Places or Assignments.

#### Site

Choose *Site* if you want the schedule to list all scheduled volunteers and/or unfilled openings for the date range selected organized by Site. Each Site's schedule will appear separately and you can optionally choose to have each Site's schedule start on a new page.

#### Site & Place

Choose *Site & Place* if you want the schedule to list all scheduled volunteers and/or unfilled openings for the date range selected organized by Site and then by Place. Each Place's schedule will appear separately and you can optionally choose to have each Place's schedule start on a new page.

#### Site, Place & Assignment

Choose *Site, Place & Assignment* if you want the schedule to list all scheduled volunteers and/or unfilled openings for the date range selected organized by Site, then by Place, and then by Assignment. Each Assignment's schedule will appear separately and you can optionally choose to have each Assignment's schedule start on a new page.

#### Cluster

Choose *Cluster* if you want the schedule to list all scheduled volunteers and/or unfilled openings for the date range selected organized by Cluster. Each Cluster's schedule will appear separately and you can choose to have each Cluster's schedule start on a new page. *Each Assignment will appear below the Cluster it is associated with regardless of the Site and Place it is located under.*

If you need more information on Assignment Clusters, please see [help topic 1114 \[pg:0934\]](#).

#### Cluster, Site, Place & Assignment

Choose *Cluster, Site, Place & Assignment* if you want the schedule to list all scheduled volunteers and/or unfilled openings for the date range organized by Cluster and then by Site, Place & Assignment. Each Assignment's schedule will appear separately and you can optionally choose to have each Assignment's schedule start on a new page. *Clusters that have Assignments under two different Sites and/or Places will have these Assignment's schedules listed separately.*

If you need more information on Assignment Clusters, please see [help topic 1114 \[pg:0934\]](#).

#### Volunteer

Choose

#### *Volunteer*

if you want the schedule report to show the schedules arranged by the volunteer's name. You can optionally choose to have each volunteer's schedule start on a new page. Use the settings on the [Include \[pg:0538\]](#) tab of this report to control which volunteers are included in this report. When this option is selected, you will not see the controls for printing unfilled openings below because only schedules for volunteers can be included.

#### **Page breaks:**

Select this option to control whether or not the schedule for each new section of the report starts on a new page. Use the *Group schedules by* options above to control how the sections of the report are arranged. The *Page breaks* option is not available when *All together* is selected in the *Group schedules by* options.

#### **Format:**

Choose the time periods for the way you would like to organize the information in your Schedule report.

#### Monthly calendar

Choose

#### *Monthly calendar*

if you want the schedule to cover one calendar month. You will be able to select which month is printed on the [Include \[pg:0538\]](#) tab.

#### Weekly calendar

Choose

#### *Weekly calendar*

if you want the schedule to cover a one week period. You will be able to select which week is printed on the [Include \[pg:0538\]](#) tab.

#### Daily list

Choose

#### *Daily list*

if you want the schedule to cover one day or a range of dates. You will be able to select which day or date range is printed on the [Include \[pg:0538\]](#) tab.



### **Include the schedule for these days of the week:**

Check the boxes for the days of the week (Sunday through Saturday) you want to have included in the report. Use this to make the schedule less complicated if the assignments you're interested in only occur on certain days. For example, you might have an assignment that only takes place on weekdays so you could choose not to include Saturday and Sunday in the report.

This option is only available if the *Monthly calendar* or *Weekly calendar* formats are selected in the Format section above.

### **Start with:**

Choose the day of the week you want the monthly or weekly schedule to start on from the dropdown table. This setting will not have any effect unless the day of the week selected here is also selected to be included in the report. For example, if you choose not to include Sunday in the *Include the schedule for these days of the week* option, then choosing Sunday here will not have any effect. The report will start on the next day of the week that is selected to be included.

This option is only available if the *Monthly calendar* or *Weekly calendar* formats are selected in the Format section above.

### **Calendar:**

Use the settings in this section to control the appearance of your schedule. This option is only available if the *Monthly calendar* or *Weekly calendar* formats are selected in the *Format* section above.

#### Create separate rows for each shift time

This option adds a column for shift times to the schedule with a row of information showing the details for each shift. When this is selected, the shift times do not appear in the schedule cell showing the volunteer's name and the other assignment information. This option is only available when *Weekly calendar* is selected in the *Format* section above.

#### Omit days of the week that have no schedule times

Choose this option if you only want the schedule to show information for days of the week where volunteers are scheduled and/or there are unfilled openings. For example, if you have an assignment that does not have any volunteers scheduled or unfilled openings (depending on your selections) on Tuesday, Tuesday will not be shown on the schedule for this assignment when this option is selected.

#### Print schedule times bold

Choose this option to make the schedule times appear in bold print on the report.

### **Print unfilled openings as:**

These settings control how openings that do not have a volunteer scheduled to fill them will appear on the schedule. These options will not appear when *Volunteer* is selected in the *Group schedules by* section above.

#### A blank cell

Choose this if you want unfilled openings to appear as a blank cell on the schedule.

## "Open"

Choose this if you want unfilled openings to appear with the word **Open** in the cell on the schedule.

## Omit unfilled openings

Choose this if you only want your schedule to show volunteers who are scheduled. Unfilled openings will not be shown when this is selected.

## Print unfilled openings only

Choose this if you only want your schedule to show unfilled openings. Scheduled volunteers will not be shown when this is selected so the **Fields tab** [pg:0534] will not include fields for selecting information about volunteers.

When you're finished choosing the Options for your report, click **Next** to continue to the next step.

## **Related help**

[Help Topic 2223 \[pg:0467\]](#) - Creating custom reports

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# Page Design (Schedule Reports)

Help topic 1040

Added or revised 03-20-2013

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The Page Design page appears when you create a new report or modify an existing report. Use the options on the Page Design page to customize the page formatting for your Schedule report.

## **Page size**

Use the drop down list to choose the paper size for this report. The default page size is "Letter."

## **Margin width**

Enter the size (in inches) of the margin you want to appear around the edge of the page. The default margin width is one half inch (0.5 inches).

## **Page orientation**

Choose the way you would like the pages of the report to be oriented, portrait or landscape.

## **First title line**

Type what you to appear for the report title. Report titles may be two lines long.

The report title appears at the top of the first page, and at the top of subsequent pages where the selected page breaks occur for the report.

## **Second title line**

Type what you to appear for the report title. Report titles may be two lines long.

The report title appears at the top of the first page, and at the top of subsequent pages where the selected page breaks occur for the report.

### **Add Site name**

Check this checkbox if you want the Site name to appear as part of the report title when a [site level operator \[pg:1442\]](#) prints a shared report. A shared report is a stock report, or a report created by the headquarters site for use by all sites. When you check this box, report titles will include the name of Site where the report was printed whenever the report is printed by a site-level operator. Do not check this box if you do not want shared reports which are printed by site-level-operators to include the Site name.

This option only appears if you use the [site-level-operators \[pg:0092\]](#) features.

### **Font name**

Use the drop down list to choose the name of the font you would like Volgistics to use for printing the report title.

### **Font size for 1st title line**

The report title may include two lines of text, and each line may be printed in a different font size. This enables you to have a larger main title, and smaller sub-title. Use the drop down list to choose the font size (in points) for the first title line.

### **Font size for the rest of the title**

The report title may include two lines of text, and each line may be printed in a different font size. This enables you to have a larger main title, and smaller sub-title. Use the drop down list to choose the font size (in points) for the second title line.

### **Logo & title locations**

Use the drop down list to choose the way you would like to arrange your organization's logo and the report title at the top of the page.

You may include your organization's logo if you installed a logo graphic file in your Volgistics account setup. [How to Upload Logo Graphics \[pg:1353\]](#) shows how to do this if you need help.

### **Body font name**

Use the drop down list to choose the font style for the text in the body of the report. The body of the report includes all of the report content except the report title.

### **Body font size**

Use the drop down list to choose the font size (in points) for the text in the body of the report. The body of the report includes all of the report content except the report title.

### **Lines**

Your report can include lines around the borders of the report. Choose *On* if you want this report to include lines, or *Off* if you prefer no lines. This option does not affect the content of the report except by adding or removing the line graphics.

Because this report is designed to list a schedule in calendar or day format, lines are included in the body of the report by default. So this setting only affects how the header portion of the report appears.

### **Date and time printed**

Choose *On* if you want this report to include the date and time the report was printed in the lower left corner of each page. Choose *Off* if you prefer not to have the date and time printed.

### **Page numbers**

Choose *On* if you want page numbers printed at the bottom of each page. Choose *Off* if you prefer not to have page numbers printed.

When you're finished choosing the page design for your report click **Next** to continue to the next step.

### **Related help**

[Help Topic 2223 \[pg:0467\]](#) - Creating custom reports

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## **Schedule Reports**

Help topic 8255

Added or revised 10-04-2016

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Schedule reports provide a way to list the schedules for your organization. These reports are useful to post at a volunteer location or to give to individual volunteers and/or Coordinators. You can also create sign-in sheets with these reports to help keep track of when volunteers serve.

Schedule reports provide many more ways to print the schedule than the *Printable View* link method. For example, you can choose to have the report cover a month, a week, a range of dates, or just a specific date. These reports can also be organized seven different ways: by Volunteer; Site; Site & Place; Site, Place & Assignment; Cluster; Cluster, Site, Place & Assignment and All together. Options are available to include unfilled openings on the schedule or to just list unfilled openings without showing the volunteers who are scheduled. Statistics such as to how many volunteers are scheduled, and filled and unfilled opening information, can be shown along with the schedule. Or you can run a report that just shows the statistics without the other schedule information.

These are examples of the [stock \[pg:0595\]](#) Schedule reports, however you can create many other report varieties from this format yourself. To do this, follow the directions under the To create a new Schedule report section at the end of this help topic.

**Daily sign-in sheets (stock)** [Details \[pg:0666\]](#)

## Volunteer Sign-in Sheet

Great Lakes Volunteers  
December 20, 2011

Volunteer	From	To	Assignment	Notes	Time in	Time out	Office use
Albertson, Melissa	1:00 a	8:00 a	Bus Driver				
Alpin, Jerrold	5:00 p	11:30 p	Emergency Assistant				
Alpin, Susan	1:00 p	3:00 p	Bus Driver				
Alterman, Allison	7:00 a	9:00 a	Volunteer Greeter				
Barclay, Andrea	5:30 a	8:30 a	Parking Lot Clean-up				
Coolidge, Sarahlyn	12:15 p	3:00 p	Emergency Assistant				
Dalman, Malinda	7:00 a	12:45 p	Coordinator and Chairperson	Needs t-shirt			
Decker, Marilyn	2:00 p	5:00 p	Landscaping	Report to M. Wilson, Rm 392 A			
Fitzgerald, Larry	5:00 p	7:00 p	Recreation Leader				
Franklin, Alvin	7:00 a	12:00 p	Emergency Assistant				
Franklin, Sara Page	6:00 p	8:00 p	Room				

Monthly schedules by assignment (stock) [Details \[pg:0661\]](#)

January 2012

Volunteer Schedule  
Great Lakes Volunteers

### Emergency Assistant (Great Lakes Community Hospital/South Campus)

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>	<b>7</b>
	7:00 a - 12:00 p Emergency Assistant Franklin, Alvin 12:15 p - 3:00 p Emergency Assistant Open 12:15 p - 3:00 p Emergency Assistant Open 5:00 p - 11:30 p Emergency Assistant Coolidge, Sarahlyn 5:00 p - 11:30 p Emergency Assistant Open	7:00 a - 12:00 p Emergency Assistant Nagleford, Fern 7:00 a - 12:00 p Emergency Assistant Open 1:00 p - 3:00 p Emergency Assistant Mandrake, Larry 12:15 p - 3:00 p Emergency Assistant Michelle, Limon 5:00 p - 11:30 p Emergency Assistant Alpin, Jerrold 5:00 p - 11:30 p Emergency Assistant Saxon, Lawrence	7:00 a - 12:00 p Emergency Assistant Franklin, Alvin 7:00 a - 12:00 p Emergency Assistant Nagleford, Fern Open 12:15 p - 3:00 p Emergency Assistant Open 5:00 p - 11:30 p Emergency Assistant Coolidge, Sarahlyn 5:00 p - 11:30 p Emergency Assistant	7:00 a - 12:00 p Emergency Assistant Bucholz Family 7:00 a - 12:00 p Emergency Assistant Franklin, Alvin 7:00 a - 12:00 p Emergency Assistant Open 1:00 p - 3:00 p Emergency Assistant Mandrake, Larry 12:15 p - 3:00 p Emergency Assistant Nagleford, Fern	7:00 a - 12:00 p Emergency Assistant Franklin, Alvin 12:15 p - 3:00 p Emergency Assistant Open 5:00 p - 11:30 p Emergency Assistant Jones, Lamont 5:00 p - 11:30 p Emergency Assistant Vanbeek, Allison 5:00 p - 11:30 p Emergency Assistant	

Monthly schedules by volunteer (stock) [Details \[pg:0664\]](#)

January 2012

Volunteer Schedule  
Great Lakes Volunteers

Vega, Melissa

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1	2 8:00 a - 12:00 p Information Desk	3 6:00 p - 8:00 p Room Visitor	4 5:00 p - 7:00 p Information Desk	5	6 8:00 a - 12:00 p Information Desk	7 9:00 p - 11:00 p Parking Lot Watch
8	9 8:00 a - 12:00 p Information Desk	10	11	12	13 8:00 a - 12:00 p Information Desk	14 9:00 p - 11:00 p Parking Lot Watch
15	16 8:00 a - 12:00 p Information Desk	17 6:00 p - 8:00 p Room Visitor	18 5:00 p - 7:00 p Information Desk	19	20 8:00 a - 12:00 p Information Desk	21 9:00 p - 11:00 p Parking Lot Watch
22	23 8:00 a - 12:00 p Information Desk	24	25	26	27 8:00 a - 12:00 p Information Desk	28 9:00 p - 11:00 p Parking Lot Watch
29	30 8:00 a - 12:00 p Information Desk	31				

Schedule statistics (stock) [Details \[pg:0668\]](#)

January 2012

Schedule Statistics  
Great Lakes Volunteers

**Recreation Assistant (Great Lakes Community Hospital/North Campus)**

Un-filled openings: 0  
Filled: 10  
Number of different volunteers scheduled: 2

**Recreation Leader (Great Lakes Community Hospital/North Campus)**

Un-filled openings: 0  
Filled: 18  
Number of different volunteers scheduled: 1

**Volunteer Greeter (Great Lakes Community Hospital/North Campus)**

Un-filled openings: 4  
Filled: 22  
Number of different volunteers scheduled: 2

Weekly schedules by assignment (stock) [Details \[pg:0663\]](#)

**Great Lakes Community Hospital  
North Campus  
Pet Therapy Program**

**Volunteer Schedule**  
Great Lakes Volunteers  
January 8, 2012 to January 14, 2012

Sunday January 8, 2012	Monday January 9, 2012	Tuesday January 10, 2012	Wednesday January 11, 2012	Thursday January 12, 2012	Friday January 13, 2012	Saturday January 14, 2012
2:00 p - 4:00 p Barclay, Andrea Dog & Cat Volunteers	3:00 p - 5:00 p Lupin, George Cat Volunteers Only	9:30 a - 11:00 a Bartowski, Mary Sue Dog & Cat Volunteers	9:00 a - 10:00 a Open Dog Volunteers Only	9:30 a - 11:00 a Bartowski, Mary Sue Dog & Cat Volunteers	3:00 p - 5:00 p Decker, Marilyn Cat Volunteers Only	2:00 p - 4:00 p Fourth Avenue Youth Group Dog & Cat Volunteers
2:00 p - 4:00 p Blackport, Henry Dog & Cat Volunteers	3:00 p - 5:00 p Rivera, Renea Cat Volunteers Only	9:30 a - 11:00 a Zambrano, Alphonso Dog & Cat Volunteers	3:00 p - 5:00 p Fitzgerald, Larry Cat Volunteers Only	9:30 a - 11:00 a Open Dog & Cat Volunteers	3:00 p - 5:00 p Open Cat Volunteers Only	2:00 p - 4:00 p Fourth Avenue Youth Group Dog & Cat Volunteers
2:00 p - 4:00 p Johnson, Catherine Dog & Cat Volunteers	6:00 p - 8:15 p Alpin, Jerrold Dog Volunteers Only	3:00 p - 5:00 p Lupin, George Cat Volunteers Only	3:00 p - 5:00 p Rivera, Renea Cat Volunteers Only	3:00 p - 5:00 p Lupin, George Cat Volunteers Only	6:00 p - 8:15 p Tomlinson, Jessica Dog Volunteers Only	2:00 p - 4:00 p Tomlinson, Jessica Dog & Cat Volunteers
2:00 p - 4:00 p Vanbeek, Allison Dog & Cat Volunteers	6:00 p - 8:15 p Nagleford, Fern Dog Volunteers Only	3:00 p - 5:00 p Rivera, Renea Cat Volunteers Only	6:00 p - 8:15 p Nagleford, Fern Dog Volunteers Only	3:00 p - 5:00 p Rivera, Renea Cat Volunteers Only	6:00 p - 8:15 p Open Dog Volunteers Only	2:00 p - 4:00 p Open Dog & Cat Volunteers
		6:00 p - 8:15 p Alpin, Jerrold Dog Volunteers Only	6:00 p - 8:15 p Open Dog Volunteers Only	6:00 p - 8:15 p Nagleford, Fern Dog Volunteers Only		
		6:00 p - 8:15 p Nagleford, Fern Dog Volunteers Only		6:00 p - 8:15 p Nagleford, Fern Dog Volunteers Only		

**Weekly schedules by volunteer (stock) Details [pg:0665]**

**Mandrake, Larry**

**Volunteer Schedule**  
Great Lakes Volunteers  
January 8, 2012 to January 14, 2012

Sunday January 8, 2012	Monday January 9, 2012	Tuesday January 10, 2012	Wednesday January 11, 2012	Thursday January 12, 2012	Friday January 13, 2012	Saturday January 14, 2012
	8:00 a - 12:00 p Information Desk	1:00 p - 3:00 p Emergency Assistant		8:00 a - 12:00 p Information Desk		
				1:00 p - 3:00 p Emergency Assistant		

**To create a new Schedule report:**

1. Choose Print from the [menu \[pg:0215\]](#).
2. Click on "Schedule," and then click on "Create a new schedule report."
3. Customize your report using the [Options \[pg:0542\]](#), [Fields \[pg:0534\]](#), [Page Design \[pg:0545\]](#), and [Include \[pg:0538\]](#) windows.

When you reach the Save window you can either save your report without printing it (by clicking the **Save** button) or save your report and print it now (by clicking the **Save and Print** button). Retrieve your printed report from your Volgistics Mailbox.

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## Fields (Service Detail Reports)

Help topic 1117

Added or revised 03-20-2013

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The *Fields* page appears when you create a new report or modify an existing report. Use the Fields page to choose the fields you want to appear on your Service Details report.

The fields that are provided on this page are dependent on the selections made on the Service Details report's Options tab. By default, the new report is organized by Site, Place & Assignment, and no volunteers are listed. Since volunteers are not listed, the Fields page does not include the volunteer record fields by default. Only the 'Choose the fields you want to appear in this report' heading appears above the service measure, 'Unduplicated volunteers count' [pg:0452] and 'Blank column' options. Choose which volunteer service measures to include, and whether an unduplicated volunteer count and blank column are necessary for your report.

If, on the report's Options page, the report was setup to be organized by Volunteer, or 'No' was *not* the selection made next to the 'List volunteers?' option, then the Fields page would appear differently. That is, in addition to the service measure fields, it would include the following sections:

### For each service record include...

Above the service measure fields section, the Service Details report Fields page would contain the fields in the image below, to be included for each service record:

#### **For each service record include...**

- |                                     |                                    |
|-------------------------------------|------------------------------------|
| <input type="checkbox"/> From date  | <input type="checkbox"/> Source    |
| <input type="checkbox"/> Time in    | <input type="checkbox"/> Batch     |
| <input type="checkbox"/> To date    | <input type="checkbox"/> Directive |
| <input type="checkbox"/> Time out   |                                    |
| <input type="checkbox"/> Site       |                                    |
| <input type="checkbox"/> Place      |                                    |
| <input type="checkbox"/> Assignment |                                    |

### For each volunteer include...

Beneath the service measure fields section of the Fields page, the volunteer record fields would be listed. Choose any fields you would like to appear on the report for each volunteer. Again, these field options are displayed only if you chose to include volunteers in the report.

Choose the fields for your report sparingly. Each field becomes a report column. You may choose more columns than can fit legibly from left to right a page. When this happens, Volgistics automatically extends your report to additional pages *right* before starting the next page *down*.

This report supports a maximum of 96 columns. If you choose more than 96 fields for your report, the 97th and subsequent fields are omitted.



## Related help

[Help Topic 2223 \[pg:0467\]](#) - Creating custom reports

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# Page Design (Service Detail Reports)

Help topic 1118

Added or revised 03-20-2013

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The Page Design page appears when you create a new report or modify an existing report. Use the options on the Page Design page to customize the page formatting for your Service Details report.

## Page size

Use the drop down list to choose the paper size for this report. The default page size is "Letter."

## Margin width

Enter the size (in inches) of the margin you want to appear around the edge of the page. The default margin width is one half inch (0.5 inches).

## Page orientation

Choose the way you would like the pages of the report to be oriented, portrait or landscape.

## Fit to page

When you check *Fit to page* Volgistics will attempt to fit all of your report onto a single page across. Reports will still extend to additional pages if Volgistics cannot fit all of the report content onto a single page using the smallest legible font.

## First title line

Second title line

Type what you to appear for the report title. Report titles may be two lines long.

You can optionally choose to *Insert the date range* for the report in lieu of the second title line. When you choose this option Volgistics will insert the current date range for the report as the second title line. For example, if you print a service report for March 2005 Volgistics inserts "March 2005" as the second line of the report title, if you select this feature. This saves you from having to re-type the titles of reports you run periodically for different time period, such as monthly service reports.

The report title appears at the top of the first page, and at the top of subsequent pages if you selected page breaks for the report.

## Add Site name

Check this checkbox if you want the Site name to appear as part of the report title when a [Site Level Operator \[pg:1442\]](#) prints a shared report. A shared report is a stock report, or a report created by the headquarters Site for use by all sites. When you check this box, report titles will include the name of Site where the report was printed whenever the report is printed by a Site Level Operator. Do not check this box if you do not want shared reports which are printed by Site Level Operators to include the Site name.

This option only appears if you use the [Site Level Access \[pg:0092\]](#) features.

### **Add Set name**

If you [print this report for different Sets \[pg:0863\]](#) of volunteers you can optionally make the name of the [Set \[pg:0858\]](#) you're printing appear in the report title by checking this checkbox. For example, if you're creating a 'name and address list' that you'll sometimes print for different Sets of volunteers and you check this checkbox, and then you print the report for a Set called "Auxiliary Volunteers," the words "Auxiliary Volunteers" will appear as part of the report title.

Do not check this checkbox if you never want Set names to appear as part of the report title when you print this report for specific Sets of volunteers.

### **Font name**

Use the drop down list to choose the name of the font you would like Volgistics to use for printing the report title.

### **First title font size**

Second title font size

The report title may include two lines of text, and each line may be printed in a different font size. This enables you to have a larger main title, and smaller sub-title. Use the drop down lists to choose the font size (in points) for the first and second title line lines.

### **Logo & title locations**

Use the drop down list to choose the way you would like to arrange your organization's logo and the report title at the top of the page.

You may include your organization's logo if you installed a logo graphic file in your Volgistics account setup.

### **Body font name**

Body font size

Use the drop down lists to choose the font style and font size (in points) for the text in the body of the report. The body of the report includes all of the report content except the report title.

If you also select *Fit to page*, Volgistics may adjust the size of the body font so the report will fit onto one page across.

### **Lines**

Your report can include lines around the border of the report and between report columns. Lines often make column oriented reports easier to read. Choose *On* if you want this report to include lines, or *Off* if you prefer no lines. This option does not affect the content of the report except by adding or removing the line graphics.

### **Date and time printed**

Choose *On* if you want this report to include the date and time the report was printed in the lower left corner of each page. Choose *Off* if you prefer not to have the date and time printed.

### **Page numbers**

Choose *On* if you want page numbers printed at the bottom of each page. Choose *Off* if you prefer not to have page numbers printed.

When you're finished choosing the page design for your report click **Next** to continue to the next step.

#### **Related help**

[Help Topic 2223 \[pg:0467\]](#) - Creating custom reports

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## **Include (Service Detail Reports)**

Help topic 1119

Added or revised 03-29-2016

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The *Include* page appears when you create a new report or modify an existing report. Use the options on the Include page to choose which volunteers or service records you want to *include* in your Service Details report.

### **What format do you want for this report?**

You can choose to create a Service Details report as either an Adobe PDF file, or as an Excel spread sheet file. Use this control to make this choice.

Choose "PDF" if you would like your report returned to you as an Adobe 'portable document' file. You can use Adobe reader to view and print your report.

Choose "Excel" if you would like your report returned to you as an Excel spread sheet file. You can use Microsoft Excel (or other spread sheet programs) to view and print the report.

### **Which *service* do you want to include in this report?**

This option permits system operators to choose the period of time that should be included in the report. By default, the 'Include service for the most recently ended month' option is selected. However, the second option - 'Include service for this period' - allows the operator to choose a specific month(s) or day(s) of service to be included in the report.

### **Only include service for this Directive**

This option appears only if you track Mandatory Service in Volgistics.

If you track mandatory service in Volgistics you can make this report include only the service volunteers performed toward the completion of their service mandate for a particular program. Choose the mandatory service program from the drop down list provided beneath the checkbox.

By checking this checkbox and choosing a mandatory service program, only service entries that list the selected mandatory service program appear on the report.

Select this option if you need to assess or report service performed in a specific mandatory service program. For example, if you require summer interns to perform 80 hours of service each summer, you can use this option to produce a report that includes only the service summer interns performed as part of this program.

### Only include service in...

If you want this report to include only volunteer service performed in a specific Site, Place, or Assignment, check this box and choose the Site, Place, or Assignment from the drop down list beneath the checkbox.

By checking this checkbox and choosing a Site, Place, or Assignment, only service entries that list the selected Site, Place, or Assignment in the Assignment field appear on the report.

Select this option if you need to report only the volunteer service performed at a specific Site, Place, or Assignment.

### Active vs. Inactive Assignments

By default, Service Summary reports include service information related to both active and **inactive Assignments** [pg:0140]. You can change the report to only include service information for active, or inactive, Assignments by selecting *Active assignments* or *Inactive assignments* instead of the default, *Both active and inactive assignments*.

### Which volunteers do you want to include in this report?

Use these fields if you want to limit the service included on this report to just the service performed by certain volunteers.

#### Tagged volunteers

This checkbox is disabled unless you previously tagged one or more volunteer records. Check this checkbox if you want the report to include volunteer service performed by the tagged volunteers.

These volunteers:

Check this checkbox if you want the report to include service for all of the volunteers you specify using the fields listed below. If you want this report to include service for *all* volunteers be sure to check this checkbox.

Uncheck this checkbox only if you selected the *Tagged volunteers* checkbox, and you want this report to include *only* volunteer service performed by the tagged volunteers.

### Status

Choose *Any* if you want this report to include volunteer service performed by volunteers regardless of what their **current** status is.

Choose *Any of these* if you want this report to include only volunteer service performed by volunteers whose **current** status is one of those you check, then check the statuses you want to include. With this selection the report will not include all volunteer service, but only the volunteer service performed by volunteers whose status matches the status checkboxes you have checked.

As a general rule you should always choose *Any* volunteer status (not *Any of these*) in service reports. This print range option is based on a volunteer's **current** status, which is not necessarily what their status was at the time they performed their service. Suppose, for example, you're running a 2003 service report. George Bailey's status may have been Active when he performed service in 2003, but his status might currently be Inactive. If you include only volunteers whose status is currently Active, your report would not include George Bailey's 2003 service (nor service for anyone else who is now Inactive). For this reason, you should never exclude volunteers based on their status unless you have a specific reason for wanting service reported only for volunteers who

*currently* have a particular status.

### Type

Choose *Any* if you want this report to include volunteer service performed by volunteers regardless of what their Type is.

Choose *Any of these* if you want this report to include only volunteer service performed by volunteers whose Type is one of those you check, then check the Types you want to include. With this selection the report will not include all volunteer service, but only the volunteer service performed by volunteers whose Type is one of those you have checked.

The Type field appears in the Name box on the Core tab, and it is typically used for classifying volunteers by major program type, such as 'adult,' 'junior,' 'student,' 'regular,' 'occasional,' 'auxiliary,' and so forth.

### Kind

The Kind field is located on the Core tab in each volunteer record. It is used to show if a volunteer record is for an individual person or a [group \[pg:1909\]](#) that volunteers.

Select *Both individuals and groups* if you want the report to include both individuals and groups.

Select *Individuals only* if you want the report to only include individual volunteer records.

Select *Groups only* if you want the report to only include group volunteer records.

### Flag

Choose *Any* if you want this report to include volunteer service performed by volunteers regardless of what Flags appear on their Core tab.

Choose *Any of these* if you want this report to include only volunteer service performed by volunteers who have at least one of the Flags you check, then check the Flags you want to include. With this selection the report will not include all volunteer service, but only the volunteer service performed by volunteers who have at least one of the Flags you have checked.

Flags appear in the Flag box on the Core tab for each volunteer. Flags are typically used to classify volunteers into different overlapping groups, such as 'board of directors,' 'donor,' 'sponsor,' 'day of caring,' 'red team,' and so forth.

### Site

This option appears if you use [Site Level Access \[pg:0092\]](#) in Volgistics, and you have access to the volunteer records for all Sites in your organization.

Choose *Any* if you want this report to include volunteer service performed by volunteers regardless of which Sites they serve at.

Choose *Any of these* if you want this report to include only volunteer service performed by volunteers who serve at at least one of the Sites you check, then check Sites you want to include. With this selection the report will not include all volunteer service, but only the volunteer service performed by volunteers who serve at at least one of the Sites you have checked. Note that, unless you limit the report to service performed in a certain Site, Place, or Assignment using the *Only include service in...* control, your report will include *all* of the service performed by volunteers who have one of the Sites you select listed in the Sites box on the Core tab, even if that service was performed at a different site.

When you're finished choosing the Include options for your report click **Next** to continue to the next step.

#### Related help

[Help Topic 2223 \[pg:0467\]](#) - Creating custom reports

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## Options (Service Detail Reports)

Help topic 1125

Added or revised 03-20-2013

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The

### *Options*

page appears when you create a new report or modify an existing report. Use the controls on this Options page to customize the structure of an [Service Details \[pg:0580\]](#) report.

### **Organize this report by**

Choose the way you would like to organize the volunteer service information on this report.

#### Volunteer

Choose *Volunteer* if you want to see service summarized by volunteer.

Choosing *Volunteer* causes the report to list each volunteer, along with their service totals for the months, quarters, or years included in the report. The volunteer's name appears in the first column, followed by any additional fields you choose, and then the volunteer's service totals.

You can optionally cause the report to start printing each Volunteer on a new page. This is useful if you want to distribute the report to each volunteer.

#### Site

Choose *Site* if you want to see service summarized by Site.

Choosing *Site* causes the report to list each Site in your database, followed by the volunteers who have service in (or are assigned to) an assignment under that Site. The Site name appears in the first report column, followed by the volunteer names, any additional fields you choose for the report, and then the volunteer's service totals for the months, quarters, or years included in the report. The report can include a subtotal for each volunteer and Site.

You can optionally cause the report to start printing each Site on a new page. This is useful if you want to distribute the report to each Site.

#### Site & Place

Choose *Site & Place* if you want to see service summarized by Place.

Choosing Site & Place causes the report to list each Site in your database, and all of the Places under each site. For each Place the report lists the volunteers who have service in (or are assigned to) an assignment under that Place. The Site name appears in the first report column, the Place name in the second column, followed by the volunteer names, any additional fields you choose for the report, and then the volunteer's service totals for the months, quarters, or years included. The report can include a subtotal for each volunteer, Place and Site.

You can optionally cause the report to start printing each Site or Place on a new page. This is useful if you want to distribute the report to each Site or Place.

#### Site, Place & Assignment

Choose *Site, Place & Assignment* if you want to see service summarized by Assignment.

Choosing Site, Place & Assignment causes the report to list each Site in your database, all of the Places under each site, and all of the Assignments under each Place. For each Assignment the report lists the volunteers who have service in (or are assigned to) the assignment. The Site name appears in the first report column, the Place name in the second column, the Assignment name in the third column, followed by the volunteer names, any additional fields you choose for the report, and then the volunteer's service totals for the months, quarters, or years included in the report. The report can include a subtotal for each volunteer, Assignment, Place and Site.

You can optionally cause the report to start printing each Site, Place, or Assignment on a new page. This is useful if you want to distribute the report to each Site, Place, or Assignment.

#### Type

Choose *Type* if you want to see service summarized by volunteer Type.

The Type field appears in the Name box on the Core tab. It is usually used to show a volunteer's classification within major divisions in a volunteer program, such as 'adult,' 'junior,' 'regular,' 'student' and so forth. Choosing Type causes the report list each volunteer Type followed by the list of volunteers of that type and their service subtotals for the months, quarters, or years included in the report. The report can include a subtotal for each volunteer and Type.

You can optionally cause the report to start printing each different Type on a new page.

#### Date

Choose *Date* if you want to see service summarized by Date.

Choosing Date causes the report to list each date in the time period you select, followed by the service recorded for that date. You can optionally cause the report to start printing each date on a new page.

#### Cluster

Choose *Cluster* if you want to see service summarized by [Assignment cluster \[pg:0934\]](#).

Choosing Cluster causes the report to list each Cluster in your database, followed by the service under that Cluster. The Cluster name appears in the first report column, followed by the volunteer names (if you choose to include them), any additional fields you choose for the report, and then the volunteer's service totals for the months, quarters, or years included in the report. The report can include a subtotal for each volunteer and each Cluster.

You can optionally cause the report to start printing each Cluster on a new page.

### Cluster, Site, Place & Assignment

Choose *Cluster, Site, Place & Assignment* if you want to see service summarized by Assignment Cluster, as well as Site, Place and Assignment.

Choosing Cluster, Site, Place & Assignment causes the report to list each Cluster in your database in the first column, followed by each Site that has an Assignment in that Cluster, each Place under that Site with an Assignment in that Cluster, each Assignment under that Site and Place that is in that Cluster, the volunteers who have service under that Assignment (if you choose to include volunteer names), any additional fields you choose for the report, and then the volunteer's service totals for the time period included in the report. The report can include a subtotal for each volunteer and Cluster.

You can optionally cause the report to start printing each Cluster on a new page.

### **List volunteers?**

Choose whether or not the report should list individual volunteers.

#### No

Choose *no* if you do not wish to have individual volunteer names and their service totals appear on the report. When you select no, the report prints only the service totals for the Site, Place, Assignment, or Type, depending on how you organize the report. This option does not appear if you organize the report by volunteer.

#### Only if they have service to report

Choose *Only if they have service to report* if you want to list just the volunteers who have one or more service entries during the selected month(s). Volunteers who had no service during the month(s) are not listed.

#### Even if they do not have service to report

Choose this option if you want to list volunteers even if they have no service during the month(s) selected for the report.

If you organize the report by Site, Place, or Assignment, you must choose the Roles for which you want to include volunteers if they do not have any service to report. For example, choose 'Assigned' if you want the report to list volunteers whose role in a given Site, Place, or Assignment is Assigned, even if they do not have any service to report during the selected month(s). On the other hand, you would not choose 'Former' if you did not want the report to list volunteers whose role in a given Site, Place, or Assignment is Former and they do not have any service to report during the month(s) selected.

### **Sort volunteers by**

Choose Name if you want volunteers listed alphabetically by last and first name. Choose PIN to list volunteers numerically according to their volunteer number. Choose Login name if you want volunteers listed alphabetically by their login name. Choosing PIN or login name does not automatically cause the report to include the PIN or login name fields, however you can add either of these fields to the report on the Fields window when you create or modify the report.

### **White space**



Choose *More* if you would like the report to include blank rows after each volunteer and other report break points. Choosing more white space may cause the report to have more pages, but it is generally easier to read. Choose *Less* if you do not want the report to include blank lines after each volunteer and at other report break points. Choosing less white space may cause the report to have fewer pages, but it is generally more difficult to read.

## Totals

Check *Grand totals at the bottom* if you want the report to include a grand total for each column at the end of the report. If the report is summarized by month, grand totals appear for each month. If the report is summarized by quarter, grand totals appear for each quarter. If the report is summarized by year, grand totals appear for each year. This option does not appear if the report includes page breaks.

Check *Include total columns* if you want the report to include columns on the right side of the report with grand totals for each Site, Place, Assignment, Type or volunteer (depending upon how you organize the report), for the period of time included in the report. For example, if you *include total columns* on a monthly report for January 2004 through December 2004, the report will have an additional column with the sum of the service reported from January 2004 through December 2004.

## Page breaks

Check *Start a new page for...* if you would like the report to start each new item on a new page. This option is tied to the way you organize the report. For example, if you organize the report volunteer, you can make the report start each volunteer on a new page. Inserting page breaks is useful if you want to distribute individual sections of the report to others.

When you're finished choosing the options for your report click **Next** to continue to the next step.

## Related help

[Help Topic 2223 \[pg:0467\]](#) - Creating custom reports

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# Service Details Reports

Help topic 8257

Added or revised 03-03-2015

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Service Details reports list the individual service records for the volunteers and time period you choose. These reports are useful for comparing database entries to external service information like time sheets, or seeing the individual dates volunteers served. They may include volunteer [hours \[pg:1581\]](#), [merit hours \[pg:1564\]](#) (if you use them), and any other [measures \[pg:1557\]](#) of volunteer service you track. They may also include the [service value \[pg:0034\]](#) and [FTE \[pg:1563\]](#) comparisons.

You can organize Service Details reports eight ways: by Volunteer; Site; Site & Place; Site, Place & Assignment; Type; Date; Cluster, and Cluster, Site, Place & Assignment. You can choose to list individual service entries for volunteers, just the totals for each volunteer, or just the subtotals for each Site, Place, Assignment, Type, or date.

Service details reports automatically include service for [archived \[pg:1819\]](#) volunteers (as long as the archived volunteer meets any [Include \[pg:0554\]](#) criteria you set for the report *and* the archived volunteer has service entries that fall within the time period the report covers). However, Service details reports will not include service for volunteer records you have [deleted \[pg:2016\]](#) entirely from your Volgistics database.

These are examples of the [stock \[pg:0595\]](#) Service Detail reports, however you can create many other report varieties from this format yourself.

**Assignment service details (stock) [Details \[pg:0614\]](#)**

Assignment Service Details								
March 2004								
Site	Place	Assignment	Volunteer	Service From Date	Service To Date	Hours		
Sample Organization Name	Administration	Info Desk	Applebe, Tom	03-06-2004	03-06-2004	4:00		
				03-10-2004	03-10-2004	2:30		
				03-05-2004	03-05-2004	1:27		
								7:57
			Bailey, Harry	03-05-2004	03-05-2004	3:00		
				03-18-2004	03-18-2004	2:00		
						5:00		
			Ballard, Elizabeth	03-06-2004	03-06-2004	3:30		
				03-05-2004	03-05-2004	3:30		
						7:00		
			Bennegin, Keshia	03-18-2004	03-18-2004	4:00		
				03-27-2004	03-27-2004	3:00		
03-31-2004	03-31-2004	2:15						
			9:15					

**Place service details (stock) [Details \[pg:0618\]](#)**

Service Details								
March 2004								
Site	Place	Volunteer	Service From Date	Service To Date	Service Assignment	Hours		
Sample Organization Name	Volunteer Office	Applebe, Tom	03-10-2004	03-10-2004	Special Events	2:30		
			03-18-2004	03-18-2004	Phones	4:27		
							6:57	
		Bailey, Harry	03-03-2004	03-03-2004	Phones	4:00		
			03-10-2004	03-10-2004	Special Events	2:00		
			03-10-2004	03-10-2004	Special Events	2:30		
							8:30	
			Total					86:30

Printed 04-27-2004 7:05 pm Page 6

**Type service details (stock) [Details \[pg:0616\]](#)**

Type Service Details					
March 2004					
Type	Volunteer	Service From Date	Service To Date	Service Assignment	Hours
Adult	Tom Applebe	03-03-2004	03-03-2004	Client Advocate	3:00
		03-06-2004	03-06-2004	Info Desk	4:00
		03-10-2004	03-10-2004	Info Desk	2:30
		03-10-2004	03-10-2004	Special Events	2:30
		03-05-2004	03-05-2004	Info Desk	1:27
		03-18-2004	03-18-2004	Phones	4:27
					<b>17:54</b>
	Harry Bailey	03-03-2004	03-03-2004	Phones	4:00
		03-06-2004	03-06-2004	Transporation Driver	3:00
		03-10-2004	03-10-2004	Special Events	2:00
		03-10-2004	03-10-2004	Special Events	2:30

**Volunteer service details (stock) Details [pg:0612]**

Volunteer Service Details				
March 2004				
Volunteer	Service From Date	Service To Date	Service Assignment	Hours
Applebe, Tom	03-03-2004	03-03-2004	Client Advocate	3:00
	03-06-2004	03-06-2004	Info Desk	4:00
	03-10-2004	03-10-2004	Info Desk	2:30
	03-10-2004	03-10-2004	Special Events	2:30
	03-05-2004	03-05-2004	Info Desk	1:27
	03-18-2004	03-18-2004	Phones	4:27
				<b>17:54</b>
Bailey, Harry	03-03-2004	03-03-2004	Phones	4:00
	03-06-2004	03-06-2004	Transporation Driver	3:00
	03-10-2004	03-10-2004	Special Events	2:00
	03-10-2004	03-10-2004	Special Events	2:30

**To create a new Service details report:**

1. Choose Print from the [menu \[pg:0215\]](#).
2. Click on "Service details," and then click on "Create a new Service details report."
3. Customize your report using the [Options, \[pg:0557\]](#) [Fields, \[pg:0551\]](#) [Page Design, \[pg:0552\]](#) and [Include \[pg:0554\]](#) windows.

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## Options (Service Summary Reports)

Help topic 1041

Added or revised 03-20-2013

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The

### *Options*

page appears when you create a new report or modify an existing report. Use the controls on this Options page to customize the structure of an [Service Summary \[pg:0580\]](#) report.

### **Organize this report by**

Choose the way you would like to organize the volunteer service information on this report.

#### Volunteer

Choose *Volunteer* if you want to see service summarized by volunteer.

Choosing Volunteer causes the report to list each volunteer, along with their service totals for the months, quarters, or years included in the report. The volunteer's name appears in the first column, followed by any additional fields you choose, and then the volunteer's service totals.

You can optionally cause the report to start printing each Volunteer on a new page. This is useful if you want to distribute the report to each volunteer.

#### Site

Choose *Site* if you want to see service summarized by Site.

Choosing Site causes the report to list each Site in your database, followed by the volunteers who have service in (or are assigned to) an assignment under that Site. The Site name appears in the first report column, followed by the volunteer names, any additional fields you choose for the report, and then the volunteer's service totals for the months, quarters, or years included in the report.. The report can include a subtotal for each volunteer and Site.

You can optionally cause the report to start printing each Site on a new page. This is useful if you want to distribute the report to each Site.

#### Site & Place

Choose *Site & Place* if you want to see service summarized by Place.

Choosing Site & Place causes the report to list each Site in your database, and all of the Places under each site. For each Place the report lists the volunteers who have service in (or are assigned to) an assignment under that Place. The Site name appears in the first report column, the Place name in the second column, followed by the volunteer names, any additional fields you choose for the report, and then the volunteer's service totals for the months, quarters, or years included. The report can include a subtotal for each volunteer, Place and Site.

You can optionally cause the report to start printing each Site or Place on a new page. This is useful if you want to distribute the report to each Site or Place.

### Site, Place & Assignment

Choose *Site, Place & Assignment* if you want to see service summarized by Assignment.

Choosing Site, Place & Assignment causes the report to list each Site in your database, all of the Places under each site, and all of the Assignments under each Place. For each Assignment the report lists the volunteers who have service in (or are assigned to) the assignment. The Site name appears in the first report column, the Place name in the second column, the Assignment name in the third column, followed by the volunteer names, any additional fields you choose for the report, and then the volunteer's service totals for the months, quarters, or years included in the report. The report can include a subtotal for each volunteer, Assignment, Place and Site.

You can optionally cause the report to start printing each Site, Place, or Assignment on a new page. This is useful if you want to distribute the report to each Site, Place, or Assignment.

### Type

Choose *Type* if you want to see service summarized by volunteer Type.

The Type field appears in the Name box on the Core tab. It is usually used to show a volunteer's classification within major divisions in a volunteer program, such as 'adult,' 'junior,' 'regular,' 'student' and so forth. Choosing Type causes the report list each volunteer Type followed by the list of volunteers of that type and their service subtotals for the months, quarters, or years included in the report. The report can include a subtotal for each volunteer and Type.

You can optionally cause the report to start printing each different Type on a new page.

### Cluster

Choose *Cluster* if you want to see service summarized by [Assignment cluster \[pg:0934\]](#).

Choosing Cluster causes the report to list each Cluster in your database, followed by the service under that Cluster. The Cluster name appears in the first report column, followed by the volunteer names (if you choose to include them), any additional fields you choose for the report, and then the volunteer's service totals for the time period included in the report. The report can include a subtotal for each volunteer and each Cluster.

You can optionally cause the report to start printing each Cluster on a new page.

### Cluster, Site, Place & Assignment

Choose *Cluster, Site, Place & Assignment* if you want to see service summarized by Assignment Cluster, as well as Site, Place and Assignment.

Choosing Cluster, Site, Place & Assignment causes the report to list each Cluster in your database in the first column, followed by each Site that has an Assignment in that Cluster, each Place under that Site with an Assignment in that Cluster, each Assignment under that Site and Place that is in that Cluster, the volunteers who have service under that Assignment (if you choose to include volunteer names), any additional fields you choose for the report, and then the volunteer's service totals for the time period included in the report. The report can include a subtotal for each volunteer and Cluster.

You can optionally cause the report to start printing each Cluster on a new page.

## **Summarize By**

### Fiscal year

Choose *Fiscal year* if you want volunteer service reported on a **fiscal year** [pg:0062] basis. The report will include a set of columns for each fiscal year you choose to include in the report.

### Calendar year

Choose *Calendar year* if you want volunteer service reported on a calendar year basis (that is, January through December). The report will include a set of columns for each calendar year you choose to include in the report.

### Quarter

Choose *Quarter* if you want volunteer service reported on a quarterly basis (that is, three month periods). The report will include a set of columns for each quarter you choose to include in the report.

### Month

Choose *Month* if you want volunteer service reported on a monthly basis. The report will include a set of columns for each month you choose to include in the report.

## **List volunteers?**

Choose whether or not the report should list individual volunteers.

### No

Choose *no* if you do not wish to have individual volunteer names and their service totals appear on the report. When you select no, the report prints only the service totals for the Site, Place, Assignment, or Type, depending on how you organize the report. This option does not appear if you organize the report by volunteer.

### Only if they have service to report

Choose *Only if they have service to report* if you want to list just the volunteers who have one or more service entries during the selected month(s). Volunteers who had no service during the month(s) are not listed.

### Even if they do not have service to report

Choose this option if you want to list volunteers even if they have no service during the month(s) selected for the report.

If you organize the report by Site, Place, or Assignment, you must choose the Roles for which you want to include volunteers if they do not have any service to report. For example, choose 'Assigned' if you want the report to list volunteers whose role in a given Site, Place, or Assignment is Assigned, even if they do not have any service to report during the selected month(s). On the other hand, you would not choose 'Former' if you did not want the report to list volunteers whose role in a given Site, Place, or Assignment is Former and they do not have any service to report during the month(s) selected.

## **Sort volunteers by**

Choose Name if you want volunteers listed alphabetically by last and first name. Choose PIN to list volunteers numerically according to their volunteer number. Choose Login name if you want volunteers listed alphabetically by their login name. Choosing PIN or login name does not automatically cause the report to include the PIN or login name fields, however you can add either of these fields to the report on the Fields window when you create or modify the report.

## White space

Choose *More* if you would like the report to include blank rows after each volunteer and other report break points. Choosing more white space may cause the report to have more pages, but it is generally easier to read. Choose *Less* if you do not want the report to include blank lines after each volunteer and at other report break points. Choosing less white space may cause the report to have fewer pages, but it is generally more difficult to read.

## Totals

Check *Grand totals at the bottom* if you want the report to include a grand total for each column at the end of the report. If the report is summarized by month, grand totals appear for each month. If the report is summarized by quarter, grand totals appear for each quarter. If the report is summarized by year, grand totals appear for each year. This option does not appear if the report includes page breaks.

Check *Include total columns* if you want the report to include columns on the right side of the report with grand totals for each Site, Place, Assignment, Type or volunteer (depending upon how you organize the report), for the period of time included in the report. For example, if you *include total columns* on a monthly report for January 2004 through December 2004, the report will have an additional column with the sum of the service reported from January 2004 through December 2004.

## Page breaks

Check *Start a new page for...* if you would like the report to start each new item on a new page. This option is tied to the way you organize the report. For example, if you organize the report volunteer, you can make the report start each volunteer on a new page. Inserting page breaks is useful if you want to distribute individual sections of the report to others.

When you're finished choosing the options for your report click **Next** to continue to the next step.

## Related help

[Help Topic 2223 \[pg:0467\]](#) - Creating custom reports

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## Fields (Service Summary Reports)

Help topic 1042

Added or revised 03-20-2013

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The

### *Fields*

page appears when you create a new report or modify an existing report. Use the Fields page to choose the fields you want to appear on your [Service Summary \[pg:0580\]](#) report.

For each (month, quarter, calendar year, fiscal year) list...

Choose the volunteer service measures you want to appear on the report for each month, quarter, or year reported. Your report will include a column for each item you select, and each month, quarter, or year in the report.

For more information about FTE comparisons, see [FTE \[pg:1563\]](#). For a definition of unduplicated volunteer counts, see [Unduplicated volunteer count \[pg:0452\]](#).

Check

#### *Prior year comparisons*

if you want the report to include a comparison of each month, quarter, or year to the same period in the previous year. For example, if you choose prior year comparisons for a monthly report, the report will include a column with service totals for January of the previous year, January of the current year, and a column that shows the [percentage increase or decrease \[pg:0575\]](#). Comparisons appear for every month, quarter, or year you include in the report, as well as each service measure you choose to include.

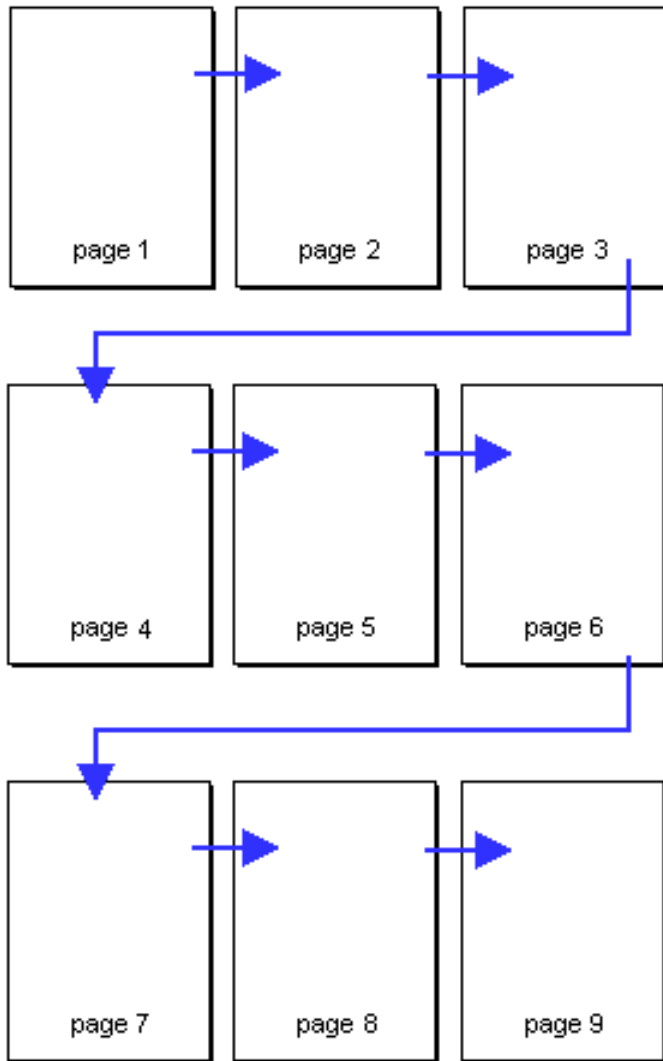
Check *Blank column* if you would like a blank column to print on the right-most edge of the report. A blank column is useful if you need to manually mark certain rows on the printed report for one reason or another.

#### For each volunteer include...

Choose any additional fields you would like on the report for each volunteer. These field options appear only if you chose to include volunteers in the report.

Choose the fields for your report sparingly. Each field becomes a report column. You may choose more columns than can fit legibly from left to right a page. When this happens, Volgistics automatically extends your report to additional pages *right* before starting the next page *down*, as shown in this illustration.





This report supports a maximum of 96 columns. If you choose more than 96 fields for your report, the 97th and subsequent fields are omitted.

**Related help**

[Help Topic 2223 \[pg:0467\]](#) - Creating custom reports

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## Page Design (Service Summary Reports)

Help topic 1043

Added or revised 03-20-2013

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The Page Design page appears when you create a new report or modify an existing report. Use the options on the Page Design page to customize the page formatting for your Service Summary report.

**Page size**

Use the drop down list to choose the paper size for this report. The default page size is "Letter."

## Margin width

Enter the size (in inches) of the margin you want to appear around the edge of the page. The default margin width is one half inch (0.5 inches).

## Page orientation

Choose the way you would like the pages of the report to be oriented, portrait or landscape.

## Fit to page

When you check *Fit to page* Volgistics will attempt to fit all of your report onto a single page across. Reports will still extend to additional pages if Volgistics cannot fit all of the report content onto a single page using the smallest legible font.

## First title line

Second title line

Type what you to appear for the report title. Report titles may be two lines long.

You can optionally choose to *Insert the date range* for the report in lieu of the second title line. When you choose this option Volgistics will insert the current date range for the report as the second title line. For example, if you print a service report for March 2005 Volgistics inserts "March 2005" as the second line of the report title, if you select this feature. This saves you from having to re-type the titles of reports you run periodically for different time period, such as monthly service reports.

The report title appears at the top of the first page, and at the top of subsequent pages if you selected page breaks for the report.

## Add Site name

Check this checkbox if you want the Site name to appear as part of the report title when a [Site Level Operator \[pg:1442\]](#) prints a shared report. A shared report is a stock report, or a report created by the headquarters Site for use by all Sites. When you check this box, report titles will include the name of Site where the report was printed whenever the report is printed by a Site Level Operator. Do not check this box if you do not want shared reports which are printed by Site Level Operators to include the Site name.

This option only appears if you use the [Site Level Access \[pg:0092\]](#) features.

## Add Set name

If you [print this report for different Sets \[pg:0863\]](#) of volunteers you can optionally make the name of the [Set \[pg:0858\]](#) you're printing appear in the report title by checking this checkbox. For example, if you're creating a 'name and address list' that you'll sometimes print for different Sets of volunteers and you check this checkbox, and then you print the report for a Set called "Auxiliary Volunteers," the words "Auxiliary Volunteers" will appear as part of the report title.

Do not check this checkbox if you never want Set names to appear as part of the report title when you print this report for specific Sets of volunteers.

## Font name

Use the drop down list to choose the name of the font you would like Volgistics to use for printing the report title.

### **First title font size**

Second title font size

The report title may include two lines of text, and each line may be printed in a different font size. This enables you to have a larger main title, and smaller sub-title. Use the drop down lists to choose the font size (in points) for the first and second title line lines.

### **Logo & title locations**

Use the drop down list to choose the way you would like to arrange your organization's logo and the report title at the top of the page.

You may include your organization's logo if you installed a logo graphic file in your Volgistics account setup.

### **Body font name**

Body font size

Use the drop down lists to choose the font style and font size (in points) for the text in the body of the report. The body of the report includes all of the report content except the report title.

If you also select *Fit to page*, Volgistics may adjust the size of the body font so the report will fit onto one page across.

### **Lines**

Your report can include lines around the border of the report and between report columns. Lines often make column oriented reports easier to read. Choose *On* if you want this report to include lines, or *Off* if you prefer no lines. This option does not affect the content of the report except by adding or removing the line graphics.

### **Date and time printed**

Choose *On* if you want this report to include the date and time the report was printed in the lower left corner of each page. Choose *Off* if you prefer not to have the date and time printed.

### **Page numbers**

Choose *On* if you want page numbers printed at the bottom of each page. Choose *Off* if you prefer not to have page numbers printed.

When you're finished choosing the page design for your report click **Next** to continue to the next step.

### **Related help**

[Help Topic 2223 \[pg:0467\]](#) - Creating custom reports

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## Include (Service Summary Reports)

Help topic 1044

Added or revised 03-29-2016

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The *Include* page appears when you create a new report or modify an existing report. Use the options on the Include page to choose which volunteers or service records you want to *include* in your Service Summary report.

### What format do you want for this report?

You can choose to create a Service summary report as either an Adobe PDF file, or as an Excel spread sheet file. Use this control to make this choice.

Choose "PDF" if you would like your report returned to you as an Adobe 'portable document' file. You can use Adobe reader to view and print your report.

Choose "Excel" if you would like your report returned to you as an Excel spread sheet file. You can use Microsoft Excel (or other spread sheet programs) to view and print the report.

### Which **fiscal year(s)** do you want to include in this report?

This option appears if the report is summarized by [fiscal year \[pg:0062\]](#).

Choose *Start with the earliest year that has service, end with the current year* if you would like the report to include a column for every fiscal year beginning with the earliest fiscal year for which your Volgistics database has a service entry, and ending with the current fiscal year. Intervening fiscal years appear on the report even if there are no service entries for that year. This option is appropriate if you want a historical report showing all recorded service.

Choose *Start with FY* if you do not want to include every year in the report. Select the fiscal year with which you would like the report to start, and the fiscal year with which you would like the report to end using the drop down lists provided. If you want the report to include just one fiscal year, choose the same year in the *Start with FY* and *End with FY* fields.

The calendar year in which a fiscal year begins is used to denote the fiscal year. For example, if your fiscal year begins on July 1st, fiscal year 2003 is the period July 1st 2003 through June 30, 2004.

### Which **calendar year(s)** do you want to include in this report?

This option appears if the report is summarized by calendar year.

Choose *Start with the earliest year that has service, end with the current year* if you would like the report to include a column for every year beginning with the earliest year for which your Volgistics database has a service entry, and ending with the current year. Intervening years appear on the report even if there are no service entries for that year. This option is appropriate if you want a historical report showing all recorded service.

Choose *Start with FY* if you do not want to include every year in the report. Select the year with which you would like the report to start, and the year with which you would like the report to end using the drop down lists provided. If you want the report to include just one year, choose the same year in the *Start with FY* and *End with FY* fields.

A calendar year begins on January 1st and ends on December 31st.

Which **quarter(s)** do you want to include in this report?

This option appears if the report is summarized by quarter.

Start with the quarter that begins on:

Use the drop down lists to choose the month and year of the quarter on which you want the report to begin. For example, if you want the report to begin with the second quarter in calendar year 2016 you would choose April 2016. One quarter is a three-month period that may begin on any month you choose. The quarter that begins with April 2016 includes April, May, and June 2016.

Include x quarters

Choose the number of quarters you want to appear on the report. Choose 1 if you would like the report to include just one quarter.

Which **month(s)** do you want to include in this report?

This option appears if the report is summarized by month.

Choose *All of the months so far in the current calendar year* if you would like the report to include each month that has passed so far in the current calendar year, including the current month. Your report will begin with January and end with the current month no matter which month it is when you print the report.

Choose

*All of the months so far in the current fiscal year*

if you would like the report to include each month that has passed so far in the current **fiscal year**, [pg:0062] including the current month. Your report will begin with the first month of your organization's current fiscal year and end with the current month no matter which month it is when you print the report.

Choose *Start with* if you would like to select a specific range of months for your report. Using the drop down lists provided, choose the month and year of the month you want the report to begin with in the *Start with* field, and the month and year of the month you would like the report to end on in the *End with* field. If you want the report to include just one month, choose the same month and year in the *Start with* and *End with* fields.

Only include service for this Directive

This option appears only if you track Mandatory Service in Volgistics.

If you track mandatory service in Volgistics you can make this report include only the service volunteers performed toward the completion of their service mandate for a particular program. Choose the mandatory service program from the drop down list provided beneath the checkbox.

By checking this checkbox and choosing a mandatory service program, only service entries that list the selected mandatory service program appear on the report.

Select this option if you need to assess or report service performed in a specific mandatory service program. For example, if you require summer interns to perform 80 hours of service each summer, you can use this option to produce a report that includes only the service summer interns performed as part of this program.

### Only include service in...

If you want this report to include only volunteer service performed in a specific Site, Place, or Assignment, check this box and choose the Site, Place, or Assignment from the drop down list beneath the checkbox.

By checking this checkbox and choosing a Site, Place, or Assignment, only service entries that list the selected Site, Place, or Assignment in the Assignment field appear on the report.

Select this option if you need to report only the volunteer service performed at a specific Site, Place, or Assignment.

### Active vs. Inactive Assignments

By default, Service Summary reports include service information related to both active and **inactive Assignments** [pg:0140]. You can change the report to only include service information for active, or inactive, Assignments by selecting *Active assignments* or *Inactive assignments* instead of the default, *Both active and inactive assignments*.

### Which volunteers do you want to include in this report?

Use these fields if you want to limit the service included on this report to just the service performed by certain volunteers.

#### Tagged volunteers

This checkbox is disabled unless you previously tagged one or more volunteer records. Check this checkbox if you want the report to include volunteer service performed by the tagged volunteers.

These volunteers:

Check this checkbox if you want the report to include service for all of the volunteers you specify using the fields listed below. If you want this report to include service for *all* volunteers be sure to check this checkbox.

Uncheck this checkbox only if you selected the *Tagged volunteers* checkbox, and you want this report to include *only* volunteer service performed by the tagged volunteers.

### Status

Choose *Any* if you want this report to include volunteer service performed by volunteers regardless of what their **current** status is.

Choose *Any of these* if you want this report to include only volunteer service performed by volunteers whose **current** status is one of those you check, then check the statuses you want to include. With this selection the report will not include all volunteer service, but only the volunteer service performed by volunteers whose status matches the status checkboxes you have checked.

As a general rule you should always choose *Any* volunteer status (not *Any of these*) in service reports. This print range option is based on a volunteer's **current** status, which is not necessarily what their status was at the time they performed their service. Suppose, for example, you're running a 2015 service report. George Bailey's status may have been Active when he performed service in 2015, but his status might currently be Inactive. If you include only volunteers whose status is currently Active, your report would not include George Bailey's 2015 service (nor service for anyone else who is now Inactive). For this reason, you should never exclude volunteers

based on their status unless you have a specific reason for wanting service reported only for volunteers who *currently* have a particular status.

### Type

Choose *Any* if you want this report to include volunteer service performed by volunteers regardless of what their Type is.

Choose *Any of these* if you want this report to include only volunteer service performed by volunteers whose Type is one of those you check, then check the Types you want to include. With this selection the report will not include all volunteer service, but only the volunteer service performed by volunteers whose Type is one of those you have checked.

The Type field appears in the Name box on the Core tab, and it is typically used for classifying volunteers by major program type, such as 'adult,' 'junior,' 'student,' 'regular,' 'occasional,' 'auxiliary,' and so forth.

### Kind

The Kind field is located on the Core tab in each volunteer record. It is used to show if a volunteer record is for an individual person or a [group \[pg:1909\]](#) that volunteers.

Select *Both individuals and groups* if you want the report to include both individuals and groups.

Select *Individuals only* if you want the report to only include individual volunteer records.

Select *Groups only* if you want the report to only include group volunteer records.

### Flag

Choose *Any* if you want this report to include volunteer service performed by volunteers regardless of what Flags appear on their Core tab.

Choose *Any of these* if you want this report to include only volunteer service performed by volunteers who have at least one of the Flags you check, then check the Flags you want to include. With this selection the report will not include all volunteer service, but only the volunteer service performed by volunteers who have at least one of the Flags you have checked.

Flags appear in the Flag box on the Core tab for each volunteer. Flags are typically used to classify volunteers into different overlapping groups, such as 'board of directors,' 'donor,' 'sponsor,' 'day of caring,' 'red team,' and so forth.

### Site

This option appears if you use [Site Level Access \[pg:0092\]](#) in Volgistics, and you have access to the volunteer records for all Sites in your organization.

Choose *Any* if you want this report to include volunteer service performed by volunteers regardless of which Sites they serve at.

Choose *Any of these* if you want this report to include only volunteer service performed by volunteers who serve at at least one of the Sites you check, then check Sites you want to include. With this selection the report will not include all volunteer service, but only the volunteer service performed by volunteers who serve at at least one of the Sites you have checked. Note that, unless you limit the report to service performed in a certain Site, Place, or Assignment using the *Only include service in...* control, your report will include *all* of the service performed by volunteers who have one of the Sites you select listed in the Sites box on the Core tab, even if that service was

performed at a different site.

When you're finished choosing the Include options for your report click **Next** to continue to the next step.

## Related help

[Help Topic 2223 \[pg:0467\]](#) - Creating custom reports

---

# Prior Year Comparison

Help topic 2114

Added or revised 04-18-2008

---

When you include *Prior year comparisons* on [Service summary \[pg:0580\]](#) reports, the report includes the percentage increase or decrease over the same period in the prior year. This topic explains how Volgistics calculates and prints these percentages.

[Service summary \[pg:0580\]](#) reports may contain service information on a monthly, quarterly, or annual basis. For each period they may also include *prior year comparisons* that show what the volunteer service was for the same period one year earlier, and how much it has changed in terms of percentage. Such comparisons help you understand changes in volunteer participation.

The following illustrations show how prior year comparisons appear in three different [Service summary \[pg:0580\]](#) reports: one monthly, one quarterly, and one annual.

## Monthly

Site	Place	Assignment	Jan 1999 Hours	Jan 2000 Hours	Change
Sample Organization Name	Administration	Info Desk	534:00	1,054:15	+ 97.4%
		Information services	56:00	76:00	+ 35.7%

In this example the report includes volunteer hours for January 2000. With prior year comparisons selected, the report also includes a column for the same period in the previous year (January 1999) plus a "Change" column that shows the percentage increase or decrease between the two months. As you can see, the report shows a 97.4% increase in volunteer hours at the "Info Desk" from January 1999 to January 2000, and a 35.7 percent increase in volunteer hours served in "Information Services" for the same period. [Service summary \[pg:0580\]](#) reports may include a single month, or a range of months. If you choose to include prior year comparisons, the comparisons appear for every month in the report.

## Quarterly

Site	Place	Assignment	Jan 1999 To Mar 1999 Hours	Jan 2000 To Mar 2000 Hours	Change
Sample Organization Name	Administration	Info Desk	1,068:00	2,231:15	+ 108.9%
		Information services	112:00	82:00	- 26.8%



The report in this example is quarterly. It includes volunteer hours for the first quarter of 2000 (January 2000 through March 2000). With prior year comparisons selected, the report also includes a column for the same period in the previous year (January 1999 through March 1999), plus a "Change" column that shows the percentage increase or decrease between the two quarters. [Service summary \[pg:0580\]](#) reports may include a single quarter, or a range of quarters. If you choose to include prior year comparisons, the comparisons appear for every quarter in the report.

## Annual

Site	Place	Assignment	1999 Hours	2000 Hours	Change
Sample Organization Name	Administration	Info Desk	5,068:00	7,292:00	+ 43.9%
		Information services	209:00	179:00	- 14.4%

The annual report shown here includes volunteer hours for all of 2000. With prior year comparisons selected the report also includes a column for the same period last year (all of 1999), plus a "Change" column that shows the percentage increase or decrease between the two years. [Service summary \[pg:0580\]](#) reports may include a single year, or a range of years. If you choose to include prior year comparisons, the comparisons appear for every year in the report.

## How the math works

While you never need to perform any math yourself when using this report, you might want to understand how these percentages are derived. Volgistics uses standard math for calculating the percentage change in the two values. It subtracts the prior period value from the current period value, divides the result by the prior period value, and then multiplies that result by 100.

Here's an example: Suppose your report has 1,000 hours of service in January 2003, and 1,100 hours in January 2004. To calculate the percentage increase, the report starts by subtracting the prior period value (January 2003) from the current period value (January 2004):

$$1,100 - 1,000 = 100$$

The result is 100, which means there were 100 more hours served in January 2004 than in January 2003. Next, the report divides the result (100) by the prior year value of 1,000:

$$100/1000 = 0.1$$

Finally, the report multiplies the decimal result by 100 to get the percentage:

$$0.1 \times 100 = 10\%$$

Since this value represents an increase in service, the report displays it as a positive value, like this:

$$+ 10\%$$

Volgistics uses the same math when there is a decrease in service. Here's another example: Suppose you track how many courses volunteers instruct. Your report shows 250 'courses instructed' in 2003, and 200 courses instructed in 2004. Since the second value, 200, is smaller than the prior year value of 250 there is a decrease in service. To calculate this percentage decrease, the report starts by subtracting the prior period value from the

current period value:

$$200 - 250 = -50$$

The result is negative 50, which means there were 50 fewer courses instructed in 2004 than in 2003. Next the report divides negative 50 by the prior year value of 250:

$$-50/250 = -0.2$$

Finally, the report multiplies the decimal result by 100 to get the percentage:

$$-0.2 \times 100 = -20\%$$

Since this value represents a *decrease* in service the report displays it as a negative value, like this:

$$- 20\%$$

If your report has a non-zero number for the current period, but a zero for the same period in the prior year, the report always shows a 100% increase.

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## How do I print a monthly volunteer hour report?

Help topic 2284

Added or revised 12-30-2015

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You can print a monthly hour report for volunteers using a [stock report \[pg:0595\]](#) like this:

1. Choose Print from the [menu \[pg:0215\]](#).
2. Click *Service summary*.
3. Select *Monthly service by volunteer (stock)*. This is a stock report that will include volunteer service for a month (or period of months) you choose.

Sets

**Print**

Mailbox

Who's Here

Setup

Welcome

Help

Exit

+ Excel spreadsheet

+ Service details

- Service summary

[Examples](#)

[Create a new service summary report](#)

[Service by Cluster](#)

[Service Summary Months YTD](#)

[All service by assignment \(stock\)](#)

[All service by type \(stock\)](#)

[All service by volunteer \(stock\)](#)

[Monthly service by assignment \(stock\)](#)

[Monthly service by type \(stock\)](#)

[Monthly service by volunteer \(stock\)](#)


[Monthly service comparison by assignment \(stock\)](#)

[Monthly service comparison by type \(stock\)](#)

[Monthly service comparison by volunteer \(stock\)](#)

[Service value \(stock\)](#)

+ Statistics



4. Click the **Print it** button.

5. On the *Include* page, under *Which month(s) do you want to include on this report* select *Start with* and then choose the month (or months) you want the report to include. For example, to print a report that includes only December 2015 hours, choose December 2015 through December 2015.

**Include** [Help](#)

What format do you want for this report?

PDF (Adobe Portable Document Format)

Excel (Microsoft Excel spreadsheet)

Which **month(s)** do you want to include in this report?

All of the months so far in the current calendar year

All of the months so far in the current fiscal year

Start with:    
End with:

Only include service for this Directive

Only include service in

6. Click the **Start printing** button.

Your report will be delivered to the [In Box \[pg:0303\]](#) of your Volgistics mailbox shortly.

#### Related help

[Help Topic 2285 \[pg:0579\]](#) - How do I print a monthly hour report by assignment?

[Help Topic 2223 \[pg:0467\]](#) - Creating custom reports

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## How do I print a monthly hour report by assignment?

Help topic 2285

Added or revised 12-30-2015

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You can print a monthly hour report by assignment using a [stock report \[pg:0595\]](#) like this:

1. Choose Print from the [menu \[pg:0215\]](#).
2. Click *Service summary*.
3. Select *Monthly service by assignment (stock)*. This is a stock report that will include service by assignment for the month (or period of months) you choose.

The screenshot shows a sidebar menu on the left with the following items: Print (highlighted in orange), Mailbox, Who's Here, Setup, Welcome, Help, and Exit. The main content area is titled 'Service summary' and contains a list of report options, each with a document icon. A red arrow points to the option 'Monthly service by assignment (stock)'. Below the list is a '+ Statistics' button.

- Print
- Mailbox
- Who's Here
- Setup
- Welcome
- Help
- Exit

**Service summary**

- Examples
- [Create a new service summary report](#)
- [Service by Cluster](#)
- [Service Summary Months YTD](#)
- [All service by assignment-calendar yr \(stock\)](#)
- [All service by assignment-fiscal yr \(stock\)](#)
- [All service by type \(stock\)](#)
- [All service by volunteer \(stock\)](#)
- [Monthly service by assignment \(stock\)](#)
- [Monthly service by type \(stock\)](#)
- [Monthly service by volunteer \(stock\)](#)
- [Monthly service comparison by assignment \(stock\)](#)
- [Monthly service comparison by type \(stock\)](#)
- [Monthly service comparison by volunteer \(stock\)](#)
- [Service value \(stock\)](#)

**+ Statistics**

4. Click the **Print it** button.

5. On the *Include* page, under *Which month(s) do you want to include on this report* select *Start with* and then choose the month (or months) you want to print. For example, to print a report that includes only December 2015 hours, choose December 2015 through December 2015.

**Include** [Help](#)

What format do you want for this report?

PDF (Adobe Portable Document Format)

Excel (Microsoft Excel spreadsheet)

Which **month(s)** do you want to include in this report?

All of the months so far in the current calendar year

All of the months so far in the current fiscal year

Start with:   End with:

Only include service for this Directive

Only include service in

6. Click the **Start printing** button.

Your report will be delivered to the [In Box \[pg:0303\]](#) of your Volgistics mailbox shortly.

#### Related help

[Help Topic 2284 \[pg:0577\]](#) - How do I print a monthly volunteer hour report?

[Help Topic 2223 \[pg:0467\]](#) - Creating custom reports

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## Service Summary Reports

Help topic 8258

Added or revised 05-17-2016

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Service summary reports list volunteer service for monthly, quarterly or annual periods you specify.

These reports are useful for printing monthly, or annual volunteer service reports for distribution to management, boards or committees, or others interested in monitoring the extent of volunteer service over time. They may include volunteer [hours \[pg:1581\]](#), [merit hours \[pg:1564\]](#) (if you use them), and any other [measures \[pg:1557\]](#) of volunteer service you track. They may also include the [service value \[pg:0034\]](#), [FTE \[pg:1563\]](#) comparisons, [unduplicated volunteer counts, \[pg:0452\]](#) and [prior year comparisons. \[pg:0575\]](#)

You can organize Service summary reports seven ways: by Volunteer; Site; Site & Place; Site, Place & Assignment; Type; Cluster, and Cluster, Site, Place & Assignment. You can choose to list individual volunteers and their sub-totals, or just the sub-totals for each Site, Place, Assignment, or Type.

Service summary reports automatically include service for [archived \[pg:1819\]](#) volunteers (as long as the archived volunteer meets any [Include \[pg:0571\]](#) criteria you set for the report *and* the archived volunteer has service entries that fall within the time period the report covers). However, Service summary reports will not include service for volunteer records you have [deleted \[pg:2016\]](#) entirely from your Volgistics database.

Stock Service summary reports:

**All service by assignment-calendar yr (stock) [Details \[pg:0673\]](#)**

All Service By Assignment-Calendar Yr.						
Your Agency Name						
Site	Place	Assignment	2012 Hours	2013 Hours	2014 Hours	Total Hours
Heart Center	Heart Center	Cardiovascular Waiting Room	1,501:00	1,620:00	1,580:00	4,701:00
		Information Desk	1,814:18	1,924:00	1,884:00	5,622:18
		<b>Total</b>	<b>3,315:18</b>	<b>3,544:00</b>	<b>3,464:00</b>	<b>10,323:18</b>
<b>Total</b>			<b>3,315:18</b>	<b>3,544:00</b>	<b>3,464:00</b>	<b>10,323:18</b>
Main Hospital	Administration	Advisory Council	134:00	192:00	192:00	518:00
		Board Meeting	242:00	466:00	470:00	1,178:00
		Department Assistant	1,556:30	1,832:00	1,784:00	5,172:30

**All service by assignment-fiscal yr (stock) [Details \[pg:0620\]](#)**

All Service By Assignment-Fiscal Yr.						
Your Agency Name						
Site	Place	Assignment	FY 12-13 Hours	FY 13-14 Hours	FY 14-15 Hours	Total Hours
Heart Center	Heart Center	Cardiovascular Waiting Room	1,616:00	1,620:00	904:00	4,140:00
		Information Desk	1,836:00	1,936:00	1,076:00	4,848:00
		<b>Total</b>	<b>3,452:00</b>	<b>3,556:00</b>	<b>1,980:00</b>	<b>8,988:00</b>
<b>Total</b>			<b>3,452:00</b>	<b>3,556:00</b>	<b>1,980:00</b>	<b>8,988:00</b>
Main Hospital	Administration	Advisory Council	164:00	192:00	112:00	468:00
		Board Meeting	352:00	476:00	270:00	1,098:00
		Department Assistant	1,664:00	1,832:00	1,024:00	4,520:00

**All service by type (stock) [Details \[pg:0622\]](#)**

All Service By Type						
Sample Organization Name						
Type	FY 2000 Hours	FY 2001 Hours	FY 2002 Hours	FY 2003 Hours	FY 2004 Hours	Total Hours
Adult	7,483:00	4,339:00	1,457:00	6,867:00	756:48	20,702:48
Junior	101:00	919:45	626:15	2,803:00	854:09	5,003:09
<b>Grand total</b>	<b>7,584:00</b>	<b>5,258:45</b>	<b>1,982:15</b>	<b>9,270:00</b>	<b>1,610:57</b>	<b>25,705:57</b>

**All service by volunteer (stock) [Details \[pg:0624\]](#)**

All Service By Volunteer						
Sample Organization Name						
Volunteer	FY 2000 Hours	FY 2001 Hours	FY 2002 Hours	FY 2003 Hours	FY 2004 Hours	Total Hours
Applebe, Tom	1,008:15	501:45	108:45	451:30	83:00	2,153:15
Bailey, Harry	11:00	114:00	207:30	984:45	110:12	1,427:27
Bailey, Mary	12:30	326:30	110:45	482:30	36:45	949:00
Ballard, Elizabeth	0:00	216:30	97:15	376:00	60:30	750:15
Demaggio, Martin	0:00	96:45	110:45	471:45	0:15	880:30

**Monthly service comparison by assignment (stock) [Details \[pg:0626\]](#)**

Monthly Service Comparison By Assignment									
January 2004 to February 2004									
Site	Place	Assignment	Jan 2003 Hours	Jan 2004 Hours	Change	Feb 2003 Hours	Feb 2004 Hours	Change	Total Hours
Main Campus	Administration	Info Desk	122:30	142:51	+ 16.6%	176:30	83:36	- 52.6%	226:27
		Information services	111:30	4:00	- 96.4%	46:30	32:00	- 31.2%	36:00
		Records	36:00	24:30	- 31.9%	46:30	12:36	- 72.9%	37:06
		Speaker's Bureau	0:00	9:30	+ 100%	0:00	0:00	0%	9:30
	Total	270:00	180:51	- 33.0%	269:30	128:12	- 52.4%	309:03	
	Client Services	Client Advocate	0:00	22:00	+ 100%	0:00	24:21	+ 100%	46:21

**Monthly service comparison by type (stock) [Details \[pg:0628\]](#)**

Monthly Service Comparison By Type							
January 2004 to February 2004							
Type	Jan 2003 Hours	Jan 2004 Hours	Change	Feb 2003 Hours	Feb 2004 Hours	Change	Total Hours
Adult	292:15	567:24	+ 94.1%	299:15	230:33	- 20.3%	797:57
Junior	85:30	0:00	- 100.0%	108:30	0:00	- 100.0%	0:00
Grand total	377:45	567:24	+ 50.2%	397:45	230:33	- 42.0%	797:57

**Monthly service comparison by volunteer (stock) [Details \[pg:0630\]](#)**

Monthly Service Comparison By Volunteer							
January 2004 to February 2004							
Volunteer	Jan 2003 Hours	Jan 2004 Hours	Change	Feb 2003 Hours	Feb 2004 Hours	Change	Total Hours
Applebe, Tom	16:00	69:06	+ 360.7%	21:00	24:30	+ 16.7%	545:06
Bailey, Harry	31:00	67:06	+ 116.5%	42:00	35:36	- 15.2%	1,087:27
Bailey, Mary	16:00	63:15	+ 321.7%	22:15	4:00	- 82.0%	529:45
Ballard, Elizabeth	16:45	19:00	+ 13.4%	23:15	34:00	+ 46.2%	429:00

Monthly service by assignment (stock) [Details \[pg:0632\]](#)

Monthly Service By Assignment								
January 2004 to February 2004								
Site	Place	Assignment	Jan 2004 Hours	Jan 2004 Volunteer Count	Feb 2004 Hours	Feb 2004 Volunteer Count	Total Hours	Total Volunteer Count
Main Campus	Administration	Info Desk	142:51	14	83:36	7	226:27	14
		Information services	4:00	1	32:00	1	36:00	1
		Records	24:30	3	12:36	1	37:06	3
		Speaker's Bureau	9:30	3	0:00	0	9:30	3
		Total	180:51	14	128:12	8	309:03	14

Monthly service by type (stock) [Details \[pg:0634\]](#)

Monthly Service By Type							
January 2004 to February 2004							
Type	Jan 2004 Hours	Jan 2004 Volunteer Count	Feb 2004 Hours	Feb 2004 Volunteer Count	Total Hours	Total Volunteer Count	
Adult	567:24	14	230:33	14	797:57	14	
Junior	0:00	0	0:00	0	0:00	0	
Grand total	567:24	14	230:33	14	797:57	14	

Monthly service by volunteer (stock) [Details \[pg:0636\]](#)

Monthly Service By Volunteer			
January 2004 to February 2004			
Volunteer	Jan 2004 Hours	Feb 2004 Hours	Total Hours
Applebe, Tom	69:06	24:30	93:36
Bailey, Harry	67:06	35:36	102:42
Bailey, Mary	63:15	4:00	67:15
Ballard, Elizabeth	19:00	34:00	53:00



**Service values (stock) Details** [\[pg:0637\]](#)

<b>Service Value</b>				
January 2003 to December 2003				
Site	Place	Assignment	FY 2003 Hours	FY 2003 Hours Value
Main Campus	Administration	Info Desk	3,756:15	\$45,075.00
		Information services	940:45	\$11,289.00
		Records	1,043:15	\$12,519.00
		Speaker's Bureau	0:00	\$0.00
		Total	5,740:15	\$88,883.00
	Client Services	Client Advocate	0:00	\$0.00

**To create a new Service summary report:**

1. Choose Print from the [menu](#) [\[pg:0215\]](#).
2. Click on "Service summary," and then click on "Create a new Service summary report."
3. Customize your report using the [Options](#), [\[pg:0563\]](#) [Fields](#), [\[pg:0566\]](#) [Page Design](#), [\[pg:0568\]](#) and [Include](#) [\[pg:0571\]](#) windows.

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## Options (Statistic Reports)

Help topic 1063

Added or revised 03-20-2013

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Use the Statistics report's Options tab to customize the report's structure.

### Report by:

Select the appropriate button to choose whether statistics should be reported in one set of numbers representing the entire agency, or if they should also be categorized into groups, separated by either volunteer Type or by Site.

### Begin each report section on a new page

If the data is customized to be reported by either Type or Site, checking the "Begin each report section on a new page" button will cause the report to print the data for each volunteer Type or Site on a new page.

### Include a report column for each month

Checking the "Include a report column for each month" option will break Statistics out by month if a time period longer than one month is indicated on the report's [Include \[pg:0589\]](#) page.

### Include archived volunteer records

Archived volunteers can be included in the Statistics report by checking the "Include archived volunteer records" box.

When you're finished choosing the Options for your Statistics report, click **Next** to continue to the next step.

### Related help

[Help Topic 2223 \[pg:0467\]](#) - Creating custom reports

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## Fields (Statistic Reports)

Help topic 1082

Added or revised 03-20-2013

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Use the Statistics report's Fields page to choose the fields you want to appear on this report.

*Status statistics*

Include Status statistics for:


- Active
- Applicant
- Inactive
- LOA
- Prospect
- Sick
- Vacation

First mark the boxes next to the names of all Statuses for which you want to include statistics in this report. You can include Status statistics for one or more of the [Statuses \[pg:1832\]](#) tracked by your organization. For each Status checked in this section of the Statistics report's Fields page, the number of volunteers who had that Status either (a) at some point during the month(s) selected or (b) on the last day of the month(s) selected will be generated.

 Count the volunteers who had the status *at anytime* during the month

Choose *Count the volunteers who had the status at any time during the month* to include in your report the number of volunteers who had the selected Status(es) at any point throughout the month(s) included in the report.

For example, if you choose this option for a Statistics report reflecting Status statistics for October 2007, the report's "Active" count shows the number of volunteers who were Active on any date in October 2007, not necessarily the number of volunteers who were active on the last date of October 2007 or on the date the report was run. Therefore, a volunteer who was "Active" from October 1 through October 15 but was given the Status of "Inactive" on October 16 will be counted in both the "Active" and "Inactive" Status statistics in this report. For this reason, while accurately reflecting the number of volunteers who had each Status at some point during the report time period, the total number of volunteers counted in each of the Statuses in this report may not equal the actual total number of volunteers in the system during this time period.

 Count the volunteers who had the status on the *last day* of the month

Choose *Count the volunteers who had the status on the last day of the month* if you would like the report to include the number of volunteers in each Status on the last date of the month(s) reflected in this report. When you choose this option, the numbers are a snapshot of the Statuses assigned on a specific date. Also keep in mind that the sum of volunteers listed for each Status used by an organization will equal that of the number of volunteers in the system at the end of the time period included in the report.

It is important to recognize that information for deleted volunteer records will not be included in this, or any, Volgistics report. For example, if a volunteer had the Status of "Inactive" on October 31, 2007 but their record was deleted from the system on November 2, a Statistics report for October 2007 run after the record was deleted on November 2 will not reflect the deleted volunteer record at all.

In addition to providing counts for the Statuses selected, the report also includes a "Total" number, which represents all volunteers.

Mark the "Average time in status" box to see the average amount of time volunteers have had their Status. This appears on the report in a "years/days" format.

#### Service statistics

### Service statistics

Volunteers with any service recorded

Average number of hours served

Per month

Per week

1st service break point: 5 ▼

2nd service break point: 10 ▼

3rd service break point: 15 ▼

4th service break point: 0 ▼

5th service break point: 0 ▼

6th service break point: 0 ▼

7th service break point: 0 ▼

8th service break point: 0 ▼

Use this section to include counts of volunteers who have completed specified numbers of hours.

Mark the "Volunteers with any service recorded" box to generate a count of any volunteers (in the Statuses specified above) who completed service in the time period specified on the report's Include tab.

You can produce the average number of hours volunteers served either per month or per week by checking the "Average number of hours served" box and marking the appropriate time box. Then choose up to eight break points for average hours from the service break point drop down fields.

For example, if you choose to include average number of hours served per month and you enter a 1st service break point of 5, a 2nd service break point of 10 and a 3rd service break point of 15, then your report will contain the numbers of volunteers who have an average number of zero hours per month, an average of up to 5 hours per month, an average of 6 - 10 hours per month, an average of 11 - 15 hours per month, and an average of 16 or more hours per month.

### Profile tab fields

Age

1st age break point:

2nd age break point:

3rd age break point:

4th age break point:

5th age break point:

6th age break point:

7th age break point:

8th age break point:

Youngest and oldest age

Average age

Use this section to choose whether or not you want to include the personal information stored on the volunteer record's Profile tab.

To generate the number of volunteers within specified age ranges, check the "Age" box and use the age break point drop down fields to enter the ages that should end age categories. For example, if you choose to include age and you enter a 1st age breaking point age of 24, a 2nd age breaking point age of 39, and a 3rd age breaking point age of 54, then your report will contain the numbers of volunteer whose ages are between birth and 24 years old, between 25 and 39, between 40 and 54, and 55 and older. The number of volunteers with an unknown age will also be included.

You can also optionally include the youngest and oldest age and the average age of your included volunteers by checking the appropriate boxes.

Finally, any information (other than that tracked in text fields) on the Personal box on the volunteer record's Profile tab can optionally be included. This may include such items as Gender, Education, Marital Status, etc. For guidance on managing the fields on this box, see [help topic 2017 \[pg:0957\]](#).

When you're finished choosing the Fields for your report, click **Next** to continue to the next step.

#### Related help

## Include (Statistic Reports)

Help topic 1089

Added or revised 10-02-2014

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Use the Statistics report's Include page to choose the report's format (PDF or Excel) and which time period and volunteers you want to include in it.

### What format do you want for this report?

Choose to create this report as either an Adobe PDF file, or as an Excel spread sheet file. Use this control to make this choice.

Select "PDF" if you would like the report to be sent to the Volgistics Mailbox as an Adobe 'portable document' file. Use Adobe reader to view and print the report.

Choose "Excel" if you would like the report to be sent to the Volgistics Mailbox as an Excel spread sheet file. Use Microsoft Excel (or another spread sheet program) to view and print the report.

### What period do you want to include in this report?

Use this section to choose whether you want to include statistics for the most recently ended month (which is the default for this report) or for a period of months and years chosen from the drop down fields in this section of the page.

### Which volunteers do you want to include in this report?

Choose which volunteers you want to appear on this report.

#### Tagged volunteers

This checkbox is disabled unless you previously [tagged \[pg:1529\]](#) one or more volunteer records. Check this checkbox if you want the report to include the tagged volunteers.

#### These volunteers:

Uncheck this box only if you've checked the *Tagged volunteers* checkbox and you want this report to include *only* the tagged volunteers.

Check this checkbox to include *all* volunteers, or just the volunteers specified using the following controls:

#### Status

Choose *Any* to include volunteers regardless of what their **current** status is.

Choose *Any of these* to include volunteers whose **current** status is one of those you check, then check the statuses you want to include.

#### Type

Choose *Any* to include volunteers regardless of what their Type is.

Choose *Any of these* to include only volunteers whose Type is one of those you check, then check the Types you want to include.

The Type field appears in the Name box on the [Core tab \[pg:1868\]](#), and it is typically used for classifying volunteers by major program type, such as 'adult,' 'junior,' 'student,' 'regular,' 'occasional,' 'auxiliary,' and so forth.

### Kind

The Kind field is located on the Core tab in each volunteer record. It is used to show if a volunteer record is for an individual person or a [group \[pg:1909\]](#) that volunteers.

Select *Both individuals and groups* if you want the report to include both individuals and groups.

Select *Individuals only* if you want the report to only include individual volunteer records.

Select *Groups only* if you want the report to only include group volunteer records.

### Flag

Choose *Any* to include volunteers regardless of what Flags appear on their Core tab.

Choose *Any of these* to include only volunteers who have at least one of the Flags you check, then check the Flags you want to include.

Flags appear in the Flag box on the [Core tab \[pg:1868\]](#) for each volunteer. Flags are typically used to classify volunteers into different overlapping groups, such as 'board of directors,' 'donor,' 'sponsor,' 'day of caring,' 'red team,' and so forth.

### Site

This option appears if you use [Site Level Access \[pg:0092\]](#) in Volgistics, and you have access to the volunteer records for all Sites in your organization.

Choose *Any* to include volunteers regardless of which Sites they serve at.

Choose *Any of these* to include only volunteers who serve at one or more of the Sites you check, then check Sites you want to include.

### Set

Check this option, and then select a [Set \[pg:0858\]](#) to include only the volunteers in a certain Set.

When you're finished choosing the Include options for the Statistics report, click **Next** to continue to the next step.

### **Related help**

[Help Topic 2223 \[pg:0467\]](#) - Creating custom reports

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## Page Design (Statistic Reports)

Help topic 1103

Added or revised 03-20-2013

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Use the Statistics report Page design tab to customize the page formatting for your Statistics report.

### Page size

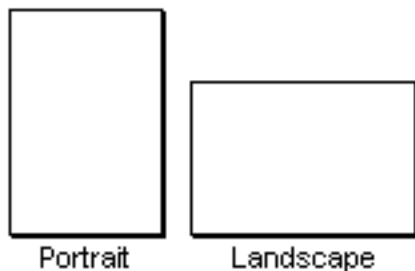
Use the drop down list to choose the paper or envelope size for this report. The default page size is "Letter."

### Margin width

Enter the size (in inches) of the margin you want to appear around the edge of the page. The default margin width is one half inch (0.5 inches).

### Page orientation

Choose the way you would like the pages of the report to be oriented, portrait or landscape.



### Fit to page

When you check *Fit to page* Volgistics will attempt to fit all of your Statistics report onto a single page across. Reports will still extend to additional pages if Volgistics cannot fit all of the report content onto a single page using the smallest legible font.

### First title line

Second title line

Type what you want to appear for the Statistics report title. Report titles may be two lines long.

The report title appears at the top of the first page, and at the top of subsequent pages if the report supports page breaks and you selected page breaks for the report.

### Add Site name

Check this checkbox if you want the Site name to appear as part of the report title when a [Site Level Operator \[pg:1442\]](#) prints a shared report. A shared report is a stock report, or a report created by the headquarters Site for use by all Sites. When you check this box, report titles will include the name of the Site where the report was printed whenever the report is printed by a Site Level Operator. Do not check this box if you do not want shared reports printed by Site Level Operators to include the Site name.



This option only appears if you use the [Site Level Access \[pg:0092\]](#) features.

### **Add Set name**

If you [print this report for different Sets \[pg:0863\]](#) of volunteers you can optionally make the name of the [Set \[pg:0858\]](#) you're printing appear in the report title by checking this checkbox.

Do not check this checkbox if you never want Set names to appear as part of the report title when you print this report for specific Sets of volunteers.

### **Font name**

Use the drop down list to choose the name of the font you would like Volgistics to use for printing the report title.

### **Font size for 1st title line**

Font size for the rest of the title

If there is more than one line of text in the report title, the first line may be printed in a different font size from the rest of title. This enables you to have a larger main title, and smaller sub-title. Use the drop down lists to choose the font size (in points) for the first title line and subsequent title lines.

### **Logo & title locations**

Use the drop down list to choose the way you would like to arrange your organization's logo and the report title at the top of the page.

You may include your organization's logo on selected reports if you installed a logo graphic file in your Volgistics account setup.

### **Body font name**

Body font size

Use the drop down lists to choose the font style and font size (in points) for the text in the body of the report. The body of the report includes all of the report content except the report title.

If you also select *Fit to page*, Volgistics may adjust the size of the body font so the report will fit onto one page across.

### **Lines**

Column style reports can include lines around the border of the report and between report columns. Lines often make column oriented reports easier to read. Choose *On* if you want this report to include lines, or *Off* if you prefer no lines. This option does not affect the content of the report except by adding or removing the line graphics.

### **Date and time printed**

Choose *On* to include the date and time the report was printed in the lower left corner of each page. Choose *Off* if you prefer not to have the date and time printed.

### **Page numbers**

Choose *On* to print page numbers at the bottom of each page. Choose *Off* if you prefer not to print page numbers.

## Corner index

Reports that list volunteers alphabetically can include an index in the lower right corner of each page that shows which last names appear on that page, alphabetically. This makes it easier to locate particular volunteers by name on reports that includes multiple pages. For example, a page that begins with "Bailey, George" and ends with "Cabot, Anita" might have a corner index of **B-Ca**, indicating that the page includes all of the volunteers whose last names fall within **B** and **Ca** alphabetically.

Choose *On* if you want this corner index printed at the bottom of each page. Choose *Off* if you prefer not to have this corner index printed.

When you're finished choosing the page design for your Statistics report click **Next** to continue to the next step.

## Related help

[Help Topic 2223 \[pg:0467\]](#) - Creating custom reports

---

## Statistics Reports

Help topic 8266

Added or revised 05-20-2016

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Statistics reports are designed to help you get data on things such as volunteer retention and demographics. Volgistics comes with two [stock \[pg:0595\]](#) Statistics reports. You can learn more about these below:

**Status Statistics (stock)** [Details \[pg:0678\]](#)

Status Statistics	
Your Agency Name	
Statistic	Apr 2016
Total count	222
Inactive count	4
Active count	199
LOA count	3
Applicant count	14
Prospect count	2
Became Inactive	1
Became Active	6
Became LOA	0
Became Applicant	6
Became Prospect	2
<b>Average time in status</b>	
Inactive (years/days)	4/305
Active (years/days)	5/353
LOA (years/days)	1/339
Applicant (years/days)	
Prospect (years/days)	

Volunteer Age Statistics	
Your Agency Name	
Statistic	Apr 2016
Total count	160
<b>Ages</b>	
Birth to 10	0
Ages 11 - 15	1
Ages 16 - 18	3
Ages 19 - 20	9
Ages 21 - 30	35
Ages 31 - 50	47
Ages 51 - 65	19
Ages 66 and over	45
Age unknown	1
Youngest	15
Oldest	89
Average age	48

By default, Statistics reports only contain data for [non-archived \[pg:0709\]](#) records. You can modify the report to contain information for archived records also, as well as change the setup to look for other statistical information.

To customize a stock report, click the **Clone it** button after you select the name of the report from the Print menu.

Or you can create a custom Statistics report from scratch by:

1. Select Print from the menu.
2. Expand the *Statistics* link.
3. Select *Create a new statistics report*.
4. Go through each of the tabs and select the options you want.
5. Save the report on the Save tab.

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# Stock Reports

Help topic 2104

Added or revised 09-30-2016

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Your Volgistics account comes with a series of standard, ready to run reports called

*stock*

reports. These reports meet the common reporting needs of many volunteer programs; however, they are not the only reports you can print. In addition to stock reports, you can customize your own Volgistics reports. [Help topic 2223 \[pg:0467\]](#) explains one way to do this. You can also clone a copy of a stock report to customize. The *To Customize a Stock Report* section of this help topic shows how to do this.

In order to be sure stock reports are always available, and work as they were originally designed, they have these limitations:

- You cannot delete stock reports.
- You cannot change the kinds of data included in the original stock reports. (You can change the appearance of stock reports by modifying the font size, font style, or margins. And you always get to choose which volunteers, assignments, or coordinators stock reports include.)

Stock reports are handy because they're already setup and ready to run. If there's a stock report that's not quite what you need but it's close, you can customize your own report without altering the original stock report.

## **Stock Report Samples**

Click a link below to see the stock reports for that category:

[Address labels \[pg:0483\]](#)

[Assignment profile \[pg:0492\]](#)

[Awards \[pg:0504\]](#)

[Batch report \[pg:0599\]](#)

[Excel spread sheet \[pg:0513\]](#)

[Labels \[pg:0523\]](#)

[Name tags \[pg:0531\]](#)

[Schedule \[pg:0547\]](#)

[Service details \[pg:0560\]](#)

[Service summary \[pg:0580\]](#)

[Statistics \[pg:0593\]](#)

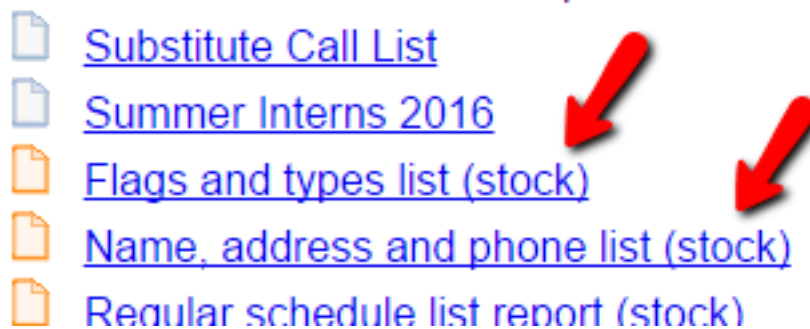
[Volunteer list \[pg:0692\]](#)

[Volunteer profile \[pg:0703\]](#)

### **To Print a Stock Report**


Here are the steps to follow to print a stock report:

1. Choose Print from the [menu \[pg:0215\]](#).
2. Click on the kind of report you want to print. For example, click *Volunteer List* if you want to print a list of volunteers.
3. Click on the name of the stock report you want to print. Stock reports are those that include (*stock*) in the report name. You can also tell which reports are stock reports by the orange page icon that appears next to the report name.



4. Once you choose the stock report you want to print, Volgistics asks if you want to "Print it," "Modify it," "Clone it," or see an "Example" of it. Click the **Print it** button.

What would you like to do?

-   Print this report now
- Show me an example of this report
- Make setup changes to this report
- Create a new report based on this report
  
- Return to the Print window

This report was:

Created or last modified: November 16, 2012 7:51 AM

5. Use the *Include* tab to choose which records you want to include on the report. Once you select the records you want to include click the **Start printing** button.

Note: If the **Start printing** button appears disabled, you have not checked any of the checkboxes under *Which volunteers do you want to include in this report?* Check at least one of these checkboxes to continue.

6. Volgistics begins preparing your report as soon as you click **Start Printing**. When it's complete, Volgistics delivers your report to your Volgistics mailbox. See [How reports print \[pg:0446\]](#) for more information.

### **To Change the Appearance of a Stock Report**

To change the appearance of a stock report:

1. Choose Print from the [menu \[pg:0215\]](#).
2. Click on the kind of report you want. For example, click *Volunteer List* if you want to change the appearance of a volunteer list report.
3. Click on the name of the stock report you want to change.
4. Click the **Modify it** button. This opens the Page Design window.
5. Use the [Page Design \[pg:0451\]](#) window to change the appearance of the report.
6. Click the **Save** button to save your changes.

Changes you make to the Page Design for a stock report will appear for all [System Operators \[pg:0065\]](#) in your account who uses the report.

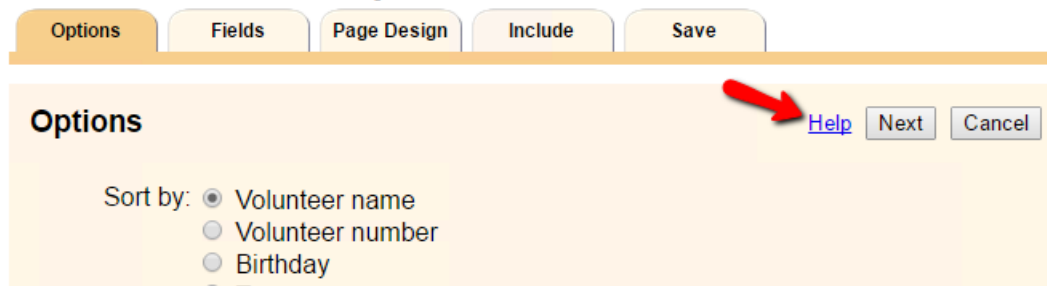
## **To Customize a Stock Report**

If there is a stock report that is close to what you need, you can clone the report. This creates a new report with the same format and field selections. The new report can be customized to meet your needs.

To clone a stock report:

1. Choose Print from the menu.
2. Click the kind of report you want. For example, click *Volunteer List* if you want to customize a volunteer list report.
3. Click the name of the stock report you want to change.
4. Click the **Clone it** button.
5. Change the settings on the Options, Fields, Page design and Include tabs to meet your needs. You can click the "Help" link that appears on the top and bottom of each page for more information about the settings on that page.

### **Name, address and phone list**



Options Fields Page Design Include Save

**Options** [Help](#) Next Cancel

Sort by:  Volunteer name  
 Volunteer number  
 Birthday

6. You can save your report with a unique name on the Save tab so you do not need to re-create it again. Click either the **Save** button to save the report without printing it or the **Save and Print** button to save the report and print it now.

## **Related Videos**

# Batch Report (stock)

Help topic 8001

Added or revised 12-21-2011

Use the Batch report to view a listing of each hour entry posted in a particular batch with the [Post \[pg:1559\]](#) feature. A Batch Report contains all service information included in a posted batch. This type of report is often used to compare posted information to the information on a written time sheet.

Great Lakes Volunteers		Batch Report		
Batch number: 54		Internal Volgetics Account		
Posted: 12-05-2011 10:01 am				
Posted by: Lawrence Larson				
Volunteer	Assignment	Date	Hours	Ment Hours
Albertson, Melissa	Front Desk [Great Lakes Community Hospital/North Campus]	12-03-2011	2.00	2.00
Alpin, Jerrod	Parking Lot Clean-up [Great Lakes Community Hospital/South Campus]	12-03-2011	3.00	3.00
Alpin, Susan	Parking Lot Clean-up [Great Lakes Community Hospital/South Campus]	12-03-2011	3.00	3.00
Alpin, Susan	Front Desk [Great Lakes Community Hospital/North Campus]	12-03-2011	2.00	2.00
Alterman, Allison	Parking Lot Clean-up [Great Lakes Community Hospital/South Campus]	12-03-2011	4.00	4.00
Barclay, Andrea	Emergency Assistant [Great Lakes Community Hospital/South Campus]	12-03-2011	4.00	4.00
Bartowski, Mary Sue	Emergency Assistant [Great Lakes Community Hospital/South Campus]	12-03-2011	4.00	4.00
Bucholz, Tim	Emergency Assistant [Great Lakes Community Hospital/South Campus]	12-03-2011	4.00	4.00
Coolidge, Sarahlyn	Room Visitor [Great Lakes Community Hospital/South Campus]	12-03-2011	3.00	3.00
Dalman, Malinda	Front Desk [Great Lakes Community Hospital/North Campus]	12-03-2011	2.00	2.00
Decker, Marilyn	Landscaping [Great Lakes Community Hospital/Maintenance]	12-03-2011	1.50	1.50
Fitzgerald, Larry	Surgery Waiting Room Monitor [Great Lakes Community Hospital/North Campus]	12-03-2011	2.00	2.00
Franklin, Alvin	Emergency Assistant [Great Lakes Community Hospital/South Campus]	12-03-2011	3.00	3.00
Gillette, Sara Page	Speaker's Bureau [Great Lakes Community Hospital/Administrator]	12-03-2011	3.00	3.00
Good, Michelle	Parking Lot Watch [Great Lakes Community Hospital/South Campus]	12-03-2011	3.00	3.00
Hocksteter, Marvin	Speaker's Bureau [Great Lakes Community Hospital/Administrator]	12-03-2011	2.00	2.00
Jeter, Susan	Parking Lot Clean-up [Great Lakes Community Hospital/South Campus]	12-03-2011	3.00	3.00
Johnson, Catherine	Front Desk [Great Lakes Community Hospital/North Campus]	12-03-2011	3.00	3.00
Jones, Lamont	Parking Lot Clean-up [Great Lakes Community Hospital/South Campus]	12-03-2011	2.00	2.00
Jones, Lamont	Surgery Waiting Room Monitor [Great Lakes Community Hospital/North Campus]	12-03-2011	2.00	2.00
Joplin, Jessica	Emergency Assistant [Great Lakes Community Hospital/South Campus]	12-03-2011	2.00	2.00
Lawrence, Virginia	Pet Therapy Program [Great Lakes Community Hospital/North Campus]	12-03-2011	3.00	3.00
Lemon, Arthur	Emergency Assistant [Great Lakes Community Hospital/South Campus]	12-03-2011	2.00	2.00
Lynch, Wilma	Front Desk [Great Lakes Community Hospital/North Campus]	12-03-2011	6.00	6.00
Malba, Jessica	Emergency Assistant [Great Lakes Community Hospital/South Campus]	12-03-2011	2.00	2.00
Mancorke, Larry	Front Desk [Great Lakes Community Hospital/North Campus]	12-03-2011	3.00	3.00
McCord, Sarah	Parking Lot Clean-up [Great Lakes Community Hospital/South Campus]	12-03-2011	4.00	4.00
McCorky, Sara Ann	Room Visitor [Great Lakes Community Hospital/South Campus]	12-03-2011	3.00	3.00
Melvin, Leonard	Emergency Assistant [Great Lakes Community Hospital/South Campus]	12-03-2011	4.00	4.00
Moore, Allison	Speaker's Bureau [Great Lakes Community Hospital/Administrator]	12-03-2011	4.00	4.00
Nagleford, Fern	Surgery Waiting Room Monitor [Great Lakes Community Hospital/North Campus]	12-03-2011	4.00	4.00
Nederweld, Louise	Pet Therapy Program [Great Lakes Community Hospital/North Campus]	12-03-2011	3.00	3.00
Saoniewsky, Larry	Emergency Assistant [Great Lakes Community Hospital/South Campus]	12-03-2011	4.00	4.00
Sato, Karie	Surgery Waiting Room Monitor [Great Lakes Community Hospital/North Campus]	12-03-2011	3.00	3.00
Simmons, Bernadette	Front Desk [Great Lakes Community Hospital/North Campus]	12-03-2011	6.00	6.00
Tomlinson, Jessica	Emergency Assistant [Great Lakes Community Hospital/South Campus]	12-03-2011	4.00	4.00
Vanbeek, Allison	Room Visitor [Great Lakes Community Hospital/South Campus]	12-03-2011	3.00	3.00
Vega, Melissa	Front Desk [Great Lakes Community Hospital/North Campus]	12-03-2011	5.00	5.00
Williams, Marva	Pet Therapy Program [Great Lakes Community Hospital/North Campus]	12-03-2011	4.00	4.00
Zanbrano, Alphonso	Room Visitor [Great Lakes Community Hospital/South Campus]	12-03-2011	3.00	3.00

Printed 12-05-2011 10:17 am

Page 1

A-Z

## Related help

[Help Topic 1120 \[pg:0426\]](#) - Batch Report



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## Name, Address, and Phone List (stock)

Help topic 8002

Added or revised 12-21-2011

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A simple list of volunteers with their addresses and phone numbers.

Volunteer List Sample Organization Name		
Volunteer	Address	Phone numbers
Abbott, Chris	821 Campbell Dr. Anderson, IN 45259	(513) 555-6743 (Home) (513) 555-7286 (Work) (513) 555-0322 (Cell)
Acker, Claire	905 Cochrane Dr. Apt 122 Anderson, IN 45259	(513) 555-6752 (Home) (513) 555-7286 (Work) (513) 555-5560 (Cell) (513) 555-7621 (Pager)
Agans, Mavis	1343 Forester Ave. Apt.8 Anderson, IN 45259	(513) 555-6948 (Home)
Albers, Rita	583 Short Rd. Highland Village, IN 45259	(513) 555-6994 (Home) (513) 555-6004 (Cell)
Alderman, Zuzana	336 King Court Oldport, IN 41555	(751) 555-1412 (Home) (751) 555-0313 (Cell) (751) 555-1212 (Pager)
Ali, Brian	1486 Peters Dr. Oldport, IN 41555	(751) 555-1235 (Home) (751) 555-2346 (Work)
Allen, Kathleen	641 Hansen St. Apt B Anderson, OH 45259	(513) 555-6886 (Home) (513) 555-7563 (Work) (513) 555-6004 (Cell)
Amundson, Alan	341 Talbot Dr. Highland Village, IN 45259	(513) 555-7222 (Work) (751) 555-0313 (Cell)
Anderson, Carmon	191 Wait Dr. Bedford Falls, IN 45259	(513) 555-6728 (Home) (513) 555-0322 (Cell) (512) 555-6728 (Fax)
Anderson, Jean	2256 Buchanan St. Oldport, IN 41555	(751) 555-1300 (Home) (751) 555-2367 (Work)
Anderson, Jenny	470 Adams St. Oldport, IN 41555	(751) 555-1309 (Home) (751) 555-2367 (Work) (751) 555-0313 (Cell)
Anderson, Kate	1206 Walker St. Oldport, IN 41555	(751) 555-0313 (Cell)
Anderson, Kate	373 Preston St. Anderson, OH 45259	(513) 555-6884 (Home) (513) 555-7563 (Work) (513) 555-1010 (Other)
Anderson, Kelly	2361 Khan St. Oldport, IN 41555	(751) 555-1328 (Home) (751) 555-2367 (Work) (751) 555-0313 (Cell)

Printed 01-21-2004 8:35 am Page 1 A-Ande

### Related help

# Flags and Types List (stock)

Help topic 8003

Added or revised 12-21-2011

A list of volunteers and their Flags and Type. Flags and Type information appears on the Core tab in the volunteer record.

Flags & Types Sample Organization Name			
Volunteer	Status	Type	Flags
Abbott, Chris	Inactive	Adult	Auxiliary Blue team Board of directors Green team Hanover house Heart to heart Life member
Acker, Claire	Active	Adult	Auxiliary Board of directors Day of caring Green team Life member Red team Special projects
Agans, Mavis	Active	Adult	Donor Green team
Albers, Rita	Active	Junior	Auxiliary Day of caring Green team Hanover house Heart to heart Red team
Alderman, Zuzana	Active	Junior	Blue team Board of directors Day of caring Donor Heart to heart Life member Special projects
Ali, Brian	Active	Adult	Donor Life member
Allen, Kathleen	Applicant	Adult	Auxiliary Heart to heart Life member
Amundson, Alan	Active	Junior	Auxiliary Blue team Donor Heart to heart Life member Special projects
Anderson, Carmon	Prospect	Adult	Blue team Hanover house Heart to heart

Printed 01-21-2004 8:56 am Page 1 A-Anderson, C

## Related help

# Volunteer Assignment List (stock)

Help topic 8004

Added or revised 12-21-2011

A list of volunteers and their volunteer assignments.

Volunteer Assignment List					
Sample Organization Name					
Volunteer	Status	Assignment Assignment	Assignment Role	Assignment From	Assignment To
Abbott, Chris	Inactive	Adoption Counselor [Northside/Adoption] Adoption Promotion [Southside/Adoption]	Assigned Trainee	01-18-2002 01-03-2004	
Acker, Claire	Active				
Agans, Mavis	Active	Tour Guide [Northside/Direct Services] Tour Guide [Northside/Direct Services] Usher [Northside/Support Services]	Assigned Substitute Former	01-01-1990 02-15-2001 07-12-1992	12-31-1988
Albers, Rita	Active	Information Desk [Northside/Support Services]	Assigned	03-09-2003	
Alderman, Zuzana	Active	Information Desk [Northside/Support Services] Tutor [Northside/Direct Services] Usher [Northside/Support Services]	Assigned Assigned Assigned	06-01-1997 08-23-2002 08-12-2002	
Ali, Brian	Active	Vehicle maintenance [Northside/Support Services]	Assigned	03-12-2002	
Allen, Kathleen	Applicant	Vehicle maintenance [Northside/Support Services] Vehicle prep aide [Northside/Support Services]	Assigned Former	12-31-2000 12-06-1994	12-31-2000
Amundson, Alan	Active	Adoption Counselor [Northside/Adoption]	Trainee	01-02-2004	
Anderson, Carmon	Prospect	Clerical [Northside/Support Services] Information Desk [Northside/Support Services] Tour Guide [Northside/Direct Services] Usher [Northside/Support Services]	Former Substitute Assigned Assigned	07-15-1996 01-01-2002 05-15-2002 05-13-1999	12-06-1998
Anderson, Jean	Applicant	Clerical [Northside/Support Services]	Assigned	06-12-2002	
Anderson, Jenny	Active				
Anderson, Kate	Inactive	Tutor [Northside/Direct Services]	Assigned	06-12-2002	
Anderson, Kate	Active				
Anderson, Kelly	Active				
Andrews, Kane	Active	Tour Guide [Northside/Direct Services] Usher [Northside/Support Services]	Assigned Assigned	06-01-1999 04-18-2002	
Armstrong, Carol	Active	Adoption Promotion [Northside/Adoption] Adoption Promotion [Southside/Adoption]	Substitute Assigned	06-19-2002 06-19-2002	
Armstrong, Lisa	Applicant	Information Desk [Northside/Support Services] Information Desk [Northside/Support Services] Tour Guide [Northside/Direct Services]	Assigned Former Trainee	01-18-2004 07-01-1998 12-01-2003	07-01-2002
Arnold, Michelle	Active	Vehicle maintenance [Northside/Support Services]	Assigned	05-15-2002	
Austin, Molly	Active	Vehicle prep aide [Northside/Support Services]	Assigned	06-16-1999	
Ayers, Mary	Applicant	Information Desk [Northside/Support Services]	Former	07-13-2002	12-31-2003
Badham, Jan	Active	Tour Guide [Northside/Direct Services] Usher [Northside/Support Services]	Assigned Assigned	05-15-2000 06-12-2000	
Baker, Angel	Active	Information Desk [Northside/Support Services]	Assigned	06-12-2000	
Baker, Sarai	Applicant	Vehicle maintenance [Northside/Support Services] Vehicle prep aide [Northside/Support Services]	Assigned Assigned	05-15-1999 07-12-2003	
Barker, Aaron	Prospect	Clerical [Northside/Support Services] Information Desk [Northside/Support Services]	Assigned Trainee	08-12-2002 01-02-2004	

Printed 01-21-2004 9:54 am

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## Related help

# Volunteer Message Preferences (stock)

Help topic 8005

Added or revised 08-15-2014

This report shows you how each volunteer has tailored their [message preferences \[pg:0381\]](#). It includes a list of volunteers followed by their current message preferences. The message preferences will have either *(text)* or *(email)* behind them to indicate if the volunteer prefers to receive that [type of message \[pg:1321\]](#) by email or [text \[pg:0352\]](#). If the volunteer has opted not to receive a certain type of message, that type of message will not be listed by their name. Volunteer message preferences appear on the Profile tab in the volunteer record.

 <span style="float: right;"> <b>Volunteer Message Preferences</b>  <small>Your Agency Name</small> </span>		
Volunteer	Status	Message Preferences
Armstrong, Mary	Applicant	Checklist reminders (email) Electronic newsletters (email) Information Request (email) Recruitment appeals (email) Schedule reminders (email) Volunteer News (email)
Bacous, Lydia	Active	Checklist reminders (text) Electronic newsletters (email) Information Request (text) Recruitment appeals (text) Schedule reminders (text) Volunteer News (email)
Bailey, Victor	Applicant	Checklist reminders (email) Electronic newsletters (email) Information Request (email) Recruitment appeals (email) Schedule reminders (email) Volunteer News (email)
Bargas, Jessica	Applicant	Checklist reminders (email) Electronic newsletters (email) Information Request (email) Recruitment appeals (email) Schedule reminders (email) Volunteer News (email)
Barker, Geraldine	Active	Checklist reminders (text) Electronic newsletters (email) Information Request (text) Volunteer News (email)
Barnes, Merry	Active	Checklist reminders (text) Electronic newsletters (text) Information Request (text) Recruitment appeals (text) Schedule reminders (text) Volunteer News (text)
Barra, Cathy	Active	Checklist reminders (text) Electronic newsletters (email) Information Request (text) Recruitment appeals (text) Schedule reminders (text) Volunteer News (email)
Becker, Anna	Active	Checklist reminders (email) Electronic newsletters (email) Information Request (email)

Printed 08-15-2014 10:13 am Page 1 A-Bec

# Volunteer Service List (stock)

Help topic 8006

Added or revised 12-21-2011

Lists volunteers, and their volunteer service records (hours). You can choose if you want all service records, or only those for a certain month, year, or period of years when you print the report. The report includes the assignment where the service was performed, the date (or date range), and the amount of service performed. A sub-total prints for each volunteer.

Volunteer Service List				
Sample Organization Name				
Volunteer	Service Assignment	Service From date	Service To date	Service Hours
Abbott, Chris	Adoption Counselor [Northside\Adoption]	01-18-2003	01-18-2003	5:00
	Adoption Counselor [Northside\Adoption]	02-16-2003	02-16-2003	6:00
	Adoption Counselor [Northside\Adoption]	03-15-2003	03-15-2003	6:30
	Adoption Counselor [Northside\Adoption]	05-14-2003	05-14-2003	5:15
	Adoption Counselor [Northside\Adoption]	07-12-2003	07-12-2003	6:15
	Adoption Counselor [Northside\Adoption]	08-13-2003	08-13-2003	6:00
				35:00
Acker, Claire				
Agans, Mavis	Tour Guide [Northside\Direct Services]	02-10-2003	02-10-2003	4:00
	Tour Guide [Northside\Direct Services]	03-08-2003	03-08-2003	2:00
	Usher [Northside\Support Services]	03-18-2003	03-18-2003	2:30
	Tour Guide [Northside\Direct Services]	04-12-2003	04-12-2003	4:00
	Tour Guide [Northside\Direct Services]	05-14-2003	05-14-2003	2:00
	Usher [Northside\Support Services]	05-16-2003	05-16-2003	2:30
	Tour Guide [Northside\Direct Services]	06-06-2003	06-06-2003	2:00
	Tour Guide [Northside\Direct Services]	06-22-2003	06-22-2003	4:00
	Tour Guide [Northside\Direct Services]	08-10-2003	08-10-2003	2:00
	Tour Guide [Northside\Direct Services]	12-10-2003	12-10-2003	4:00
				29:00
Albers, Rita	Information Desk [Northside\Support Services]	01-20-2003	01-20-2003	4:00
	Information Desk [Northside\Support Services]	02-22-2003	02-22-2003	4:15
	Information Desk [Northside\Support Services]	03-21-2003	03-21-2003	4:00
	Information Desk [Northside\Support Services]	04-19-2003	04-19-2003	3:48
	Usher [Northside\Support Services]	04-01-2003	04-01-2003	2:30
	Information Desk [Northside\Support Services]	05-20-2003	05-20-2003	4:00
	Tutor [Northside\Direct Services]	05-10-2003	05-10-2003	3:00
	Information Desk [Northside\Support Services]	06-20-2003	06-20-2003	4:30
	Information Desk [Northside\Support Services]	06-19-2003	06-19-2003	2:18
	Information Desk [Northside\Support Services]	07-20-2003	07-20-2003	5:00
	Information Desk [Northside\Support Services]	09-20-2003	09-20-2003	3:00
	Information Desk [Northside\Support Services]	10-22-2003	10-22-2003	4:00
				44:21
Alderman, Zuzana	Information Desk [Northside\Support Services]	01-15-2003	01-15-2003	4:00
	Tour Guide [Northside\Direct Services]	01-28-2003	01-28-2003	2:00
	Information Desk [Northside\Support Services]	02-14-2003	02-14-2003	4:00
	Tutor [Northside\Direct Services]	02-18-2003	02-18-2003	4:00
	Information Desk [Northside\Support Services]	03-14-2003	03-14-2003	4:30
	Tutor [Northside\Direct Services]	03-30-2003	03-30-2003	4:30
	Information Desk [Northside\Support Services]	05-16-2003	05-16-2003	2:30
	Tutor [Northside\Direct Services]	05-28-2003	05-28-2003	6:00
				31:30
Ali, Brian				
Allen, Kathleen	Vehicle maintenance [Northside\Support Services]	01-06-2003	01-06-2003	1:30
	Vehicle prep aide [Northside\Support Services]	01-12-2003	01-12-2003	3:00
	Vehicle maintenance [Northside\Support Services]	02-06-2003	02-06-2003	2:45
	Vehicle prep aide [Northside\Support Services]	03-15-2003	03-15-2003	6:00
	Vehicle maintenance [Northside\Support Services]	04-06-2003	04-06-2003	4:15
	Vehicle prep aide [Northside\Support Services]	05-26-2003	05-26-2003	2:45
	Vehicle maintenance [Northside\Support Services]	06-07-2003	06-07-2003	2:30
	Vehicle prep aide [Northside\Support Services]	06-12-2003	06-12-2003	5:30
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## Related help

# Volunteer Schedule List (stock)

Help topic 8007

Added or revised 01-03-2012

A [stock \[pg:0595\]](#) report for printing lists of volunteers, and their schedules. This report includes this information from the volunteer's schedule: date scheduled, assignment scheduled, start and stop times, if they are a Regular volunteer, and any notes attached to a schedule entry. You can choose the range of dates for which volunteer schedule entries appear.

This report shows the volunteer's schedules in a list format. If you want the schedules in a calendar format, you can use a Schedule report. [Help topic 8255 \[pg:0547\]](#) has more information on these reports.

Volunteer Schedule List						
Sample Organization Name						
Volunteer	Schedule Date	Schedule Assignment	Schedule From	Schedule To	Schedule Regular	Schedule Note
Abbott, Chris	02-02-2004	Information Desk [Northside\Support Services]	8:00 a	12:00 p	Yes	
	02-04-2004	Information Desk [Northside\Support Services]	8:00 a	12:00 p	Yes	
	02-09-2004	Information Desk [Northside\Support Services]	8:00 a	12:00 p	Yes	
	02-11-2004	Information Desk [Northside\Support Services]	8:00 a	12:00 p	Yes	
	02-16-2004	Usher [Northside\Support Services]	8:30 p	8:00 p	No	
	02-16-2004	Information Desk [Northside\Support Services]	8:00 a	12:00 p	Yes	
	02-18-2004	Information Desk [Northside\Support Services]	8:00 a	12:00 p	Yes	
	02-23-2004	Information Desk [Northside\Support Services]	8:00 a	12:00 p	Yes	
02-26-2004	Information Desk [Northside\Support Services]	8:00 a	12:00 p	Yes		
Acker, Claire	02-03-2004	Usher [Northside\Support Services]	8:00 p	8:00 p	Yes	
	02-06-2004	Usher [Northside\Support Services]	8:00 p	8:00 p	Yes	
	02-10-2004	Usher [Northside\Support Services]	8:00 p	8:00 p	Yes	
	02-12-2004	Usher [Northside\Support Services]	8:00 p	8:00 p	Yes	
	02-17-2004	Usher [Northside\Support Services]	8:00 p	8:00 p	Yes	
	02-19-2004	Usher [Northside\Support Services]	8:00 p	8:00 p	Yes	
	02-24-2004	Usher [Northside\Support Services]	8:00 p	8:00 p	Yes	
	02-26-2004	Usher [Northside\Support Services]	8:00 p	8:00 p	Yes	
Agans, Mavis	02-03-2004	Information Desk [Northside\Support Services]	12:00 p	4:00 p	Yes	
	02-05-2004	Information Desk [Northside\Support Services]	12:00 p	4:00 p	Yes	
	02-07-2004	Information Desk [Northside\Support Services]	12:00 p	4:00 p	Yes	
	02-10-2004	Information Desk [Northside\Support Services]	12:00 p	4:00 p	Yes	
	02-12-2004	Information Desk [Northside\Support Services]	12:00 p	4:00 p	Yes	
	02-14-2004	Information Desk [Northside\Support Services]	12:00 p	4:00 p	Yes	
	02-17-2004	Information Desk [Northside\Support Services]	12:00 p	4:00 p	Yes	
	02-19-2004	Information Desk [Northside\Support Services]	12:00 p	4:00 p	Yes	
Albers, Rita	02-07-2004	Tour Guide [Northside\Direct Services]	9:00 a	12:00 p	Yes	
	02-07-2004	Tour Guide [Northside\Direct Services]	9:00 a	12:00 p	Yes	
	02-09-2004	Tour Guide [Northside\Direct Services]	9:00 a	12:00 p	Yes	
	02-14-2004	Tour Guide [Northside\Direct Services]	9:00 a	12:00 p	Yes	
	02-16-2004	Tour Guide [Northside\Direct Services]	9:00 a	12:00 p	Yes	
	02-21-2004	Tour Guide [Northside\Direct Services]	9:00 a	12:00 p	Yes	
	02-23-2004	Tour Guide [Northside\Direct Services]	9:00 a	12:00 p	Yes	
	02-26-2004	Tour Guide [Northside\Direct Services]	9:00 a	12:00 p	Yes	
Alderman, Zuzana	02-01-2004	Information Desk [Northside\Support Services]	12:00 p	4:00 p	Yes	
	02-03-2004	Information Desk [Northside\Support Services]	12:00 p	4:00 p	Yes	
	02-04-2004	Tour Guide [Northside\Direct Services]	12:00 p	3:00 p	Yes	
	02-05-2004	Tour Guide [Northside\Direct Services]	12:00 p	3:00 p	Yes	
	02-08-2004	Information Desk [Northside\Support Services]	12:00 p	4:00 p	Yes	
	02-10-2004	Information Desk [Northside\Support Services]	12:00 p	4:00 p	Yes	
	02-11-2004	Tour Guide [Northside\Direct Services]	12:00 p	3:00 p	Yes	
	02-15-2004	Information Desk [Northside\Support Services]	12:00 p	4:00 p	Yes	
	02-17-2004	Information Desk [Northside\Support Services]	12:00 p	4:00 p	Yes	
	02-18-2004	Tour Guide [Northside\Direct Services]	12:00 p	3:00 p	Yes	
	02-19-2004	Tour Guide [Northside\Direct Services]	12:00 p	3:00 p	Yes	
	02-22-2004	Information Desk [Northside\Support Services]	12:00 p	4:00 p	Yes	
	02-24-2004	Information Desk [Northside\Support Services]	12:00 p	4:00 p	Yes	
	02-26-2004	Tour Guide [Northside\Direct Services]	12:00 p	3:00 p	Yes	
02-26-2004	Information Desk [Northside\Support Services]	12:00 p	4:00 p	Yes		
Ali, Brian	02-07-2004	Tour Guide [Northside\Direct Services]	12:00 p	3:00 p	Yes	
	02-14-2004	Tour Guide [Northside\Direct Services]	12:00 p	3:00 p	Yes	
	02-21-2004	Tour Guide [Northside\Direct Services]	12:00 p	3:00 p	Yes	
	02-26-2004	Tour Guide [Northside\Direct Services]	12:00 p	3:00 p	Yes	
Allen, Kathleen						
Amundson, Alan						
Anderson, Camron						
Anderson, Jean						
Anderson, Jenny						
Anderson, Kate	02-02-2004	Vehicle maintenance [Northside\Support Services]	8:00 a	10:00 a	Yes	
	02-04-2004	Vehicle maintenance [Northside\Support Services]	8:00 a	10:00 a	Yes	
	02-06-2004	Vehicle maintenance [Northside\Support Services]	8:00 a	10:00 a	Yes	

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## Related help

# Regular Schedule List Report (stock)

Help topic 8008

Added or revised 01-05-2012

This [stock \[pg:0595\]](#) volunteer list report format prints lists of volunteers and their **regular** schedules. The report includes the volunteer name and the following information about their regular schedules: the Assignment they are scheduled for, their regular From and To times, and the days of the week they serve regularly.

This report shows the volunteer's schedules in a list format. If you want the schedules in a calendar format, you can use a Schedule report. [Help topic 8255 \[pg:0547\]](#) has more information on these reports.

Regular Schedule List Report				
Sample Organization Name				
Volunteer	Regular Schedule Assignment	Regular Schedule From	Regular Schedule To	Regular Schedule Days
Barclay, Andrea	Patient Advocate	10:00 a	12:00 p	Mo (every) Tu (every) We (every) Th (every) Fr (every)
Bucholz, Tim	Emergency Assistant	7:00 a	12:00 p	Th (every)
Coolidge, Sarahlyn	Office Work	11:00 a	4:30 p	Mo (Alternate )
Dalman, Malinda	Emergency Assistant	7:00 a	12:00 p	Mo (every) Tu (every) We (every) Th (every) Fr (every)
Fitzgerald, Larry				
Gillette, Sara Paige				
Good, Michelle	Parking Lot Watch	7:00 p	6:00 a	We (Alternate )
Jones, Lamont				
Joplin, Jessica	Emergency Assistant	7:00 a	12:00 p	Mo (every) Tu (every) We (every) Th (every) Fr (every)
Lawrence, Virginia	Office Work	11:00 a	4:30 p	Mo (every) Tu (every) We (every) Th (every) Fr (every)
	Pet Therapy Program	7:00 p	9:00 p	We (every)
Lynch, Wilma	Set up Saturday Morning	6:00 a	9:00 a	Su (every) We (every)
	Surgery Waiting Room Monitor	7:00 a	12:30 p	Sa (every) Tu (every) Th (every)
Mandrake, Larry	Emergency Assistant	1:00 p	3:00 p	Tu (every) Th (every)
McCorky, Sara Ann	Parking Lot Clean-up	10:00 p	11:00 p	Su (every) Mo (every) Tu (every) We (every)

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To create a new Regular Schedule List stock report:

1. Choose Print from the menu.
2. Click on Volunteer list.
3. Click on Regular schedule list report (stock).

4. Click **Print it** to print the stock report now, or **Clone it** to create a new report based on this stock report.
5. Customize the report's tabs, and click the **Start printing** button on the Include page.
6. Retrieve the report from your Volgistics Mailbox.

**Related help**



# Volunteer Checklist Report (stock)

Help topic 8009

Added or revised 12-21-2011

This [stock \[pg:0595\]](#) report lists volunteers, their Status, Type, and their volunteer checklist. The report lists each item that appears on each volunteer's checklist, and if it has been completed or not. For checklist items that will expire, the report lists the expiration date.

Volunteer Checklist Report			
Sample Organization Name			
Volunteer	Status	Type	Checklist
Abbott, Chris	Active	Adult	Confidentiality statement (complete) CPR (due again 01-20-2005) Dues - 2004 (pending) Health screening (due again 01-20-2005) Orientation (complete)
Acker, Claire	Active	Adult	Confidentiality statement (complete) CPR (pending) Dues - 2004 (pending) Health screening (due again 02-12-2004) Orientation (complete)
Agans, Mavis	Active	Adult	Confidentiality statement (complete) CPR (due again 02-29-2004) Health screening (pending) Orientation (complete)
Albers, Rita	Active	Junior	Confidentiality statement (complete) CPR (pending) Dues - 2004 (complete) Orientation (complete)
Alderman, Zuzana	Active	Junior	Confidentiality statement (complete) CPR (due again 03-22-2004) Orientation (complete)
Ali, Brian	Active	Adult	Confidentiality statement (complete) CPR (pending) Health screening (due again 12-14-2004) Orientation (complete)
Allen, Kathleen	Applicant	Adult	Confidentiality statement (complete) Dues - 2004 (pending) Health screening (pending) Orientation (pending)
Amundson, Alan	Active	Junior	Confidentiality statement (pending) CPR (pending) Dues - 2004 (pending) Orientation (pending)
Anderson, Carmon	Prospect	Adult	
Anderson, Jean	Applicant	Adult	Confidentiality statement (pending) Dues - 2004 (pending) Health screening (pending)

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## Related help

# Volunteer Date History (stock)

Help topic 8010

Added or revised 12-21-2011

This [stock \[pg:0595\]](#) report lists volunteers, followed by the information that appears in the Dates box on the History tab. You can choose the kinds of Date records you want to appear on the report. For example, you can include just Status dates, Checklist dates, Course dates, Mail dates, or Award dates.

Volunteer Date History					
Sample Organization Name					
Volunteer	Dates Kind	Dates Event	Dates Date	Dates Expires	Dates Notation
Abbott, Chris	Status	Active	05-15-1993		
	Checklist	Confidentiality statement	03-15-2002		
	Checklist	CPR	12-21-2003	01-20-2005	
	Checklist	Health screening	01-21-2004	01-20-2005	
Acker, Claire	Checklist	Orientation	04-14-2000		
	Status	Active	01-20-2002		
	Checklist	Confidentiality statement	01-21-2002		
	Checklist	Health screening	02-12-2002	02-12-2003	
Agans, Mavis	Checklist	Health screening	02-10-2003	02-12-2004	
	Checklist	Orientation	03-16-2002		
	Status	Active	02-08-1998		
	Award	1 Year	01-20-2004		
Albers, Rita	Checklist	Confidentiality statement	02-12-1998		
	Checklist	CPR	03-15-2000	03-15-2001	
	Checklist	CPR	03-01-2003	02-29-2004	
	Checklist	Orientation	02-08-1998		
Alderman, Zuzana	Status	Active	07-28-2000		
	Award	1 Year	01-20-2004		
	Checklist	Confidentiality statement	07-28-2000		
	Checklist	Orientation	07-28-0200		
Ali, Brian	Checklist	Dues - 2004	01-04-2004		
	Status	Active	03-02-2000		
	Award	1 Year	01-20-2004		
	Checklist	Confidentiality statement	03-03-0200	03-22-2004	
Allen, Kathleen	Checklist	CPR	03-23-2003		
	Checklist	Orientation	03-12-2000		
	Status	Active	01-18-2002		
	Award	1 Year	01-20-2004		
Amundson, Alan	Checklist	Confidentiality statement	01-18-2002		
	Checklist	Orientation	03-15-2002		
	Checklist	Health screening	12-15-2003	12-14-2004	
	Status	Applicant	01-15-1999		
Anderson, Carmon	Checklist	Confidentiality statement	01-17-1999		
	Checklist	Health screening	01-17-1999	01-17-2000	
	Checklist	Health screening	02-01-2003		
	Status	Active	10-10-1997		
Anderson, Jean	Award	1 Year	01-20-2004		
	Status	Prospect	03-18-1998		
Anderson, Jenny	Status	Applicant	10-07-2000		
	Status	Active	09-06-1999		
Anderson, Jenny	Award	1 Year	01-20-2004		

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## Related help

# Volunteer Contacts List (stock)

Help topic 8011

Added or revised 12-21-2011

This [stock \[pg:0595\]](#) report lists volunteers, followed by their list of contacts from the Contacts tab. Contact information includes the kind of contact, their relationship to the volunteer, the contacts name, their complete address, and their phone numbers.

Volunteer Contacts List					
Sample Organization Name					
Volunteer	Contact Kind	Contact Relationship	Contact Name	Contact Address	Contact Phone numbers
Abbott, Chris	Emergency Contact	Spouse	Abbott, Larry	821 Campbell Dr. Anderson, IN 45259	(123) 555-1234 (Home) (123) 555-1222 (Cell)
Acker, Claire	Emergency Contact	Father	Bailey, George	Bedford Falls, OH	(123) 123-1234 (Home) (123) 123-1222 (Cell)
	Employer			Anderson Rentals 1516 Main Street Bedford Falls, IN 48504	(513) 555-2000 (Work)
Agans, Mavis	Emergency Contact	Spouse	Agans, George	1343 Forester Ave. Anderson, IN 45245	(513) 555-1234 (Home) (513) 555-8021 (Cell)
	Minister		Clark, Howard		(513) 555-1000 (Work)
Albers, Rita	Emergency Contact	Co-worker	Benson, Larvance	320 Sycamore St. Apt 2 Bedford Falls, IN 45904	(513) 555-1298 (Home) 555-7272 (Cell)
	Employer	Supervisor	Larson, Jack	Mayflower & Associates 45 Main Street Bedford Falls, IN 45904	(513) 555-2929 (Work) (513) 555-2930 (Fax)
Alderman, Zuzana					
Ali, Brian	Emergency Contact	Father	Ali, George	7800 Clarkson Ave Apt 16 Bedford Falls, IN 48504	(555) 555-9898 (Home) (513) 555-2899 (Work)
	Reference	Neighbor	Jacobson, Mathew	5959 Elm Street Bedford Falls, IN 49062	(513) 555-1234 (Home)
Allen, Kathleen	Emergency Contact	Spouse	Allen, Juan	5858 East 1st Street Bedford Falls, IN 48504	(513) 555-1255 (Home) (513) 555-2020 (Work)
	Reference		Fredricks, Mary		(513) 555-9182 (Work)

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## Related help

# Volunteer Award List (stock)

Help topic 8012

Added or revised 12-21-2011

A [stock \[pg:0595\]](#) report that lists volunteers and the awards they've received or are ready to receive. Following each volunteer's name is a list of the awards they are ready to receive (based on your Volgistics awards setup and the volunteer's current service), and a list of any awards they have already received and the award date. A useful report when you are preparing for volunteer recognition events.

Volunteer Award List			
Sample Organization Name			
Volunteer	Checklist	Dates Event	Dates Date
Abbott, Chris	10 Year (pending) 500 Hours (pending)	100 Hours	03-15-2002
Acker, Claire	1 Year (pending)	100 Hours	03-15-2002
Agans, Mavis	5 Year (pending) 500 Hours (pending)	1 Year 100 Hours	01-20-2004 03-15-2002
Albers, Rita		1 Year	01-20-2004
Alderman, Zuzana		1 Year 100 Hours	01-20-2004 03-15-2002
Ali, Brian	100 Hours (pending) 500 Hours (pending)	1 Year	01-20-2004
Allen, Kathleen			
Amundson, Alan	5 Year (pending)	1 Year 100 Hours	01-20-2004 03-15-2002
Anderson, Carmon		100 Hours	03-15-2002
Anderson, Jean		100 Hours	03-15-2002
Anderson, Jenny		1 Year	01-20-2004
Anderson, Kate			
Anderson, Kate		1 Year	01-20-2004
Anderson, Kelly	5 Year (pending)	1 Year	01-20-2004
Andrews, Kane	5 Year (pending)	1 Year	01-20-2004
Armstrong, Carol			
Armstrong, Lisa			
Arnold, Michelle		1 Year	01-20-2004
Austin, Molly		1 Year	01-20-2004
Ayers, Mary			
Badham, Jan	500 Hours (pending)	1 Year 100 Hours	01-20-2004 03-15-2002
Baker, Angel	5 Year (pending)	1 Year	01-20-2004
Baker, Sarai			

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## Related help

# Volunteer Service Details (stock)

Help topic 8013

Added or revised 12-21-2011

Use this [stock \[pg:0595\]](#) report to list volunteers and their hours of service. The report lists the volunteer name followed by a list of their individual service entries for the month(s) you choose. The report lists volunteers alphabetically. For each service entry the report lists the From date, To date, Assignment, and hours served.

The total number of hours reported for each volunteer prints as a subtotal, and a grand total appears at the end of the report.

You can print this report for tagged volunteers, or for volunteers with any Flag, Type, Status, or Assignment you specify. You can print this report for any single month, or for any period of months (e.g. January 2005 through December 2005).

If you do not need a detailed service report such as this consider using the 'Service summary' report instead.

Volunteer Service Details				
March 2004				
Volunteer	Service From Date	Service To Date	Service Assignment	Hours
Applebe, Tom	03-03-2004	03-03-2004	Client Advocate	3:00
	03-06-2004	03-06-2004	Info Desk	4:00
	03-10-2004	03-10-2004	Info Desk	2:30
	03-10-2004	03-10-2004	Special Events	2:30
	03-05-2004	03-05-2004	Info Desk	1:27
	03-18-2004	03-18-2004	Phones	4:27
				<b>17:54</b>
Bailey, Harry	03-03-2004	03-03-2004	Phones	4:00
	03-06-2004	03-06-2004	Transporation Driver	3:00
	03-10-2004	03-10-2004	Special Events	2:00
	03-10-2004	03-10-2004	Special Events	2:30
	03-05-2004	03-05-2004	Info Desk	3:00
	03-18-2004	03-18-2004	Info Desk	2:00
				<b>16:30</b>
Bailey, Mary	03-03-2004	03-03-2004	Information services	3:15
	03-10-2004	03-10-2004	Special Events	2:00
	03-10-2004	03-10-2004	Special Events	2:30
	03-05-2004	03-05-2004	Special Events	2:00
	03-18-2004	03-18-2004	Transporation Driver	6:00
Baillard, Elizabeth	03-03-2004	03-03-2004	Speakers Bureau	2:30
	03-06-2004	03-06-2004	Info Desk	3:30
	03-10-2004	03-10-2004	Information services	2:30
	03-10-2004	03-10-2004	(None)	2:30
	03-05-2004	03-05-2004	Info Desk	3:30
	03-18-2004	03-18-2004	Information services	3:00
				<b>17:30</b>
Bennegin, Keshia	03-18-2004	03-18-2004	Info Desk	4:00
	03-27-2004	03-27-2004	Info Desk	3:00
	03-31-2004	03-31-2004	Info Desk	2:15
				<b>9:15</b>
Calbert, Bert				0
Clark, Janice	03-03-2004	03-03-2004	Phones	4:15
	03-06-2004	03-06-2004	Speakers Bureau	3:30
	03-10-2004	03-10-2004	Speakers Bureau	2:00
	03-10-2004	03-10-2004	Special Events	2:30
	03-05-2004	03-05-2004	Phones	6:00
	03-18-2004	03-18-2004	Phones	3:45
				<b>22:00</b>
Clark, Kevin	03-18-2004	03-18-2004	Info Desk	3:30
	03-27-2004	03-27-2004	Transporation Driver	3:00
	03-31-2004	03-31-2004	Special Events	2:30
				<b>9:00</b>

Printed 04-27-2004 7:12 pm

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**Related help**

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## Assignment Service Details (stock)

Help topic 8014

Added or revised 12-21-2011

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This [stock \[pg:0595\]](#) report lists the service entries for the month(s) you choose in order of the assignment in which the service was given. If you organize your assignments according to sites and places, assignments are sorted by site and place also.

The report lists sites, places, and assignments alphabetically. For each assignment, the report lists the volunteers who have service in that assignment during the month(s) you include. For each volunteer, the report lists each of the volunteer's service entries in that assignment, including the service From date, To date, and hours served.

The total number of hours reported for each volunteer, assignment, place, and site prints as a subtotal, and a grand total appears at the end of the report.

You can print this report for tagged volunteers, or for volunteers with any Flag, Type, Status, or Assignment you specify. You can print this report for any single month, or for any span of months (e.g. January 2005 through December 2005).

If you do not need a detailed service report such as this consider using the 'Service summary' report instead.

## Assignment Service Details

March 2004

Site	Place	Assignment	Volunteer	Service From Date	Service To Date	Hours		
Sample Organization Name	Administration	Info Desk	Applebe, Tom	03-06-2004	03-06-2004	4:00		
				03-10-2004	03-10-2004	2:30		
				03-05-2004	03-05-2004	1:27		
								7:57
			Bailey, Harry	03-05-2004	03-05-2004	3:00		
				03-16-2004	03-18-2004	2:00		
						5:00		
			Ballard, Elizabeth	03-06-2004	03-06-2004	3:30		
				03-05-2004	03-05-2004	3:30		
						7:00		
			Bennegh, Keshia	03-18-2004	03-18-2004	4:00		
				03-27-2004	03-27-2004	3:00		
				03-31-2004	03-31-2004	2:15		
						9:15		
			Clark, Kevin	03-18-2004	03-18-2004	3:30		
					3:30			
		Dakin, Ruth	03-05-2004	03-05-2004	7:30			
			03-16-2004	03-18-2004	7:12			
					14:42			
		Decker, Elizabeth	03-18-2004	03-18-2004	4:24			
			03-27-2004	03-27-2004	3:00			
					7:24			
		Flynn, Violet	03-06-2004	03-06-2004	3:30			
					3:30			
		Henderson, Mary	03-06-2004	03-06-2004	2:00			
			03-05-2004	03-05-2004	2:00			
					4:00			
Howard, Jim	03-10-2004	03-10-2004	2:30					
			2:30					
			64:48					
		Information services						
		Bailey, Mary	03-03-2004	03-03-2004	3:15			
				3:15				
		Ballard, Elizabeth	03-10-2004	03-10-2004	2:30			
			03-16-2004	03-18-2004	3:00			
					5:30			
		Edgerton, Giuseppina	03-18-2004	03-18-2004	2:00			
					2:00			
		Garola, Jackie	03-18-2004	03-18-2004	2:00			
			03-27-2004	03-27-2004	3:00			
					5:00			
					15:45			
		Records						
		Green, Harriet	03-03-2004	03-03-2004	4:30			
					4:30			
		Howard, Ernie	03-06-2004	03-06-2004	4:00			
			03-05-2004	03-05-2004	6:00			
			03-16-2004	03-18-2004	2:00			

Printed 04-27-2004 6:59 pm

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**Related help**



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## Type Service Details (stock)

Help topic 8015

Added or revised 12-21-2011

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This [stock \[pg:0595\]](#) report lists volunteers and their service entries for the month(s) you choose in order of volunteer Type. The Type field, located in the Name box on the Core tab for each volunteer, is often used to classify volunteers according to major divisions in volunteer programs, such as 'adult,' 'junior,' 'regular,' 'student,' and so forth. This report shows service details according to these divisions.

The report lists each Type alphabetically, followed by the list of volunteers in that Type and their service entries for the month(s) selected. For each service entry the report lists the service From date, To date, Assignment, and hours served.

The total number of hours reported for each volunteer and Type prints as a subtotal, and a grand total appears at the end of the report.

You can print this report for tagged volunteers, or for volunteers with any Flag, Type, Status, or Assignment you specify. You can print this report for any single month, or for any span of months (e.g. January 2005 through December 2005).

If you do not need a detailed service report such as this consider using the 'Service summary' report instead.

## Type Service Details

March 2004

Type	Volunteer	Service From Date	Service To Date	Service Assignment	Hours
Adult	Tom Applebe	03-03-2004	03-03-2004	Client Advocate	3:00
		03-06-2004	03-06-2004	Info Desk	4:00
		03-10-2004	03-10-2004	Info Desk	2:30
		03-10-2004	03-10-2004	Special Events	2:30
		03-05-2004	03-05-2004	Info Desk	1:27
		03-19-2004	03-18-2004	Phones	4:27
					<b>17:54</b>
	Harry Bailey	03-03-2004	03-03-2004	Phones	4:00
		03-06-2004	03-06-2004	Transporation Driver	3:00
		03-10-2004	03-10-2004	Special Events	2:00
		03-10-2004	03-10-2004	Special Events	2:30
		03-05-2004	03-05-2004	Info Desk	3:00
		03-19-2004	03-18-2004	Info Desk	2:00
					<b>16:30</b>
	Mary Bailey	03-03-2004	03-03-2004	Information services	3:15
		03-10-2004	03-10-2004	Special Events	2:00
		03-10-2004	03-10-2004	Special Events	2:30
		03-05-2004	03-05-2004	Special Events	2:00
		03-19-2004	03-18-2004	Transporation Driver	6:00
					<b>15:45</b>
	Elizabeth Ballard	03-03-2004	03-03-2004	Speakers Bureau	2:30
		03-06-2004	03-06-2004	Info Desk	3:30
		03-10-2004	03-10-2004	Information services	2:30
		03-10-2004	03-10-2004	(None)	2:30
		03-05-2004	03-05-2004	Info Desk	3:30
		03-19-2004	03-18-2004	Information services	3:00
					<b>17:30</b>
	Janice Clark	03-03-2004	03-03-2004	Phones	4:15
		03-06-2004	03-06-2004	Speakers Bureau	3:30
		03-10-2004	03-10-2004	Speakers Bureau	2:00
		03-10-2004	03-10-2004	Special Events	2:30
		03-05-2004	03-05-2004	Phones	6:00
		03-19-2004	03-18-2004	Phones	3:45
					<b>22:00</b>
	Ruth Dakin	03-03-2004	03-03-2004	Speakers Bureau	2:00
		03-10-2004	03-10-2004	(None)	2:30
		03-05-2004	03-05-2004	Info Desk	7:30
		03-19-2004	03-18-2004	Info Desk	7:12
				<b>19:12</b>	
	Giuseppina Edgerton	03-03-2004	03-03-2004	Transporation Driver	2:00
		03-06-2004	03-06-2004	Phones	6:00
		03-10-2004	03-10-2004	Phones	2:45
		03-10-2004	03-10-2004	Special Events	2:30
		03-05-2004	03-05-2004	Special Events	2:00

Printed 04-27-2004 7:10 pm

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### Related help

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## Place Service Details (stock)

Help topic 8016

Added or revised 12-21-2011

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This [stock \[pg:0595\]](#) report lists volunteers and their service entries for the month(s) you choose in order of Place and assignment. For each Place in your database, the report lists assignments alphabetically. Following each assignment is the list of volunteers who have service in that assignment for the month(s) selected, and their service entries for that assignment. For each service entry the report lists the service From date, To date, and hours served.

The report starts each Place on a new page. This is useful if you would like to distribute a report of the service details to the lead person (e.g. chairman, administrator, coordinator, director) for each Place.

The total number of hours reported for each volunteer, assignment, and Place prints as a subtotal.

You can print this report for tagged volunteers, or for volunteers with any Flag, Type, Status, or Assignment you specify. You can print this report for any single month, or for any span of months (e.g. January 2005 through December 2005).

If you do not need a detailed service report such as this consider using the 'Service summary' report instead.

## Service Details

March 2004

Site	Place	Volunteer	Service From Date	Service To Date	Service Assignment	Hours
Sample Organization Name	Volunteer Office	Applebe, Tom	03-10-2004	03-10-2004	Special Events	2:30
			03-18-2004	03-18-2004	Phones	4:27
		Bailey, Harry	03-03-2004	03-03-2004	Phones	4:00
			03-10-2004	03-10-2004	Special Events	2:00
			03-10-2004	03-10-2004	Special Events	2:30
		Bailey, Mary	03-10-2004	03-10-2004	Special Events	2:00
			03-10-2004	03-10-2004	Special Events	2:30
			03-05-2004	03-05-2004	Special Events	2:00
		Ballard, Elizabeth	03-03-2004	03-03-2004	Speakers Bureau	2:30
						2:30
		Clark, Janice	03-03-2004	03-03-2004	Phones	4:15
			03-06-2004	03-06-2004	Speakers Bureau	3:30
			03-10-2004	03-10-2004	Speakers Bureau	2:00
			03-10-2004	03-10-2004	Special Events	2:30
			03-05-2004	03-05-2004	Phones	6:00
		Clark, Kevin	03-18-2004	03-18-2004	Phones	3:45
						22:00
		Clark, Kevin	03-31-2004	03-31-2004	Special Events	2:30
						2:30
		Dakin, Ruth	03-03-2004	03-03-2004	Speakers Bureau	2:00
						2:00
		Edgerton, Giuseppina	03-06-2004	03-06-2004	Phones	6:00
			03-10-2004	03-10-2004	Phones	2:45
			03-10-2004	03-10-2004	Special Events	2:30
			03-05-2004	03-05-2004	Special Events	2:00
		Flynn, Violet	03-03-2004	03-03-2004	Records	3:36
			03-10-2004	03-10-2004	Special Events	2:30
		Green, Harriet	03-10-2004	03-10-2004	Phones	6:06
				2:00		
Henderson, Mary	03-10-2004	03-10-2004	Phones	2:00		
				2:00		
Howard, Jim	03-18-2004	03-18-2004	Special Events	2:00		
				2:00		
Stevens, Walt	03-06-2004	03-06-2004	Phones	2:12		
	03-10-2004	03-10-2004	Special Events	2:30		
	03-18-2004	03-18-2004	Special Events	4:42		
Stevens, Walt	03-18-2004	03-18-2004	Phones	2:00		
	03-27-2004	03-27-2004	Phones	3:30		
	03-31-2004	03-31-2004	Special Events	2:00		
				7:30		
					86:30	
Total						244:57

Printed 04-27-2004 7:05 pm

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### Related help

# All Service by Assignment-Fiscal Yr (stock)

Help topic 8017

Added or revised 05-17-2016

This **stock report** [pg:0595] summarizes volunteer service by **fiscal year** [pg:0062]. By default, it starts with the earliest fiscal year that service is recorded in your database and continues through the current fiscal year. You can change this setting on the **Include tab** [pg:0571] when you run the report.

The report will have sub-totals for each assignment whether it is active or **inactive** [pg:0140]. If you want to modify the report to just include active, or inactive, assignments, you can also do this on the **Include tab** when you run the report.

If you **organize your assignments** [pg:0096] by Sites and Places, the report will also include a sub-total for each Place and Site. There will be a grand total for each fiscal year at the end of the report, and a grand total for each assignment (as well as for each Site and Place if you use them) in the rightmost column.

All Service By Assignment-Fiscal Yr.						
Your Agency Name						
Site	Place	Assignment	FY 12-13 Hours	FY 13-14 Hours	FY 14-15 Hours	Total Hours
Heart Center	Heart Center	Cardiovascular Waiting Room	1,616:00	1,620:00	904:00	4,140:00
		Information Desk	1,836:00	1,936:00	1,076:00	4,848:00
		Total	3,452:00	3,556:00	1,980:00	8,988:00
Total			3,452:00	3,556:00	1,980:00	8,988:00
Main Hospital	Administration	Advisory Council	164:00	192:00	112:00	468:00
		Board Meeting	352:00	476:00	270:00	1,098:00
		Department Assistant	1,664:00	1,832:00	1,024:00	4,520:00
		Patient Advocate	2,304:30	2,304:30	1,290:30	5,899:30
		Special Projects	371:00	251:35	0:00	622:35
		Total	4,855:30	5,056:05	2,696:30	12,608:05
	Community Education	Diabetes Clinic Office Assistant	1,146:00	2,268:00	1,252:00	4,666:00
		Orientation	151:00	17:00	0:00	168:00
		Workshops	414:00	504:00	285:00	1,203:00
		Total	1,711:00	2,789:00	1,537:00	6,037:00
	Emergency Department	Emergency Department	5,362:30	6,136:00	3,408:00	14,906:30
		Total	5,362:30	6,136:00	3,408:00	14,906:30
	Gift Shop	Gift Shop Helper	2,382:00	3,180:00	1,765:00	7,327:00
Gift Shop Manager		2,242:30	3,255:30	1,807:00	7,305:00	

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Site	Place	Assignment	FY 12-13 Hours	FY 13-14 Hours	FY 14-15 Hours	Total Hours
		Physical Therapy Assistant	635:00	634:30	352:30	1,622:00
		Total	2,154:30	2,580:00	1,436:00	6,170:30
	Spiritual Care	Clergy	684:00	1,205:00	680:00	2,569:00
		Spiritual Care Office Assistant	688:00	832:00	456:00	1,976:00
		Total	1,372:00	2,037:00	1,136:00	4,545:00
	Surgery	Joint Replacement Center Aide	472:00	496:00	280:00	1,248:00
		PACU Aide	738:00	1,211:30	672:00	2,621:30
		Surgery Waiting Room	792:00	408:00	228:00	1,428:00
		Total	2,002:00	2,115:30	1,180:00	5,297:30
	Total		36,406:59	43,017:05	23,770:00	103,194:04
	Grand total		39,858:59	46,573:05	25,750:00	112,182:04

Use this report for year-to-year historical or comparison purposes, or if you need to report all service ever performed. If you do not exclude any volunteers from this report in the [Include \[pg:0571\]](#) criteria, and the time period the report covers includes every fiscal year you've had your account, the sum where the *Grand total* row and the *Total Hours* column meet will represent all service entered in your database.

If you'd rather see service information organized by calendar year, you can run the [All Service by Assignment-Calendar Yr \(stock\) \[pg:0673\]](#) report instead. In addition, you can also customize [Service summary \[pg:0580\]](#) reports to

- Show each volunteer's individual service under each assignment
- Show [unduplicated volunteer counts \[pg:0452\]](#)
- Show [Service Measures \[pg:1557\]](#) you track other than volunteer hours
- Show the [value \[pg:0034\]](#) for any service you track
- Show [FTE \[pg:1563\]](#) comparisons for hours
- Show [prior year comparisons \[pg:0575\]](#)

To change the settings on a stock report, click the **Clone it** button after you select the name of the report from the Print menu. This will spin off a copy of the stock report that can be modified.

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## All Service by Type (stock)

Help topic 8018

Added or revised 12-21-2011

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This [stock report \[pg:0595\]](#) summarizes volunteer service by year, starting with the earliest year for which your database has a service entry and continuing through the current year. The report includes a sub-total for volunteer Type. The Type field appears in the Name box on the Core tab, and it is typically used for classifying volunteers by major program type, such as 'adult,' 'junior,' 'student,' 'regular,' 'occasional,' 'auxiliary,' and so forth. Service for volunteers who *do not* have a specific Type appears at the end of the report under the heading "(none)."

A grand total for each year appears at the end of the report, and a grand total for each Type appears in the right most column.

Use this report for year-to-year historical or comparison purposes, or if you need to report all service ever performed.

All Service By Type						
Sample Organization Name						
Type	FY 2000 Hours	FY 2001 Hours	FY 2002 Hours	FY 2003 Hours	FY 2004 Hours	Total Hours
Adult	7,483:00	4,339:00	1,457:00	6,667:00	756:48	20,702:48
Junior	101:00	919:45	525:15	2,803:00	854:09	5,003:09
Grand total	7,584:00	5,258:45	1,982:15	9,270:00	1,610:57	25,705:57

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If you do not exclude any volunteers from this report in the [Include \[pg:0571\]](#) criteria, it will include all service entered in your database.

By default, the report totals volunteer service for each of your organization's [fiscal years \[pg:0062\]](#), starting with the earliest year for which you've entered service. If you create your own [Service summary \[pg:0580\]](#) report you can configure the report to use the calendar year rather than the fiscal year, or include only the years you specify rather than every year that has volunteer service.

In addition, you can customize [Service summary \[pg:0580\]](#) reports to

- Show each volunteer's individual service under each Type
- Show unduplicated volunteer counts
- Show service measures you track other than volunteer hours
- Show the value for any service you track
- Show FTE comparisons for hours
- Show prior year comparisons

#### **Related help**



# All Service by Volunteer (stock)

Help topic 8019

Added or revised 12-21-2011

This [stock report \[pg:0595\]](#) summarizes volunteer service by year, starting with the earliest year for which your database has a service entry and continuing through the current year. The report includes a sub-total for every volunteer.

A grand total for each year appears at the end of the report, and a grand total for each volunteer appears in the right most column.

Use this report for year-to-year historical or comparison purposes, or if you need to report all service ever performed.

All Service By Volunteer						
Sample Organization Name						
Volunteer	FY 2000 Hours	FY 2001 Hours	FY 2002 Hours	FY 2003 Hours	FY 2004 Hours	Total Hours
Applebe, Tom	1,008:15	501:45	108:45	451:30	83:00	2,163:15
Bailey, Harry	11:00	114:00	207:30	984:45	110:12	1,427:27
Bailey, Mary	12:30	326:30	110:45	462:30	36:45	949:00
Ballard, Elizabeth	0:00	216:30	97:15	376:00	60:30	750:15
Bennegin, Keshia	0:00	88:45	110:45	471:45	9:15	680:30
Calbert, Bert	160:15	0:00	0:00	0:00	0:00	160:15
Clark, Janice	0:00	1,156:15	119:45	534:15	115:15	1,925:30
Clark, Kevin	0:00	162:45	101:45	543:00	9:00	816:30
Dakin, Ruth	12:00	662:00	112:00	483:15	30:12	1,299:27
Decker, Elizabeth	0:00	303:30	210:30	1,031:30	9:24	1,554:54
Edgerton, Kimberly	0:00	201:15	113:30	512:00	70:15	897:00
Flynn, Violet	0:00	94:00	113:00	498:15	52:06	755:21
Garcia, Jackie	0:00	364:45	102:15	556:45	7:00	1,030:45
Green, Harriet	0:00	214:30	100:30	560:00	20:30	895:30
Henderson, Mary	0:00	134:15	114:15	497:30	47:00	793:00
Howard, Ernie	0:00	274:00	113:00	520:45	41:36	949:21
Howard, Jim	1,123:00	444:00	146:45	710:15	47:42	2,471:42
McMurphy, Ernie	0:00	0:00	0:00	78:00	26:00	104:00

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Volunteer	FY 2000 Hours	FY 2001 Hours	FY 2002 Hours	FY 2003 Hours	FY 2004 Hours	Total Hours
Rogers, Laura	78:00	0:00	0:00	0:00	0:00	78:00
Ross, Benjamin	0:00	0:00	0:00	0:00	15:45	15:45
Shaw, Roberta	6:00	0:00	0:00	0:00	0:00	6:00
Stevens, Walt	101:00	0:00	0:00	0:00	819:30	920:30
Watson, Elizabeth	5,084:00	0:00	0:00	0:00	0:00	5,084:00
<b>Grand total</b>	<b>7,584:00</b>	<b>5,258:45</b>	<b>1,982:15</b>	<b>9,270:00</b>	<b>1,610:57</b>	<b>25,705:57</b>

If you do not exclude any volunteers from this report in the [Include \[pg:0571\]](#) criteria, it will include all service entered in your database.

By default, the report totals volunteer service for each of your organization's [fiscal years \[pg:0062\]](#), starting with the earliest year for which you've entered service. If you create your own [Service summary \[pg:0580\]](#) report you can configure the report to use the calendar year rather than the fiscal year, or include only the years you specify rather than every year that has volunteer service.

In addition, you can customize [Service summary \[pg:0580\]](#) reports to

- Show service measures you track other than volunteer hours
- Show the value for any service you track
- Show FTE comparisons for hours
- Show prior year comparisons

#### **Related help**

# Monthly Service Comparison by Assignment (stock)

Help topic 8020

Added or revised 12-21-2011

This [stock report \[pg:0595\]](#) summarizes volunteer service for each month in the current [fiscal year \[pg:0062\]](#), plus it compares each month to the same month in the previous year. The report lists service by assignment, with a sub-total for each assignment. If you organize your assignments by Sites and Places, the report also includes sub-totals for each Place and Site.

A grand total for each month appears at the end of the report, and a grand total for each assignment (as well as for each Site and Place if they appear on the report) appears in the right most column.

Use this report for month-to-month [service comparisons \[pg:0575\]](#) by assignment for the current year.

Monthly Service Comparison By Assignment										
January 2004 to February 2004										
Site	Place	Assignment	Jan 2003 Hours	Jan 2004 Hours	Change	Feb 2003 Hours	Feb 2004 Hours	Change	Total Hours	
Main Campus	Administration	Info Desk	122:30	142:51	+ 16.6%	176:30	83:36	- 52.6%	226:27	
		Information services	111:30	4:00	- 96.4%	40:30	32:00	- 31.2%	36:00	
		Records	36:00	24:30	- 31.9%	40:30	12:36	- 72.9%	37:06	
		Speaker's Bureau	0:00	9:30	+ 100%	0:00	0:00	0%	9:30	
		Total	270:00	180:51	- 33.0%	260:30	128:12	- 52.4%	309:03	
	Client Services	Client Advocate	0:00	22:00	+ 100%	0:00	24:21	+ 100%	46:21	
		Transportation Driver	90:00	85:30	- 5.0%	105:30	24:00	- 77.3%	109:30	
		Total	90:00	107:30	+ 19.4%	105:30	48:21	- 54.2%	155:51	
	Education	Adult Tutor	0:00	20:00	+ 100%	0:00	0:00	0%	20:00	
		Docent	0:00	0:00	0%	0:00	0:00	0%	0:00	
		Total	0:00	20:00	+ 100%	0:00	0:00	0%	20:00	
	Outpatient Services	Info Desk	0:00	0:00	0%	0:00	0:00	0%	0:00	
		Total	0:00	0:00	0%	0:00	0:00	0%	0:00	
	Volunteer Office	Phones	Phones	0:00	125:27	+ 100%	0:00	6:00	+ 100%	131:27
			Records	0:00	15:30	+ 100%	0:00	3:00	+ 100%	18:30
			Speakers Bureau	17:45	33:00	+ 85.9%	22:45	43:00	+ 89.0%	76:00
			Special Events	0:00	85:06	+ 100%	0:00	2:00	+ 100%	87:06
		Total	17:45	259:03	+ 1,359.4%	22:45	64:00	+ 137.4%	313:03	
	Total		377:45	567:24	+ 50.2%	397:45	230:33	- 42.0%	797:57	
	South Annex	Volunteer Services	Records	0:00	0:00	0%	0:00	0:00	0%	0:00

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Site	Place	Assignment	Jan 2003 Hours	Jan 2004 Hours	Change	Feb 2003 Hours	Feb 2004 Hours	Change	Total Hours
		Total	0:00	0:00	0%	0:00	0:00	0%	0:00
	Total		0:00	0:00	0%	0:00	0:00	0%	0:00
(None)	(None)	(None)	0:00	0:00	0%	0:00	0:00	0%	0:00
	Total		0:00	0:00	0%	0:00	0:00	0%	0:00
Total			0:00	0:00	0%	0:00	0:00	0%	0:00
Grand total			377:45	567:24	+ 50.2%	397:45	230:33	- 42.0%	797:57

By default, the report totals volunteer service for each month organization's [fiscal year \[pg:0062\]](#) that has passed so far. You can also configure the report to include months from the current calendar year rather than the fiscal year, or to include the specific months you choose.

In addition, you can customize [Service summary \[pg:0580\]](#) reports to

- Show each volunteer's individual service under each assignment
- Show unduplicated volunteer counts
- Show service measures you track other than volunteer hours
- Show the value for any service you track
- Show FTE comparisons for hours
- Exclude prior year comparisons

**Related help**

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## Monthly Service Comparison by Type (stock)

Help topic 8021

Added or revised 12-21-2011

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This [stock report \[pg:0595\]](#) summarizes volunteer service for each month in the current [fiscal year \[pg:0062\]](#), plus it compares each month to the same month in the previous year. The report lists service by Type, with a sub-total for each Type. The Type field appears in the Name box on the Core tab, and it is typically used for classifying volunteers by major program type, such as 'adult,' 'junior,' 'student,' 'regular,' 'occasional,' 'auxiliary,' and so forth. Service for volunteers who *do not* have a specific Type appears at the end of the report under the heading "(none)."

A grand total for each month appears at the end of the report, and a grand total for each Type appears in the right most column.

Use this report for month-to-month [service comparisons \[pg:0575\]](#) by Type for the current year.

Monthly Service Comparison By Type							
January 2004 to February 2004							
Type	Jan 2003 Hours	Jan 2004 Hours	Change	Feb 2003 Hours	Feb 2004 Hours	Change	Total Hours
Adult	292:15	567:24	+ 94.1%	289:15	230:33	- 20.3%	797:57
Junior	85:30	0:00	- 100.0%	108:30	0:00	- 100.0%	0:00
Grand total	377:45	567:24	+ 50.2%	397:45	230:33	- 42.0%	797:57

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By default, the report totals volunteer service for each month organization's [fiscal year \[pg:0062\]](#) that has passed so far. You can also configure the report to include months from the current calendar year rather than the fiscal year, or to include the specific months you choose.

In addition, you can customize [Service summary \[pg:0580\]](#) reports to

- Show each volunteer's individual service under each Type
- Show unduplicated volunteer counts

- Show service measures you track other than volunteer hours
- Show the value for any service you track
- Show FTE comparisons for hours
- Exclude prior year comparisons

**Related help**

## Monthly Service Comparison by Volunteer (stock)

Help topic 8022

Added or revised 12-21-2011

This [stock report \[pg:0595\]](#) summarizes volunteer service for each month in the current [fiscal year \[pg:0062\]](#), plus it compares each month to the same month in the previous year. The report lists service by volunteer, with a sub-total for each volunteer.

A grand total for each month appears at the end of the report, and a grand total for each volunteer appears in the right most column.

Use this report for month-to-month [service comparisons \[pg:0575\]](#) by volunteer for the current year.

Monthly Service Comparison By Volunteer							
January 2004 to February 2004							
Volunteer	Jan 2003 Hours	Jan 2004 Hours	Change	Feb 2003 Hours	Feb 2004 Hours	Change	Total Hours
Applebe, Tom	15:00	09:06	+ 380.7%	21:00	24:30	+ 18.7%	545:06
Bailey, Harry	31:00	07:06	+ 116.5%	42:00	35:36	- 15.2%	1,087:27
Bailey, Mary	15:00	03:15	+ 321.7%	22:15	4:00	- 82.0%	529:45
Ballard, Elizabeth	16:45	19:00	+ 13.4%	23:15	34:00	+ 46.2%	429:00
Bennegin, Keshia	15:00	0:00	- 100.0%	22:15	0:00	- 100.0%	471:45
Clark, Janice	17:45	01:45	+ 247.9%	22:45	43:00	+ 89.0%	639:00
Clark, Kevin	18:30	0:00	- 100.0%	21:00	0:00	- 100.0%	543:00
Dakin, Ruth	15:00	17:36	+ 17.3%	23:00	6:00	- 73.9%	506:51
Decker, Elizabeth	33:30	0:00	- 100.0%	44:00	0:00	- 100.0%	1,031:30
Edgerton, Kimberly	16:45	58:00	+ 246.3%	23:15	3:00	- 87.1%	573:00
Flynn, Violet	16:15	37:30	+ 130.8%	21:00	5:00	- 76.2%	538:45
Garcia, Jackie	18:30	0:00	- 100.0%	21:15	0:00	- 100.0%	556:45
Green, Harriet	18:30	45:36	+ 146.5%	21:15	1:00	- 95.3%	608:36
Henderson, Mary	16:15	30:30	+ 87.7%	23:00	13:30	- 41.3%	541:30
Howard, Ernie	18:00	18:00	0%	23:15	12:36	- 45.8%	551:21
Howard, Jim	18:00	27:30	+ 52.8%	23:15	8:36	- 63.0%	746:21
McMurphy, Ernie	78:00	24:30	- 68.6%	0:00	24:00	+ 100%	126:30
Ross, Benjamin	0:00	28:00	+ 100%	0:00	15:45	+ 100%	43:45
Grand total	377:45	567:24	+ 50.2%	397:45	230:33	- 42.0%	797:57

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By default, the report totals volunteer service for each month organization's [fiscal year \[pg:0062\]](#) that has passed so far. You can also configure the report to include months from the current calendar year rather than the fiscal year, or to include the specific months you choose.

In addition, you can customize [Service summary \[pg:0580\]](#) reports to

- Show service measures you track other than volunteer hours
- Show the value for any service you track
- Show FTE comparisons for hours
- Exclude prior year comparisons

**Related help**



# Monthly Service by Assignment (stock)

Help topic 8023

Added or revised 12-21-2011

This [stock report \[pg:0595\]](#) summarizes volunteer service for each month in the current [fiscal year \[pg:0062\]](#). For each month, the report includes a column for volunteers hours and a column with the [unduplicated volunteer count \[pg:0452\]](#) for the month.

The report lists service by assignment, with a sub-total for each assignment. If you organize your assignments by Sites and Places, the report also includes sub-totals for each Place and Site.

A grand total for each month appears at the end of the report, and a grand total for each assignment (as well as for each Site and Place if they appear on the report) appears in the right most column.

Use this report to show month-to-month service by assignment for the current year.

Monthly Service By Assignment									
January 2004 to February 2004									
Site	Place	Assignment	Jan 2004 Hours	Jan 2004 Volunteer Count	Feb 2004 Hours	Feb 2004 Volunteer Count	Total Hours	Total Volunteer Count	
Main Campus	Administration	Info Desk	142:51	14	83:36	7	226:27	14	
		Information services	4:00	1	32:00	1	36:00	1	
		Records	24:30	3	12:36	1	37:06	3	
		Speaker's Bureau	9:30	3	0:00	0	9:30	3	
		Total	180:51	14	128:12	8	309:03	14	
	Client Services	Client Advocate	22:00	1	24:21	3	46:21	3	
		Transportation Driver	85:30	14	24:00	1	109:30	14	
		Total	107:30	14	48:21	4	155:51	14	
	Education	Adult Tutor	20:00	3	0:00	0	20:00	3	
		Docent	0:00	0	0:00	0	0:00	0	
		Total	20:00	3	0:00	0	20:00	3	
	Outpatient Services	Info Desk	0:00	0	0:00	0	0:00	0	
		Total	0:00	0	0:00	0	0:00	0	
	Volunteer Office	Phones	Records	125:27	5	6:00	3	131:27	5
			Records	15:30	2	3:00	1	18:30	2
			Speakers Bureau	33:00	1	43:00	1	76:00	1
			Special Events	85:06	6	2:00	1	87:06	6
		Total	259:03	10	54:00	6	313:03	10	

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Site	Place	Assignment	Jan 2004 Hours	Jan 2004 Volunteer Count	Feb 2004 Hours	Feb 2004 Volunteer Count	Total Hours	Total Volunteer Count
	Total		567:24	14	230:33	14	797:57	14
South Annex	Volunteer Services	Records	0:00	0	0:00	0	0:00	0
		Total	0:00	0	0:00	0	0:00	0
	Total		0:00	0	0:00	0	0:00	0
(None)	(None)	(None)	0:00	0	0:00	0	0:00	0
	Total		0:00	0	0:00	0	0:00	0
	Total		0:00	0	0:00	0	0:00	0
<b>Grand total</b>			<b>567:24</b>	<b>14</b>	<b>230:33</b>	<b>14</b>	<b>797:57</b>	<b>14</b>

By default, the report totals volunteer service for each month organization's [fiscal year \[pg:0062\]](#) that has passed so far. You can also configure the report to include months from the current calendar year rather than the fiscal year, or to include the specific months you choose.

In addition, you can customize [Service summary \[pg:0580\]](#) reports to

- Show each volunteer's individual service under each assignment
- Exclude unduplicated volunteer counts
- Show service measures you track other than volunteer hours
- Show the value for any service you track
- Show FTE comparisons for hours
- Show prior year comparisons

#### **Related help**

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## Monthly Service by Type (stock)

Help topic 8024

Added or revised 12-21-2011

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This [stock report \[pg:0595\]](#) summarizes volunteer service for each month in the current [fiscal year \[pg:0062\]](#). For each month, the report includes a column for volunteers hours and a column with the [unduplicated volunteer count \[pg:0452\]](#) for the month.

The report lists service by volunteer Type, with a sub-total for each Type. The Type field appears in the Name box on the Core tab, and it is typically used for classifying volunteers by major program type, such as 'adult,' 'junior,' 'student,' 'regular,' 'occasional,' 'auxiliary,' and so forth. Service for volunteers who *do not* have a specific Type appears at the end of the report under the heading "(none)."

A grand total for each month appears at the end of the report, and a grand total for each Type appears in the right most column.

Use this report to show month-to-month service by Type for the current year.

Monthly Service By Type January 2004 to February 2004						
Type	Jan 2004 Hours	Jan 2004 Volunteer Count	Feb 2004 Hours	Feb 2004 Volunteer Count	Total Hours	Total Volunteer Count
Adult	567:24	14	230:33	14	797:57	14
Junior	0:00	0	0:00	0	0:00	0
Grand total	567:24	14	230:33	14	797:57	14

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By default, the report totals volunteer service for each month organization's [fiscal year \[pg:0062\]](#) that has passed so far. You can also configure the report to include months from the current calendar year rather than the fiscal year, or to include the specific months you choose.

In addition, you can customize [Service summary \[pg:0580\]](#) reports to

- Show each volunteer's individual service under each assignment
- Exclude unduplicated volunteer counts
- Show service measures you track other than volunteer hours
- Show the value for any service you track
- Show FTE comparisons for hours
- Show prior year comparisons

**Related help**

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## Monthly Service by Volunteer (stock)

Help topic 8025

Added or revised 12-21-2011

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This [stock report \[pg:0595\]](#) summarizes volunteer service for each month in the current [fiscal year \[pg:0062\]](#) by volunteer, with a sub-total for each volunteer.

A grand total for each month appears at the end of the report, and a grand total for each Type appears in the right most column.

Use this report to show month-to-month service by volunteer for the current year.

Monthly Service By Volunteer			
January 2004 to February 2004			
Volunteer	Jan 2004 Hours	Feb 2004 Hours	Total Hours
Applebe, Tom	69:06	24:30	93:36
Bailey, Harry	67:06	35:36	102:42
Bailey, Mary	63:15	4:00	67:15
Ballard, Elizabeth	19:00	34:00	53:00
Clark, Janice	61:45	43:00	104:45
Dakin, Ruth	17:36	6:00	23:36
Edgerton, Kimberly	56:00	3:00	61:00
Flynn, Violet	37:30	5:00	42:30
Green, Harriet	45:36	1:00	46:36
Henderson, Mary	30:30	13:30	44:00
Howard, Ernie	18:00	12:36	30:36
Howard, Jim	27:30	8:36	36:06
McMurphy, Ernie	24:30	24:00	48:30
Ross, Benjamin	26:00	15:45	43:45
<b>Grand total</b>	<b>567:24</b>	<b>230:33</b>	<b>797:57</b>

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By default, the report totals volunteer service for each month organization's [fiscal year \[pg:0062\]](#) that has passed so far. You can also configure the report to include months from the current calendar year rather than the fiscal year, or to include the specific months you choose.

In addition, you can customize [Service summary \[pg:0580\]](#) reports to

- Show service measures you track other than volunteer hours
- Show the value for any service you track
- Show FTE comparisons for hours
- Show prior year comparisons

### Related help

## Service Values (stock)

Help topic 8026

Added or revised 12-21-2011

This [stock report \[pg:0595\]](#) summarizes volunteer service and service values for the [fiscal year \[pg:0062\]](#) selected in the [Include criteria](#). The report calculates service value based on the values setup for your organization.

The report lists service and values by assignment, with a sub-total for each assignment. If you organize your assignments by Sites and Places, the report also includes sub-totals for each Place and Site.

A grand total for each month appears at the end of the report, and a grand total for each assignment (as well as for each Site and Place if they appear on the report) appears in the right most column.

Use this report to show the monetary value of volunteer service for a selected year or range of years.

Service Value January 2003 to December 2003					
Site	Place	Assignment	FY 2003 Hours	FY 2003 Hours Value	
Main Campus	Administration	Info Desk	3,756:15	\$45,075.00	
		Information services	940:45	\$11,289.00	
		Records	1,043:15	\$12,519.00	
		Speaker's Bureau	0:00	\$0.00	
		Total	5,740:15	\$68,883.00	
	Client Services	Client Advocate	0:00	\$0.00	
		Transportation Driver	2,681:30	\$32,178.00	
		Total	2,681:30	\$32,178.00	
	Education	Adult Tutor	0:00	\$0.00	
		Docent	0:00	\$0.00	
		Total	0:00	\$0.00	
	Outpatient Services	Info Desk	0:00	\$0.00	
		Total	0:00	\$0.00	
	Volunteer Office	Total	Phones	187:45	\$2,253.00
			Records	0:00	\$0.00
Speakers Bureau			534:15	\$6,411.00	
Special Events			126:15	\$1,515.00	

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Site	Place	Assignment	FY 2003 Hours	FY 2003 Hours Value
	Total	Total	848:15	\$10,179.00
	Total		9,270:00	\$111,240.00
South Annex	Volunteer Services	Records	0:00	\$0.00
	Total	Total	0:00	\$0.00
(None)	(None)	(None)	0:00	\$0.00
	Total	Total	0:00	\$0.00
Grand total			9,270:00	\$111,240.00

You can customize Service summary reports to

- Show each volunteer's individual service and value under each assignment
- Show unduplicated volunteer counts
- Show service measures you track other than volunteer hours
- Show the value for other service you track
- Show FTE comparisons for hours
- Show prior year comparisons

**Related help**

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## Coordinator Address Labels (stock)

Help topic 8027

Added or revised 09-30-2016

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This [stock \[pg:0595\]](#) report prints mailing labels for Coordinators you track in Volgistics. It works with sheet fed labels for laser or ink jet printers, such as Avery 5160 label sheets.

Each time you print this report you can use the [Include window \[pg:0479\]](#) to specify which Coordinators you want to print labels for.

Labels printed: 0 Printed: 07-23-2004 7:23 am	Mr. George Herbert 6364 Elm Street Bedford Falls, 12345	Mr. Henry Hoover 6766 Mission Avenue Bedford Falls, IN 12345
Mr. Randy Johnson 123 Elm Street Smithville, KY 36201	Ms. Betsy Peterson 7839 4th Street Mt. Pilot, IN 12345	Ms. Sally Unger 6787 1st Street Bedford Falls, 12345
Ms. Janice Watson 6787 1st Street Bedford Falls, IN 12345		

### Related help



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## Volunteer Address Labels (stock)

Help topic 8028

Added or revised 09-30-2016

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This [stock \[pg:0595\]](#) report prints mailing labels for Volunteers. It works with sheet fed labels for laser or ink jet printers, such as Avery 5160 label sheets.

Each time you print this report you can use the [Include window \[pg:0479\]](#) to specify which Volunteers you want to print labels for.

Mailing labels include the volunteer's name and mailing address. If you need labels with other kinds of information consider using a [Labels \[pg:0523\]](#) report instead.

Labels printed: 28 Printed: 07-23-2004 7:29 am	Mr. Tom Applebe 6876 Howard Avenue Bedford Falls, IN 12345-1234	Mr. Harry Bailey 2454 Elm Street Bedford Falls, IN 12345-8912
Mrs. Mary Bailey 320 Sycamore Bedford Falls, IN 12345-9288	Mrs. Elizabeth Ballard 819 Elm Street Pottersville, IN 36102	Ms. Keshia Bennegin 612 1st Avenue Bedford Falls, IN 12345-2822
Mr. Bert Calbert 120 Elm Street Bedford Falls, IN 12345	Mrs. Janice Clark 1818 Manner Drive Bedford Falls, IN 12345-9292	Mr. Kevin Clark 7002 Second Avenue Mt. Pilot, IN 36201-2922
Ms. Ruth Dakin 6712 Oak Street Bedford Falls, IN 12345	Ms. Elizabeth Decker 23876 Sunset Blvd. Mt. Pilot, IN 36201-2822	Ms. Giuseppina Edgerton 8791 Maple Street Bedford Falls, IN 12345-2922
Ms. Violet Flynn 281 Maple Street Bedford Falls, IN 12345	Ms. Jackie Garcia 3299 1st Street Bedford Falls, IN 12345-2999	Ms. Harriet Green 817 South Street North Bedford, IN 12344-2811
Ms. Mary Henderson 618 12th Avenue Bedford Falls, IN 12345-1211	Mr. Ernie Howard 8712 Oak Street Apartment 12 Mt. Pilot, IN 12366	Mr. Jim Howard 7823 Main Street Mt. Pilot, IN 36202-9011
Mr. William Jacobs 58 Smithville Blvd Pottersville, IN 36105	Mrs. Martha Larson 123 Elm Street Bedford Falls, IN 12345-1211	Mr. Ernie McMurphy 1203 Second Street North Bedford, IN 12344
Ms. Laura Rogers 317 Kirkwood Apt 42 Bedford Falls, IN 12345-8721	Mr. Benjamin Ross 817 South Street North Bedford, IN 12344	Ms. Roberta Shaw 728 E 11th Street Bedford Falls, IN 12345-8112
Mr. Walt Stevens 7987 2nd Street Mt. Pilot, IN 12344	Ms. Elizabeth Watson 8192 Third Street Mt. Pilot, IN 36201-7811	Mr. Sam Weinwright 2371 Maple Street Bedford Falls, IN 12345
Mr. Ron Willis 9122 Ellsworth Bedford Falls, IN 12345-9812	Ms. Nancy Wilson 812 1st Street Apt 68 Bedford Falls, IN 12345	

### Related help

# Volunteer Bulk Mailing Labels (stock)

Help topic 8029

Added or revised 12-22-2011

This [stock \[pg:0595\]](#) report prints mailing labels for Volunteers. It works with sheet fed labels for laser or ink jet printers, such as Avery 5160 label sheets.

Each time you print this report you can use the [Include window \[pg:0479\]](#) to specify which Volunteers you want to print labels for.

This stock reports prints labels optimized for large mailings that must conform to postal service bulk mail regulations:

- Postnet bar codes are printed for all US addresses
- Labels are printed all uppercase
- Labels are sorted by zip or post code
- Labels are omitted for volunteer records that do not contain a zip or post code

LABELS PRINTED: 28 PRINTED: 07-23-2004 7:32 AM	MR. ERNIE MCMURPHY 1203 SECOND STREET NORTH BEDFORD, IN 12344	MR. BENJAMIN ROSS 817 SOUTH STREET NORTH BEDFORD, IN 12344
MR. WALT STEVENS 7987 2ND STREET MT. PILOT, IN 12344	MS. HARRIET GREEN 817 SOUTH STREET NORTH BEDFORD, IN 12344-2811	MR. BERT CALBERT 120 ELM STREET BEDFORD FALLS, IN 12345
MS. RUTH DAKIN 6712 OAK STREET BEDFORD FALLS, IN 12345	MR. SAM WEINWRIGHT 2371 MAPLE STREET BEDFORD FALLS, IN 12345	MS. VIOLET FLYNN 281 MAPLE STREET BEDFORD FALLS, IN 12345
MS. NANCY WILSON 812 1ST STREET APT 58	MS. MARY HENDERSON 818 12TH AVENUE BEDFORD FALLS, IN 12345-1211	MRS. MARTHA LARSON 123 ELM STREET BEDFORD FALLS, IN 12345-1211
MR. TOM APPLEBE 6878 HOWARD AVENUE BEDFORD FALLS, IN 12345-1234	MS. KESHIA BENNEGIN 812 1ST AVENUE BEDFORD FALLS, IN 12345-2822	MS. GIUSEPPINA EDGERTON 8791 MAPLE STREET BEDFORD FALLS, IN 12345-2822
MS. JACKIE GARCIA 3299 1ST STREET BEDFORD FALLS, IN 12345-2899	MS. ROBERTA SHAW 728 E 11TH STREET BEDFORD FALLS, IN 12345-8112	MS. LAURA ROGERS 317 KIRKWOOD APT 42
MR. HARRY BAILEY 2454 ELM STREET BEDFORD FALLS, IN 12345-8912	MRS. MARY BAILEY 320 SYCAMORE BEDFORD FALLS, IN 12345-9288	MRS. JANICE CLARK 1818 MANNER DRIVE BEDFORD FALLS, IN 12345-9292
MR. RON WILLIS 8122 ELLSWORTH BEDFORD FALLS, IN 12345-9812	MR. ERNIE HOWARD 8712 OAK STREET APARTMENT 12	MRS. ELIZABETH BALLARD 819 ELM STREET POTTERSVILLE, IN 36102
MR. WILLIAM JACOBS 58 SMITHVILLE BLVD POTTERSVILLE, IN 36105	MS. ELIZABETH DECKER 23878 SUNSET BLVD. MT. PILOT, IN 38201-2822	MR. KEVIN CLARK 7002 SECOND AVENUE MT. PILOT, IN 38201-2922
MS. ELIZABETH WATSON 8192 THIRD STREET MT. PILOT, IN 38201-7811	MR. JIM HOWARD 7823 MAIN STREET MT. PILOT, IN 38202-9011	

**Related help**

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## File Folder Labels (stock)

Help topic 8030

Added or revised 12-22-2011

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This [stock \[pg:0595\]](#) report prints labels suitable for labeling file folders. It works with sheet fed file folder labels for laser or ink jet printers, such as Avery 5266 label sheets. These labels are useful if you create file folders for each volunteer.

Each time you print this report you can use the [Include window \[pg:1338\]](#) to specify which Volunteers you want to print file folder labels for. For example, if you need labels for just a few new volunteers, you could tag their records in Volgistics and then print file folder labels for only the tagged volunteers.

Applebe, Tom Adult	Bailey, Harry Adult
Bailey, Mary Adult	Ballard, Elizabeth Adult
Bennegin, Keshia Junior	Calbert, Bert Adult
Clark, Janice Adult	Clark, Kevin Junior
Dakin, Ruth Adult	Decker, Elizabeth Junior
Edgerton, Giuseppina Adult	Flynn, Violet Adult
Garcia, Jackie Junior	Green, Harriet Adult
Henderson, Mary Adult	Howard, Ernie Adult
Howard, Jim Adult	Jacobs, William Adult
Larson, Martha Adult	McMurphy, Ernie Adult
Rogers, Laura Adult	Ross, Benjamin Adult
Shaw, Roberta Adult	Stevens, Wait Junior
Watson, Elizabeth Adult	Weinwright, Sam Adult
Willis, Ron Adult	Wilson, Nancy Adult

### Related help

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## Labels with Assignments (stock)

Help topic 8031

Added or revised 12-22-2011

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This [stock \[pg:0595\]](#) report prints labels with the volunteer's name and Assignment. It works with sheet fed labels for laser or ink jet printers, such as Avery 5160 label sheets.

The first line on each label contains the volunteer's name. Then, for each Assignment in the volunteer's record, the label shows the Assignment name followed by the volunteer's Role in the assignment. For an example, look at the first label shown below. This label is for a volunteer named 'Tom Applebe.' Tom Applebe has two assignments: 'Info Desk' in Administration, for which his role is 'Assigned;' and 'Phones' in the Volunteer Office, for which his role is 'Substitute.'

Each time you print this report you can use the [Include window \[pg:1338\]](#) to specify which Volunteers you want to print labels for.

You can use these labels for such purposes as labeling pre-printed time sheets or event volunteer registration packages, where it would be important to know what the volunteer's assignments are.

Applebe, Tom Info Desk [Administration] Assigned Phones [Volunteer Office] Substitute	Bailey, Harry Info Desk [Administration] Referral Transportation Driver [Client Services] Referral	Bailey, Mary Info Desk [Administration] Assigned
Ballard, Elizabeth Patient Intake [Administration] Assigned	Bennequin, Keshia	Calbert, Bert Info Desk [Administration] Inactive
Clark, Janice Speakers Bureau [Volunteer Office] Inactive	Clark, Kevin Transportation Driver [Client Services] Assigned	Dakin, Ruth Info Desk [Administration] Referral
Decker, Elizabeth Info Desk [Administration] Assigned Transportation Driver [Client Services] Assigned	Edgerton, Giuseppina Phones [Volunteer Office] Assigned	Flynn, Violet Info Desk [Administration] Assigned
Garcia, Jackie Speaker's Bureau [Administration] Assigned Speaker's Bureau [Administration] Referral	Green, Harriet Transportation Driver [Client Services] Assigned	Henderson, Mary Info Desk [Administration] Assigned
Howard, Ernie Info Desk [Administration] Substitute Records [Administration] Preference	Howard, Jim Client Advocate [Client Services] Substitute Phones [Volunteer Office] Substitute	Jacobs, William Client Advocate [Client Services] Assigned Info Desk [Administration] Referral
Larson, Martha Phones [Volunteer Office] Assigned	McMurphy, Ernie Transportation Driver [Client Services] Assigned	Rogers, Laura Phones [Volunteer Office] Referral Transportation Driver [Client Services] Inactive
Ross, Benjamin Client Advocate [Client Services] Assigned	Shaw, Roberta Speakers Bureau [Volunteer Office] Assigned	Stevens, Walt Phones [Volunteer Office] Assigned Transportation Driver [Client Services] Assigned
Watson, Elizabeth Phones [Volunteer Office] Assigned	Weinwright, Sam Speakers Bureau [Volunteer Office] Assigned	Willis, Ron Info Desk [Administration] Assigned Phones [Volunteer Office] Substitute
Wilson, Nancy Client Advocate [Client Services] Assigned		

**Related help**

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## Labels with Flags (stock)

Help topic 8032

Added or revised 12-22-2011

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This [stock \[pg:0595\]](#) report prints labels with the volunteer's name and Flags. It works with sheet fed labels for laser or ink jet printers, such as Avery 5160 label sheets.

The first line on each label contains the volunteer's name, followed by the volunteer's Flags. For an example, look at the first label shown below. This label is for a volunteer named 'Tom Applebe.' Tom Applebe has three Flags: 'Blue team,' 'Regular,' and 'Telephone Pioneer.'

Flags appear in the Flag box on the Core tab for each volunteer. Flags are typically used to classify volunteers into different overlapping groups, such as 'board of directors,' 'donor,' 'sponsor,' 'day of caring,' 'red team,' and so forth.

Each time you print this report you can use the [Include window \[pg:1338\]](#) to specify which Volunteers you want to print labels for.

You can use these labels for such purposes as labeling pre-printed time sheets or event volunteer registration packages, where it would be important to know how the volunteer is classified.

Applebe, Tom Blue Team Regular Telephone Pioneer	Bailey, Harry Green Team Regular	Bailey, Mary Auxiliary Red Team RSVP
Ballard, Elizabeth Auxiliary Regular	Bennegin, Keshia	Calbert, Bert Day of caring Red Team Regular Telephone Pioneer
Clark, Janice Auxiliary	Clark, Kevin Day of caring Red Team	Dakin, Ruth Blue Team
Decker, Elizabeth Auxiliary Red Team RSVP	Edgerton, Giuseppina Regular	Flynn, Violet Blue Team Telephone Pioneer
Garcia, Jackie RSVP Telephone Pioneer	Green, Harriet Auxiliary	Henderson, Mary Green Team RSVP Telephone Pioneer
Howard, Ernie Telephone Pioneer	Howard, Jim Blue Team Regular	Jacobs, William Red Team Regular
Larson, Martha Blue Team Day of caring Regular RSVP	McMurphy, Ernie RSVP	Rogers, Laura Blue Team RSVP
Ross, Benjamin Day of caring RSVP Telephone Pioneer	Shaw, Roberta Telephone Pioneer	Stevens, Walt Blue Team Regular Telephone Pioneer
Watson, Elizabeth Auxiliary Regular	Weinwright, Sam Regular	Willis, Ron Telephone Pioneer
Wilson, Nancy RSVP Telephone Pioneer		

## Related help



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## Labels with Life Hours (stock)

Help topic 8033

Added or revised 12-22-2011

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This [stock \[pg:0595\]](#) report prints labels with the volunteer's name and their Life Hours. It works with sheet fed labels for laser or ink jet printers, such as Avery 5160 label sheets.

The first line on each label contains the volunteer's name, followed by their Life Hours. Life Hours are the sum of all hours recorded in the database for each volunteer. You can use these labels for such purposes as labeling volunteer recognition materials, where it would be important to see each volunteer's hours on a label.

Each time you print this report you can use the [Include window \[pg:1338\]](#) to specify which Volunteers you want to print labels for.

You can customize your own Label reports to include other service statistics other than (or in addition to) Life Hours.

Applebe, Tom 571:30	Bailey, Harry 69:00	Bailey, Mary 539:55
Ballard, Elizabeth 195:35	Bennegin, Keshia 14:15	Calbert, Bert 0:00
Clark, Janice 63:10	Clark, Kevin 1,078:37	Dakin, Ruth 53:50
Decker, Elizabeth 645:57	Edgerton, Giuseppina 43:50	Flynn, Violet 668:55
Garcia, Jackie 280:40	Green, Harriet 0:00	Henderson, Mary 98:35
Howard, Ernie 311:55	Howard, Jim 1,379:35	Jacobs, William 122:52
Larson, Martha 657:55	McMurphy, Ernie 0:00	Rogers, Laura 42:50
Ross, Benjamin 0:00	Shaw, Roberta 54:40	Stevens, Walt 19:00
Watson, Elizabeth 394:15	Weinwright, Sam 427:25	Willis, Ron 71:40
Wilson, Nancy 110:00		

## Related help

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## Labels with Schedules (stock)

Help topic 8034

Added or revised 12-22-2011

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This [stock \[pg:0595\]](#) report prints labels with the volunteer's name and their Schedule. It works with sheet fed labels for laser or ink jet printers, such as Avery 5263 label sheets.

The first line on each label contains the volunteer's name. Then, for each time the volunteer is scheduled during a time period you specify, the label shows

- date scheduled
- name of the Assignment they are scheduled for
- times scheduled

For an example, look at the first label shown below. This label is for a volunteer named 'Tom Applebe.' Tom Applebe is scheduled twice. First on 09-22-2004 in an Assignment called 'Setup logistics,' from 1:00 p.m. to 6:00 p.m. His second scheduled shift is on 09-23-2004 in an Assignment called 'Finish line,' from 7:30 a.m. to 10:00 a.m.

These labels are useful for labeling volunteer material packets at special events. Arriving volunteers can easily see and confirm their schedule when they check-in and receive their packets.

When printing this report, be sure to select the time period you want to include schedule information for. You specify this time period on the [Include window \[pg:1338\]](#) each time you print the report.

<p>Applebe, Tom 09-22-2004 Setup Logistics [Annual 10K Run] 1:00 p to 8:00 p</p> <p>09-23-2004 Finish line [Annual 10K Run] 7:30 a to 10:00 a</p>	<p>Bailey, Harry 09-22-2004 Setup Logistics [Annual 10K Run] 1:00 p to 8:00 p</p> <p>09-23-2004 Finish line [Annual 10K Run] 7:30 a to 10:00 a</p>
<p>Bailey, Mary 09-22-2004 Setup Logistics [Annual 10K Run] 1:00 p to 8:00 p</p>	<p>Ballard, Elizabeth 09-22-2004 Setup Logistics [Annual 10K Run] 1:00 p to 8:00 p</p>
<p>Bennegin, Keshia 09-22-2004 Setup Logistics [Annual 10K Run] 1:00 p to 8:00 p</p> <p>09-23-2004 Water station A [Annual 10K Run] 7:30 a to 10:30 a</p>	<p>Calbert, Bert 09-23-2004 Finish line [Annual 10K Run] 7:30 a to 10:00 a</p> <p>09-23-2004 Awards Lunch Server [Annual 10K Run] 11:30 a to 1:30 p</p>
<p>Clark, Janice 09-23-2004 Finish line [Annual 10K Run] 7:30 a to 10:00 a</p> <p>09-23-2004 Awards Lunch Server [Annual 10K Run] 11:30 a to 1:30 p</p>	<p>Clark, Kevin 09-22-2004 Setup Logistics [Annual 10K Run] 1:00 p to 8:00 p</p>
<p>Dakin, Ruth 09-23-2004 Water Station B [Annual 10K Run] 7:30 a to 10:30 a</p> <p>09-23-2004 Awards Lunch Server [Annual 10K Run] 11:30 a to 1:30 p</p>	<p>Decker, Elizabeth 09-22-2004 Setup Logistics [Annual 10K Run] 1:00 p to 8:00 p</p> <p>09-23-2004 Volunteer Check-in [Annual 10K Run] 6:00 a to 7:30 a</p>

## Related help

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## Labels with Type (stock)

Help topic 8035

Added or revised 12-22-2011

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This [stock \[pg:0595\]](#) report prints labels with the volunteer's name and their volunteer Type. It works with sheet fed labels for laser or ink jet printers, such as Avery 5160 label sheets.

The first line on each label contains the volunteer's name, followed by the volunteer's Type. The Type field appears in the Name box on the Core tab, and it is typically used for classifying volunteers by major program type, such as 'adult,' 'junior,' 'student,' 'regular,' 'occasional,' 'auxiliary,' and so forth.

Each time you print this report you can use the [Include window \[pg:1338\]](#) to specify which Volunteers you want to print labels for.

You can use these labels for such purposes as labeling pre-printed time sheets or event volunteer registration packages, where it would be important to know the volunteer's Type.

Applebe, Tom Adult	Bailey, Harry Adult	Bailey, Mary Adult
Ballard, Elizabeth Adult	Bennegin, Keshia Junior	Calbert, Bert Adult
Clark, Janice Adult	Clark, Kevin Junior	Dakin, Ruth Adult
Decker, Elizabeth Junior	Edgerton, Giuseppina Adult	Flynn, Violet Adult
Garcia, Jackie Junior	Green, Harriet Adult	Henderson, Mary Adult
Howard, Ernie Adult	Howard, Jim Adult	Jacobs, William Adult
Larson, Martha Adult	McMurphy, Ernie Adult	Rogers, Laura Adult
Ross, Benjamin Adult	Shaw, Roberta Adult	Stevens, Walt Junior
Watson, Elizabeth Adult	Weinwright, Sam Adult	Willis, Ron Adult
Wilson, Nancy Adult		

**Related help**

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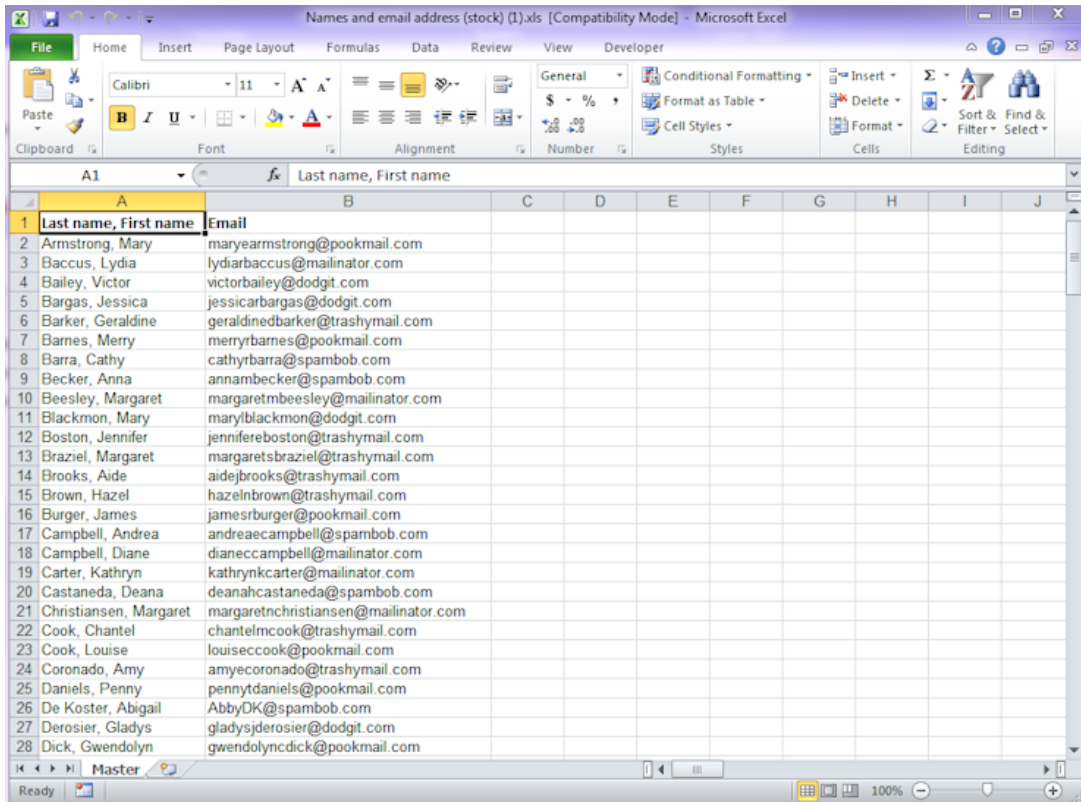
## Names and Email Addresses (stock)

Help topic 8036

Added or revised 12-05-2014

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This report creates an [Excel spreadsheet \[pg:0513\]](#) file with one column for the volunteer name, and one column for the volunteer's email address. This report is useful for copying volunteer email addresses into external address books.



The screenshot shows a Microsoft Excel spreadsheet titled "Names and email address (stock) (1).xls [Compatibility Mode] - Microsoft Excel". The spreadsheet has two columns: "Last name, First name" and "Email". The data is as follows:

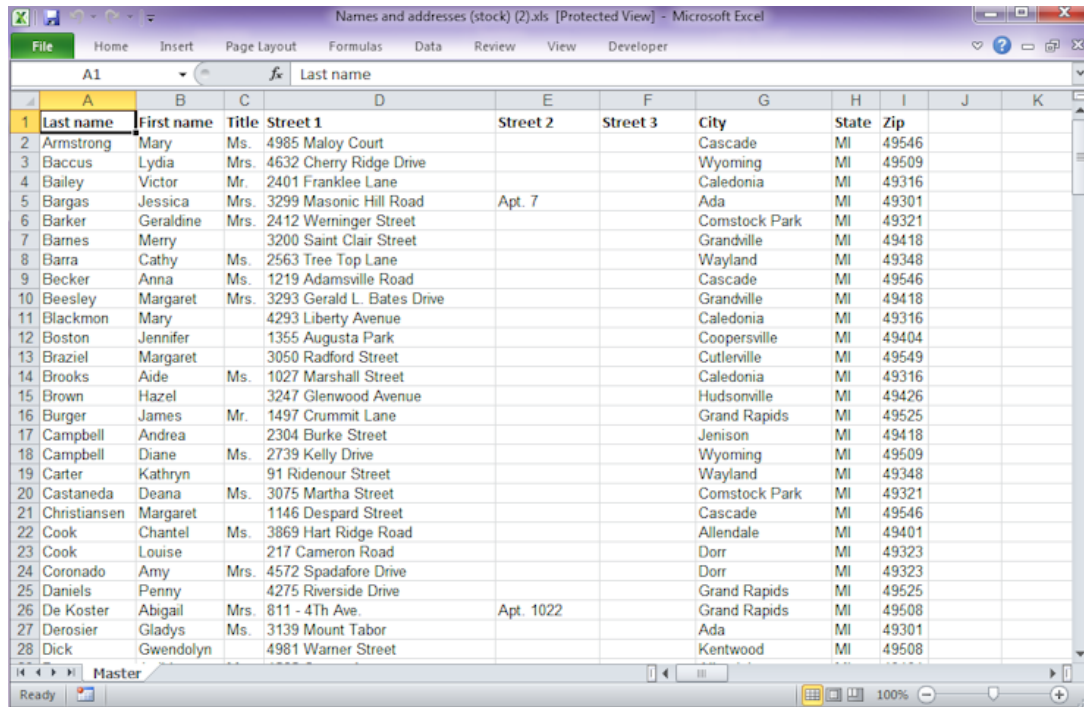
	Last name, First name	Email
1	Armstrong, Mary	maryearmstrong@pookmail.com
2	Baccus, Lydia	lydiarbaccus@mailinator.com
3	Bailey, Victor	victorbailey@dodgit.com
4	Bargas, Jessica	jessicarbargas@dodgit.com
5	Barker, Geraldine	geraldinebarker@trashymail.com
6	Barnes, Merry	merrybarnes@pookmail.com
7	Barra, Cathy	cathybarra@spambob.com
8	Becker, Anna	annabecker@spambob.com
9	Beesley, Margaret	margaretbeesley@mailinator.com
10	Blackmon, Mary	maryblackmon@dodgit.com
11	Boston, Jennifer	jennifereboston@trashymail.com
12	Braziel, Margaret	margaretsbraziel@trashymail.com
13	Brooks, Aide	aidejbrooks@trashymail.com
14	Brown, Hazel	hazelnbrown@trashymail.com
15	Burger, James	jamesrburger@pookmail.com
16	Campbell, Andrea	andreaecampbell@spambob.com
17	Campbell, Diane	dianeccampbell@mailinator.com
18	Carter, Kathryn	kathryncarter@mailinator.com
19	Castaneda, Deana	deanahcastaneda@spambob.com
20	Christiansen, Margaret	margaretnchristiansen@mailinator.com
21	Cook, Chantel	chantelmcook@trashymail.com
22	Cook, Louise	louiseccook@pookmail.com
23	Coronado, Amy	amyecoronado@trashymail.com
24	Daniels, Penny	pennytdaniels@pookmail.com
25	De Koster, Abigail	AbbyDK@spambob.com
26	Derosier, Gladys	gladysjerosier@dodgit.com
27	Dick, Gwendolyn	gwendolyncdick@pookmail.com
28		

# Names and Addresses (stock)

Help topic 8037

Added or revised 09-30-2016

This report creates an [Excel spreadsheet \[pg:0513\]](#) file with columns for volunteer name (last and first), street address, city, state or province, and zip or post code. It is suitable for situations where volunteer names and addresses need to be combined with data from other sources for mailings, such as fund appeals you make through outside mailing services.



The screenshot shows an Excel spreadsheet with the following columns: Last name, First name, Title, Street 1, Street 2, Street 3, City, State, and Zip. The data is as follows:

	A	B	C	D	E	F	G	H	I	J	K
1	Last name	First name	Title	Street 1	Street 2	Street 3	City	State	Zip		
2	Armstrong	Mary	Ms.	4985 Maloy Court			Cascade	MI	49546		
3	Baccus	Lydia	Mrs.	4632 Cherry Ridge Drive			Wyoming	MI	49509		
4	Bailey	Victor	Mr.	2401 Franklee Lane			Caledonia	MI	49316		
5	Bargas	Jessica	Mrs.	3299 Masonic Hill Road	Apt. 7		Ada	MI	49301		
6	Barker	Geraldine	Mrs.	2412 Werninger Street			Comstock Park	MI	49321		
7	Barnes	Merry		3200 Saint Clair Street			Grandville	MI	49418		
8	Barra	Cathy	Ms.	2563 Tree Top Lane			Wayland	MI	49348		
9	Becker	Anna	Ms.	1219 Adamsville Road			Cascade	MI	49546		
10	Beesley	Margaret	Mrs.	3293 Gerald L. Bates Drive			Grandville	MI	49418		
11	Blackmon	Mary		4293 Liberty Avenue			Caledonia	MI	49316		
12	Boston	Jennifer		1355 Augusta Park			Coopersville	MI	49404		
13	Braziel	Margaret		3050 Radford Street			Cutlerville	MI	49549		
14	Brooks	Aide	Ms.	1027 Marshall Street			Caledonia	MI	49316		
15	Brown	Hazel		3247 Glenwood Avenue			Hudsonville	MI	49426		
16	Burger	James	Mr.	1497 Crummit Lane			Grand Rapids	MI	49525		
17	Campbell	Andrea		2304 Burke Street			Jenison	MI	49418		
18	Campbell	Diane	Ms.	2739 Kelly Drive			Wyoming	MI	49509		
19	Carter	Kathryn		91 Ridenour Street			Wayland	MI	49348		
20	Castaneda	Deana	Ms.	3075 Martha Street			Comstock Park	MI	49321		
21	Christiansen	Margaret		1146 Despard Street			Cascade	MI	49546		
22	Cook	Chantel	Ms.	3869 Hart Ridge Road			Allendale	MI	49401		
23	Cook	Louise		217 Cameron Road			Dorr	MI	49323		
24	Coronado	Amy	Mrs.	4572 Spadafore Drive			Dorr	MI	49323		
25	Daniels	Penny		4275 Riverside Drive			Grand Rapids	MI	49525		
26	De Koster	Abigail	Mrs.	811 - 4Th Ave.	Apt. 1022		Grand Rapids	MI	49508		
27	Derosier	Gladys	Ms.	3139 Mount Tabor			Ada	MI	49301		
28	Dick	Gwendolyn		4981 Warner Street			Kentwood	MI	49508		

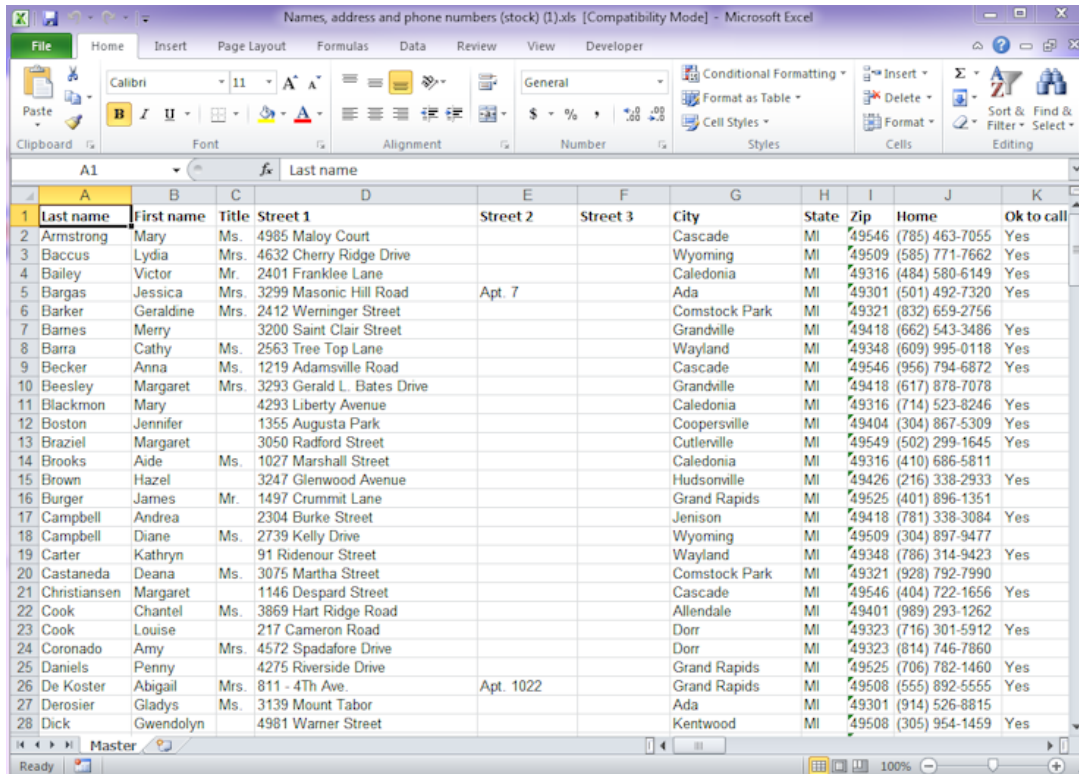


# Names, Addresses and Phone Numbers (stock)

Help topic 8038

Added or revised 12-05-2014

This report creates an [Excel spreadsheet \[pg:0513\]](#) file with columns for volunteer names, address, and phone numbers. It is useful for including volunteer information in external documents such as volunteer directories.



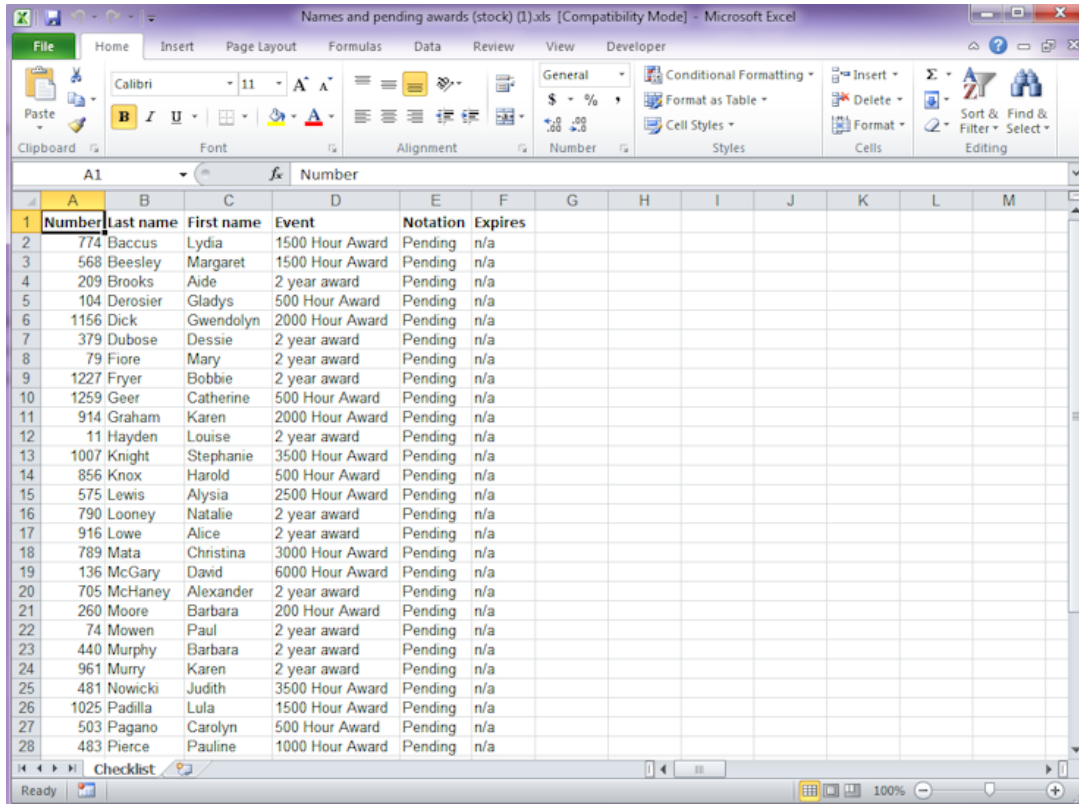
	A	B	C	D	E	F	G	H	I	J	K
1	Last name	First name	Title	Street 1	Street 2	Street 3	City	State	Zip	Home	Ok to call
2	Armstrong	Mary	Ms.	4985 Maloy Court			Cascade	MI	49546	(785) 463-7055	Yes
3	Baccus	Lydia	Mrs.	4632 Cherry Ridge Drive			Wyoming	MI	49509	(585) 771-7662	Yes
4	Bailey	Victor	Mr.	2401 Franklee Lane			Caledonia	MI	49316	(484) 580-6149	Yes
5	Bargas	Jessica	Mrs.	3299 Masonic Hill Road	Apt. 7		Ada	MI	49301	(501) 492-7320	Yes
6	Barker	Geraldine	Mrs.	2412 Werninger Street			Comstock Park	MI	49321	(832) 659-2756	
7	Barnes	Merry		3200 Saint Clair Street			Grandville	MI	49418	(662) 543-3486	Yes
8	Barra	Cathy	Ms.	2563 Tree Top Lane			Wayland	MI	49348	(609) 995-0118	Yes
9	Becker	Anna	Ms.	1219 Adamsville Road			Cascade	MI	49546	(956) 794-6872	Yes
10	Beesley	Margaret	Mrs.	3293 Gerald L. Bates Drive			Grandville	MI	49418	(617) 878-7078	
11	Blackmon	Mary		4293 Liberty Avenue			Caledonia	MI	49316	(714) 523-8246	Yes
12	Boston	Jennifer		1355 Augusta Park			Coopersville	MI	49404	(304) 867-5309	Yes
13	Braziel	Margaret		3050 Radford Street			Cutlerville	MI	49549	(502) 299-1645	Yes
14	Brooks	Aide	Ms.	1027 Marshall Street			Caledonia	MI	49316	(410) 686-5811	
15	Brown	Hazel		3247 Glenwood Avenue			Hudsonville	MI	49426	(216) 338-2933	Yes
16	Burger	James	Mr.	1497 Crummit Lane			Grand Rapids	MI	49525	(401) 896-1351	
17	Campbell	Andrea		2304 Burke Street			Jenison	MI	49418	(781) 338-3084	Yes
18	Campbell	Diane	Ms.	2739 Kelly Drive			Wyoming	MI	49509	(304) 897-9477	
19	Carter	Kathryn		91 Ridenour Street			Wayland	MI	49348	(786) 314-9423	Yes
20	Castaneda	Deana	Ms.	3075 Martha Street			Comstock Park	MI	49321	(928) 792-7990	
21	Christiansen	Margaret		1146 Despard Street			Cascade	MI	49546	(404) 722-1656	Yes
22	Cook	Chantel	Ms.	3869 Hart Ridge Road			Allendale	MI	49401	(989) 293-1262	
23	Cook	Louise		217 Cameron Road			Dorr	MI	49323	(716) 301-5912	Yes
24	Coronado	Amy	Mrs.	4572 Spadafore Drive			Dorr	MI	49323	(814) 746-7860	
25	Daniels	Penny		4275 Riverside Drive			Grand Rapids	MI	49525	(706) 782-1460	Yes
26	De Koster	Abigail	Mrs.	811 - 4Th Ave.	Apt. 1022		Grand Rapids	MI	49508	(555) 892-5555	Yes
27	Derosier	Gladys	Ms.	3139 Mount Tabor			Ada	MI	49301	(914) 526-8815	
28	Dick	Gwendolyn		4981 Warner Street			Kentwood	MI	49508	(305) 954-1459	Yes

# Names and Pending Awards (stock)

Help topic 8039

Added or revised 12-05-2014

This report creates an [Excel spreadsheet \[pg:0513\]](#) file with columns for volunteer names and their pending awards [\[pg:1551\]](#). It is useful for transferring volunteer award information to external documents for volunteer recognition events (such as booklets that show award recipients).



Number	Last name	First name	Event	Notation	Expires
774	Baccus	Lydia	1500 Hour Award	Pending	n/a
568	Beesley	Margaret	1500 Hour Award	Pending	n/a
209	Brooks	Aide	2 year award	Pending	n/a
104	Derosier	Gladys	500 Hour Award	Pending	n/a
1156	Dick	Gwendolyn	2000 Hour Award	Pending	n/a
379	Dubose	Dessie	2 year award	Pending	n/a
79	Fiore	Mary	2 year award	Pending	n/a
1227	Fryer	Bobbie	2 year award	Pending	n/a
1259	Geer	Catherine	500 Hour Award	Pending	n/a
914	Graham	Karen	2000 Hour Award	Pending	n/a
11	Hayden	Louise	2 year award	Pending	n/a
1007	Knight	Stephanie	3500 Hour Award	Pending	n/a
856	Knox	Harold	500 Hour Award	Pending	n/a
575	Lewis	Alysia	2500 Hour Award	Pending	n/a
790	Looney	Natalie	2 year award	Pending	n/a
916	Lowe	Alice	2 year award	Pending	n/a
789	Mata	Christina	3000 Hour Award	Pending	n/a
136	McGary	David	6000 Hour Award	Pending	n/a
705	McHaney	Alexander	2 year award	Pending	n/a
260	Moore	Barbara	200 Hour Award	Pending	n/a
74	Mowen	Paul	2 year award	Pending	n/a
440	Murphy	Barbara	2 year award	Pending	n/a
961	Murry	Karen	2 year award	Pending	n/a
481	Nowicki	Judith	3500 Hour Award	Pending	n/a
1025	Padilla	Lula	1500 Hour Award	Pending	n/a
503	Pagano	Carolyn	500 Hour Award	Pending	n/a
483	Pierce	Pauline	1000 Hour Award	Pending	n/a

# All Volunteer Information (stock)

Help topic 8040

Added or revised 10-07-2016

This [Excel spreadsheet \[pg:0513\]](#) report produces a spreadsheet that contains [all of the volunteer information \[pg:0510\]](#) in your database. This stock report is suitable for producing [external backup \[pg:0461\]](#) copies of your data for storage on your own computer.

	A	B	C	D	E	F	G	H	I	J	
	Last name, First name	First name Last name	Title First name Last name	Last name	First name	Middle name	Title	Nickname	Status	Type	Access
1	Last name, First name	First name Last name	Title First name Last name	Last name	First name	Middle name	Title	Nickname	Status	Type	Access
2	Armstrong, Mary	Mary Armstrong	Ms. Mary Armstrong	Armstrong	Mary	E	Ms.		Applicant	Adult	
3	Baccus, Lydia	Lydia Baccus	Mrs. Lydia Baccus	Baccus	Lydia	R	Mrs.	Lydi	Active	Adult	
4	Bailey, Victor	Victor Bailey	Mr. Victor Bailey	Bailey	Victor	R	Mr.	Vic	Applicant	Adult	
5	Bargas, Jessica	Jessica Bargas	Mrs. Jessica Bargas	Bargas	Jessica	R	Mrs.	Jessie	Applicant	Adult	
6	Barker, Geraldine	Geraldine Barker	Mrs. Geraldine Barker	Barker	Geraldine	D	Mrs.	Gerry	Active	Adult	
7	Barnes, Merry	Merry Barnes	Merry Barnes	Barnes	Merry	R			Active	Adult	
8	Barra, Cathy	Cathy Barra	Ms. Cathy Barra	Barra	Cathy	R	Ms.	Cat	Active	Adult	
9	Becker, Anna	Anna Becker	Ms. Anna Becker	Becker	Anna	M	Ms.		Active	College	
10	Beesley, Margaret	Margaret Beesley	Mrs. Margaret Beesley	Beesley	Margaret	M	Mrs.	Margie	Active	Adult	
11	Blackmon, Mary	Mary Blackmon	Mary Blackmon	Blackmon	Mary	L			Applicant	Adult	
12	Boston, Jennifer	Jennifer Boston	Jennifer Boston	Boston	Jennifer	E		Jenny	Active	Adult	
13	Braziel, Margaret	Margaret Braziel	Margaret Braziel	Braziel	Margaret	S			Applicant	Adult	
14	Brooks, Aide	Aide Brooks	Ms. Aide Brooks	Brooks	Aide	J	Ms.	Addy	Active	High School	
15	Brown, Hazel	Hazel Brown	Hazel Brown	Brown	Hazel	N			Active	Adult	
16	Burger, James	James Burger	Mr. James Burger	Burger	James	R	Mr.	Jim	Active	Adult	
17	Campbell, Andrea	Andrea Campbell	Andrea Campbell	Campbell	Andrea	E			Active	Adult	
18	Campbell, Diane	Diane Campbell	Ms. Diane Campbell	Campbell	Diane	C	Ms.	Dina	Active	High School	
19	Carter, Kathryn	Kathryn Carter	Kathryn Carter	Carter	Kathryn	K			Active	Adult	
20	Castaneda, Deana	Deana Castaneda	Ms. Deana Castaneda	Castaneda	Deana	H	Ms.		Active	Adult	
21	Christiansen, Margaret	Margaret Christiansen	Margaret Christiansen	Christiansen	Margaret	N			Applicant	Adult	
22	Cook, Chantel	Chantel Cook	Ms. Chantel Cook	Cook	Chantel	M	Ms.	Chaney	Inactive	Adult	
23	Cook, Louise	Louise Cook	Louise Cook	Cook	Louise	C			Applicant	Adult	
24	Coronado, Amy	Amy Coronado	Mrs. Amy Coronado	Coronado	Amy	E	Mrs.		Active	Adult	
25	Daniels, Penny	Penny Daniels	Penny Daniels	Daniels	Penny	T			Inactive	Adult	
26	De Koster, Abigail	Abigail De Koster	Mrs. Abigail De Koster	De Koster	Abigail		Mrs.	Abby	Applicant	Adult	
27	Derosier, Gladys	Gladys Derosier	Ms. Gladys Derosier	Derosier	Gladys	J	Ms.	Glad	Active	High School	
28	Dick, Gwendolyn	Gwendolyn Dick	Gwendolyn Dick	Dick	Gwendolyn	C			Active	Adult	

## Award Eligibility (stock)

Help topic 8041

Added or revised 12-22-2011

This report is sorted by award. It lists each award you track in Volgistics. For each award, it lists the volunteers who are currently eligible for with the award.

Use this report to prepare for volunteer recognition events in which you present awards.

Award Eligibility Sample Agency Name	
Award	Volunteer
100 Hour award	Kentley, David McMurphy, Ernie  Count: 2
500 hour award	Ballard, Elizabeth Bennegin, Keshia Edgerton, Giuseppina Green, Harriet Howard, Ernie  Count: 5
2000 Hour Award	Bailey, Harry Bailey, Mary Dakin, Ruth Decker, Elizabeth Garcia, Jackie Howard, Jim  Count: 6
1 Year Award	Nokes, George Van Doren Stern, Philip  Count: 2
5 Year Award	Bailey, Harry Bailey, Mary Ballard, Elizabeth Bennegin, Keshia Decker, Elizabeth Edgerton, Giuseppina Garcia, Jackie Green, Harriet Howard, Ernie Howard, Jim Stevens, Walt  Count: 11
Chamber Service Award	Blick, Violet Clark, Kevin Edgerton, Giuseppina Green, Harriet Howard, Ernie Howard, Jim Van Doren Stern, Philip  Count: 7

Printed 03-13-2008 11:16 am Page 1 A-Z

### Related help

## Presented Awards (stock)

Help topic 8042

Added or revised 12-22-2011

This report is sorted by award. It lists each award you track in Volgistics. For each award, it lists the volunteers who have already been presented with the award. This report is based on Award dates from the volunteer's History tab.

Presented Awards		Sample Agency Name
Award	Volunteer	
100 Hour award	Bailey, Harry Bailey, Mary Ballard, Elizabeth Bick, Violet Clark, Janice  Count: 5	
500 hour award	Bailey, Harry Henderson, Mary  Count: 2	
2000 Hour Award	Applebe, Tom Clark, Janice Clark, Kevin  Count: 3	
1 Year Award	Bick, Violet  Count: 1	
5 Year Award	Applebe, Tom Clark, Janice Clark, Kevin Dakin, Ruth McMurphy, Ernie  Count: 5	
Chamber Service Award	Applebe, Tom Bailey, Harry Bailey, Mary Ballard, Elizabeth Bennegin, Keshia Clark, Janice Dakin, Ruth Decker, Elizabeth Garcia, Jackie Henderson, Mary Kentley, David McMurphy, Ernie Nokes, George Stevens, Walt  Count: 14	

Printed 03-13-2006 11:19 am Page 1 A-Z

### Related help

# Monthly Schedules by Assignment (stock)

Help topic 8043

Added or revised 01-05-2012

Use this [stock \[pg:0595\]](#) report to create monthly schedules for each assignment. The report will list each assignment's schedule on a separate section of the report. Each cell will have the scheduled time, the volunteer or group scheduled and any note listed on the [opening \[pg:0776\]](#). Any unfilled openings will be shown with the word

## Open

in bold print. A contact list for the volunteers scheduled will appear after each assignment's schedule. The list will include the volunteer's name, [Type \[pg:0212\]](#), phone numbers and email address.

By default, the report is set-up to include the schedule information for

## Next month

for all active assignments. You can change this to cover a different month, and/or a specific Site, Place or Assignment, on the [Include \[pg:0538\]](#) page.

You can find information on how to print this report, or customize it to include different fields or time periods, in [Help Topic 2104 \[pg:0595\]](#).

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
<b>1</b>	<b>2</b> 7:00 a - 12:00 p Emergency Assistant Franklin, Alvin 12:15 p - 3:00 p Emergency Assistant <b>Open</b> 12:15 p - 3:00 p Emergency Assistant <b>Open</b> 5:00 p - 11:30 p Emergency Assistant Coolidge, Sarahlyn 5:00 p - 11:30 p Emergency Assistant <b>Open</b>	<b>3</b> 7:00 a - 12:00 p Emergency Assistant Nagleford, Fern 7:00 a - 12:00 p Emergency Assistant <b>Open</b> 1:00 p - 3:00 p Emergency Assistant Mandrake, Larry 12:15 p - 3:00 p Emergency Assistant Michelle, Limon 5:00 p - 11:30 p Emergency Assistant Alpin, Jerrold 5:00 p - 11:30 p Emergency Assistant Saxon, Lawrence 5:00 p - 11:30 p Emergency Assistant Vanbeek, Allison	<b>4</b> 7:00 a - 12:00 p Emergency Assistant Franklin, Alvin 7:00 a - 12:00 p Emergency Assistant Nagleford, Fern 12:15 p - 3:00 p Emergency Assistant <b>Open</b> 12:15 p - 3:00 p Emergency Assistant <b>Open</b> 5:00 p - 11:30 p Emergency Assistant Coolidge, Sarahlyn 5:00 p - 11:30 p Emergency Assistant <b>Open</b>	<b>5</b> 7:00 a - 12:00 p Emergency Assistant Bucholz Family 7:00 a - 12:00 p Emergency Assistant Franklin, Alvin 7:00 a - 12:00 p Emergency Assistant <b>Open</b> 1:00 p - 3:00 p Emergency Assistant Mandrake, Larry 12:15 p - 3:00 p Emergency Assistant Nagleford, Fern 5:00 p - 11:30 p Emergency Assistant Johnson, Catherine 5:00 p - 11:30 p Emergency Assistant <b>Open</b>	<b>6</b> 7:00 a - 12:00 p Emergency Assistant Franklin, Alvin 12:15 p - 3:00 p Emergency Assistant <b>Open</b> 5:00 p - 11:30 p Emergency Assistant Jones, Lamont 5:00 p - 11:30 p Emergency Assistant Vanbeek, Allison 5:00 p - 11:30 p Emergency Assistant <b>Open</b>	<b>7</b>
<b>8</b>	<b>9</b> 7:00 a - 12:00 p Emergency Assistant Franklin, Alvin 7:00 a - 12:00 p	<b>10</b> 7:00 a - 12:00 p Emergency Assistant Franklin, Alvin 7:00 a - 12:00 p	<b>11</b> 7:00 a - 12:00 p Emergency Assistant Franklin, Alvin 7:00 a - 12:00 p	<b>12</b> 7:00 a - 12:00 p Emergency Assistant Nagleford, Fern 7:00 a - 12:00 p	<b>13</b> 7:00 a - 12:00 p Emergency Assistant Franklin, Alvin 7:00 a - 12:00 p	<b>14</b>

Printed 12-19-2011 4:01 pm Page 1

Sunday (29th continued)	Monday (30th continued)	Tuesday (31st continued)	Wednesday	Thursday	Friday	Saturday
	Emergency Assistant Coolidge, Sarahlyn <b>5:00 p - 11:30 p</b> Emergency Assistant <b>Open</b> <b>5:00 p - 11:30 p</b> Emergency Assistant <b>Open</b>	Emergency Assistant Vanbeek, Allison <b>5:00 p - 11:30 p</b> Emergency Assistant Alpin, Jerrold <b>5:00 p - 11:30 p</b> Emergency Assistant Jones, Lamont <b>5:00 p - 11:30 p</b> Emergency Assistant Saxon, Lawrence				

**Scheduled Volunteers**

Name	Type	Phone	Email
Alpin, Jerrold	Adult	(616) 555-0987 (Cell)	AlpinCrest.blahoo.com
Bucholz Family	Group		bulcholz.tim@blahoo.com
Coolidge, Sarahlyn	Adult	(616) 555-3455 (Home) (616) 555-1113 (Work) (616) 555-2205 (Cell)	SCool@gaggle.com
Franklin, Alvin	Junior	(616) 555-1112 (Home) (616) 555-9229 (Cell)	franklin.alvin@blahoo.com
Johnson, Catherine	Adult	(616) 555-9391 (Home)	JohnsonC@alo.com
Jones, Lamont	Adult	(616) 876-9898 (Home)	lamont.jones@alo.com
Mandrake, Larry	Adult	(222) 393-0993 (Home) (214) 333-0009 (Cell)	drake.l@blahoo.com
Michelle, Limon	Adult		limon.michelle@abc.com
Nagleford, Fern	Adult	(616) 555-8767 (Home) (616) 555-4320 (Cell)	fem.n@abc.com
Saxon, Lawrence	Adult		saxon.larry@hatmail.com
Vanbeek, Allison	Junior	(616) 009-8843 (Home) 616-909-0098 (Work)	luckyAl@blahoo.com

**Related help**

## Weekly Schedules by Assignment (stock)

Help topic 8044

Added or revised 01-05-2012

Use this [stock \[pg:0595\]](#) report to create weekly schedules for each assignment. The report will list each assignment's schedule on a separate section of the report. Each cell will have the scheduled time, the volunteer or group scheduled and any note listed on the [opening \[pg:0776\]](#). Any unfilled openings will be shown with the word **Open** in bold print.

By default, the report is set-up to include the schedule information for

*Next week*

for all active assignments. You can change this to cover a different week, and/or a specific Site, Place or Assignment, on the [Include \[pg:0538\]](#) page.

You can find information on how to print this report, or customize it to include different fields or time periods, in [Help Topic 2104 \[pg:0595\]](#).

Great Lakes Community Hospital North Campus Pet Therapy Program			Volunteer Schedule Great Lakes Volunteers January 8, 2012 to January 14, 2012			
Sunday January 8, 2012	Monday January 9, 2012	Tuesday January 10, 2012	Wednesday January 11, 2012	Thursday January 12, 2012	Friday January 13, 2012	Saturday January 14, 2012
2:00 p - 4:00 p Barclay, Andrea Dog & Cat Volunteers	3:00 p - 5:00 p Lupin, George Cat Volunteers Only	9:30 a - 11:00 a Bartowski, Mary Sue Dog & Cat Volunteers	9:00 a - 10:00 a <b>Open</b> Dog Volunteers Only	9:30 a - 11:00 a Bartowski, Mary Sue Dog & Cat Volunteers	3:00 p - 5:00 p Decker, Marilyn Cat Volunteers Only	2:00 p - 4:00 p Fourth Avenue Youth Group Dog & Cat Volunteers
2:00 p - 4:00 p Blackport, Henry Dog & Cat Volunteers	3:00 p - 5:00 p Rivera, Renea Cat Volunteers Only	9:30 a - 11:00 a Zambrano, Alphonso Dog & Cat Volunteers	3:00 p - 5:00 p Fitzgerald, Larry Cat Volunteers Only	9:30 a - 11:00 a <b>Open</b> Dog & Cat Volunteers	3:00 p - 5:00 p <b>Open</b> Cat Volunteers Only	2:00 p - 4:00 p Fourth Avenue Youth Group Dog & Cat Volunteers
2:00 p - 4:00 p Johnson, Catherine Dog & Cat Volunteers	6:00 p - 8:15 p Alpin, Jerrold Dog Volunteers Only	3:00 p - 5:00 p Lupin, George Cat Volunteers Only	3:00 p - 5:00 p Rivera, Renea Cat Volunteers Only	3:00 p - 5:00 p Lupin, George Cat Volunteers Only	6:00 p - 8:15 p Tomlinson, Jessica Dog Volunteers Only	2:00 p - 4:00 p Tomlinson, Jessica Dog & Cat Volunteers
2:00 p - 4:00 p Vanbeek, Allison Dog & Cat Volunteers	6:00 p - 8:15 p Nagleford, Fern Dog Volunteers Only	3:00 p - 5:00 p Rivera, Renea Cat Volunteers Only	6:00 p - 8:15 p Nagleford, Fern Dog Volunteers Only	3:00 p - 5:00 p Rivera, Renea Cat Volunteers Only	6:00 p - 8:15 p <b>Open</b> Dog Volunteers Only	2:00 p - 4:00 p <b>Open</b> Dog & Cat Volunteers
		6:00 p - 8:15 p Alpin, Jerrold Dog Volunteers Only	6:00 p - 8:15 p <b>Open</b> Dog Volunteers Only	6:00 p - 8:15 p Nagleford, Fern Dog Volunteers Only		
		6:00 p - 8:15 p Nagleford, Fern Dog Volunteers Only		6:00 p - 8:15 p Tomlinson, Jessica Dog Volunteers Only		

Printed 12-22-2011 4:09 pm

Page 1

**Related help**



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## Monthly Schedules by Volunteer (stock)

Help topic 8045

Added or revised 02-14-2012

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Use this [stock \[pg:0595\]](#) report to create individual monthly schedules for each volunteer. The report will list volunteers alphabetically by last name and each volunteer's schedule will appear on a separate page of the report. The schedule will show a monthly calendar with the assignment names, scheduled times and any note listed on the [opening \[pg:0776\]](#) on each calendar date.

By default, the report is setup to include the schedule information for

*Next month*

for all volunteers. You can change this to cover a different month, and/or a selected volunteer or group of volunteers, on the [Include \[pg:0538\]](#) page.

You can find information on how to print this report, or customize it to include different fields or time periods, in [Help Topic 2104 \[pg:0595\]](#).

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1	2 8:00 a - 12:00 p Information Desk	3 6:00 p - 8:00 p Room Visitor	4 5:00 p - 7:00 p Information Desk	5	6 8:00 a - 12:00 p Information Desk	7 9:00 p - 11:00 p Parking Lot Watch
8	9 8:00 a - 12:00 p Information Desk	10	11	12	13 8:00 a - 12:00 p Information Desk	14 9:00 p - 11:00 p Parking Lot Watch
15	16 8:00 a - 12:00 p Information Desk	17 6:00 p - 8:00 p Room Visitor	18 5:00 p - 7:00 p Information Desk	19	20 8:00 a - 12:00 p Information Desk	21 9:00 p - 11:00 p Parking Lot Watch
22	23 8:00 a - 12:00 p Information Desk	24	25	26	27 8:00 a - 12:00 p Information Desk	28 9:00 p - 11:00 p Parking Lot Watch
29	30 8:00 a - 12:00 p Information Desk	31				

January 2012 Volunteer Schedule  
Great Lakes Volunteers

Vega, Melissa

Printed 12-20-2011 1:23 pm Page 1

### Related help

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## Weekly Schedules by Volunteer (stock)

Help topic 8046

Added or revised 01-03-2012

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Use this [stock \[pg:0595\]](#) report to create weekly schedules for each volunteer. The report will list volunteers alphabetically by last name and each volunteer's schedule will appear on a separate page of the report. The schedule will show the days of the week from Sunday through Saturday as column headings. Assignment names, the scheduled times and any note listed on the [opening \[pg:0776\]](#) will be listed in the appropriate column.

By default, the report is set-up to include the schedule information for

*Next week*

for all volunteers. You can change this to cover a different week, and/or a selected volunteer, or group of volunteers, on the [Include \[pg:0538\]](#) page.

You can find information on how to print this report, or customize it to include different fields or time periods, in [Help Topic 2104 \[pg:0595\]](#).

Mandrake, Larry		Volunteer Schedule				
		Great Lakes Volunteers				
		January 8, 2012 to January 14, 2012				
Sunday January 8, 2012	Monday January 9, 2012	Tuesday January 10, 2012	Wednesday January 11, 2012	Thursday January 12, 2012	Friday January 13, 2012	Saturday January 14, 2012
	8:00 a - 12:00 p Information Desk	1:00 p - 3:00 p Emergency Assistant		8:00 a - 12:00 p Information Desk		
				1:00 p - 3:00 p Emergency Assistant		

Printed 12-20-2011 2:37 pm Page 20

### Related help

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## Daily Sign-in Sheets (stock)

Help topic 8047

Added or revised 01-03-2012

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Use this [stock \[pg:0595\]](#) report to create sign-in sheets to record when volunteers serve. The report will list volunteers alphabetically by last name, the times and assignments they are scheduled for and any notes that are related to the [opening \[pg:0776\]](#). It also contains columns for volunteers or supervisors to record the *Time in* and *Time out* as well as an open column for *Office use*.

Volunteers can use the daily sign-in sheets to sign-in and out when they arrive and depart, and you can use them when you [post hours from the schedule \[pg:1576\]](#) to confirm each volunteer's service.

By default, the report is set-up to include the schedule information for Tomorrow for all volunteers. You can change this to cover a different day or date range, and/or a selected volunteer, or group of volunteers, on the [Include \[pg:0538\]](#) page.

You can find information on how to print this report, or customize it to include different fields or time periods, in [Help Topic 2104 \[pg:0595\]](#).

## Volunteer Sign-in Sheet

Great Lakes Volunteers  
December 20, 2011

Volunteer	From	To	Assignment	Notes	Time in	Time out	Office use
Albertson, Melissa	1:00 a	8:00 a	Bus Driver				
Alpin, Jerrold	5:00 p	11:30 p	Emergency Assistant				
Alpin, Susan	1:00 p	3:00 p	Bus Driver				
Alterman, Allison	7:00 a	9:00 a	Volunteer Greeter				
Barclay, Andrea	5:30 a	8:30 a	Parking Lot Clean-up				
Coolidge, Sarahlyn	12:15 p	3:00 p	Emergency Assistant				
Dalman, Malinda	7:00 a	12:45 p	Coordinator and Chairperson	Needs t-shirt			
Decker, Marilyn	2:00 p	5:00 p	Landscaping	Report to M. Wilson, Rm 392 A			
Fitzgerald, Larry	5:00 p	7:00 p	Recreation Leader				
Franklin, Alvin	7:00 a	12:00 p	Emergency Assistant				
Gillette, Sara Page	6:00 p	8:00 p	Room Visitor				
Good, Michelle	7:00 p	6:00 a	Parking Lot Watch				
Jeter, Susan	5:30 a	8:30 a	Parking Lot Clean-up				
Johnson, Catherine	7:00 a	12:00 p	Equipment Mover				
Jones, Lamont	5:00 p	11:30 p	Emergency Assistant				
Lynch, Wilma	2:00 p	5:00 p	Landscaping	Report to M. Wilson, Rm 392 A			
Lynch, Wilma	5:30 a	8:30 a	Parking Lot Clean-up				
Mandrake, Larry	1:00 p	3:00 p	Emergency Assistant				
McCord, Sarah	5:30 a	8:30 a	Parking Lot Clean-up				
Melvin, Leonard	5:30 a	8:30 a	Parking Lot Clean-up				
Michelle, Limon	12:15 p	3:00 p	Emergency Assistant				
Moore, Allison	5:00 p	7:00 p	Recreation Assistant				
Nagleford, Fern	7:00 a	12:00 p	Emergency Assistant				
Saxon, Lawrence	7:00 a	12:00 p	Emergency Assistant				
Simmons, Bernadette	5:00 p	7:00 p	Recreation Assistant				
Vanbeek, Allison	5:00 p	11:30 p	Emergency Assistant				
Vega, Melissa	6:00 p	8:00 p	Room Visitor				
Williams, Marva	7:00 a	12:45 p	Dish Washer				
Zambrano, Alphonso	2:00 p	5:00 p	Landscaping	Report to M. Wilson, Rm 392 A			

### Related help

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## Schedule Statistics (stock)

Help topic 8048

Added or revised 01-05-2012

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Use this [stock \[pg:0595\]](#) report to list schedule statistics for assignments in your account. The report lists the assignment name followed by statistics for un-filled openings, filled openings and an [unduplicated volunteer count \[pg:0452\]](#) for the volunteers scheduled.

By default, the report is set-up to include all active assignments and the time period of next month. You can change this to limit the report to just a selected Site, Place or Assignment and/or cover a different month on the [Include \[pg:0538\]](#) page.

You can find information on how to print this report, or customize it to include different fields or time periods, in [Help Topic 2104 \[pg:0595\]](#).

January 2012	Schedule Statistics Great Lakes Volunteers
<b>Recreation Assistant (Great Lakes Community Hospital/North Campus)</b>	
Un-filled openings: 0 Filled: 10 Number of different volunteers scheduled: 2	
<b>Recreation Leader (Great Lakes Community Hospital/North Campus)</b>	
Un-filled openings: 0 Filled: 18 Number of different volunteers scheduled: 1	
<b>Volunteer Greeter (Great Lakes Community Hospital/North Campus)</b>	
Un-filled openings: 4 Filled: 22 Number of different volunteers scheduled: 2	
<b>Emergency Assistant (Great Lakes Community Hospital/South Campus)</b>	
Un-filled openings: 22 Filled: 202 Number of different volunteers scheduled: 20	
<b>Information Desk (Great Lakes Community Hospital/South Campus)</b>	
Un-filled openings: 14 Filled: 44 Number of different volunteers scheduled: 6	
<b>Parking Lot Clean-up (Great Lakes Community Hospital/South Campus)</b>	
Un-filled openings: 2 Filled: 43 Number of different volunteers scheduled: 6	
<b>Parking Lot Watch (Great Lakes Community Hospital/South Campus)</b>	
Un-filled openings: 4 Filled: 38 Number of different volunteers scheduled: 3	
<b>Room Visitor (Great Lakes Community Hospital/South Campus)</b>	
Un-filled openings: 0 Filled: 11 Number of different volunteers scheduled: 3	

**Related help**

# Assignment Description Sheets (stock)


Help topic 8049

Added or revised 05-03-2013

Use this [stock \[pg:0595\]](#) report to generate Assignment description sheets for active Assignments. Finished reports have an Assignment Detail page(s) for each Assignment arranged alphabetically by the Assignment's name.

The Assignment Detail pages show contact information for the Assignment, fields setup in the Detail section of the Assignment tab, as well as fields from the Assignment's Profile and Description tabs. You can print out just the page(s) for one particular Assignment if you want to give new volunteers a hand-out with information about the Assignment they'll be serving in.

You can find information on how to print this report, or customize it to include different fields, in [Help Topic 2104 \[pg:0595\]](#).

 <b>CIMT Assistant</b> Assignment Description Sheets																																																																									
<p><b>Duties</b> Volunteers assist the medical staff in basic operations for the Constraint Induced Movement Therapy (CIMT) room. Responsibilities range from stocking rooms, ordering and checking in orders, and inventory control. More advanced volunteers may assist with patient care when appropriate. However, no medical knowledge required.</p> <p><b>Qualifications</b> The volunteer must have the ability to communicate courteously and effectively with patients, families, visitors and staff. Fluency in foreign languages and/or sign language is a plus, but is not required.</p> <p>The volunteer must conduct themselves in a responsible and caring manner at all times and maintain strict confidentiality.</p> <p>While no medical knowledge is required, it is a positive while serving in this position. Volunteers who are attending college, or receiving training in a medical specialty, are encouraged to serve in this capacity as this position provides an excellent reference for future employment.</p> <p>Commitment to at least one weekly 3 hour shift (Monday, Tuesday or Wednesday) is desired.</p> <p><b>Directions</b> Please see page 501 of the "Policy and Procedures" manual, or contact the assignment Coordinator, if you need additional assistance while on duty.</p> <p><b>Additional Requirements / Information</b> Accounting Category: SD2 CWR Level: 2 MSDS Location: Department Office</p> <p>Hour Value: \$12.80 Last MSDS Update: 01-17-2013</p> <p>Patient contact HIPAA Required</p> <p><b>Characteristics</b> <b>Skills &amp; Interests</b> Computer - Basic                      Patient Assistance Telephone Answering</p> <p><b>Languages</b> American Sign                      English Spanish</p>	<p><b>At a Glance</b></p> <p><b>Availability Needed:</b> Ongoing</p> <p><b>Volunteers Serve Up To:</b> 36 hours monthly</p> <p><b>Times Needed:</b></p> <table border="1"> <thead> <tr> <th></th> <th>6am - 8am</th> <th>8am - 10am</th> <th>10am - noon</th> <th>noon - 2pm</th> <th>2pm - 4pm</th> <th>4pm - 6pm</th> <th>6pm - 8pm</th> <th>8pm - 10pm</th> </tr> </thead> <tbody> <tr> <td>Sun</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Mon</td> <td>X</td> <td>X</td> <td>X</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Tue</td> <td>X</td> <td>X</td> <td>X</td> <td>X</td> <td>X</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Wed</td> <td>X</td> <td>X</td> <td>X</td> <td>X</td> <td>X</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Thu</td> <td>X</td> <td>X</td> <td>X</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Fri</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Sat</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table> <p><b>Minimum Age:</b> 18</p> <p><b>Address and Contact Info:</b> 456 Your Street Address Room 020 - Basement Level Your City, MI 49315</p> <p>(555) 555-5583 (Work) (555) 555-5530 (Fax) CIMTRoom@yourplace.org</p>		6am - 8am	8am - 10am	10am - noon	noon - 2pm	2pm - 4pm	4pm - 6pm	6pm - 8pm	8pm - 10pm	Sun									Mon	X	X	X						Tue	X	X	X	X	X				Wed	X	X	X	X	X				Thu	X	X	X						Fri									Sat								
	6am - 8am	8am - 10am	10am - noon	noon - 2pm	2pm - 4pm	4pm - 6pm	6pm - 8pm	8pm - 10pm																																																																	
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Printed 05-07-2013 9:34 am                      Page 1

## Related help

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## Assignment List (stock)

Help topic 8050

Added or revised 05-03-2013

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Use this [stock \[pg:0595\]](#) report to generate a list of active Assignments in your account. Finished reports have a Summary Page(s) that lists Sites alphabetically. Each Site's Assignments are listed alphabetically underneath it. The Place the Assignment falls under appears in brackets after the Assignment's name and any [Coordinators \[pg:0163\]](#) assigned to the Assignment are listed under each Assignment's name.

You can find information on how to print this report, or customize it to include different fields, in [Help Topic 2104 \[pg:0595\]](#).

Summary of Sites, Places, and Assignments Sorted by Site	
<b>Heart Center</b>	
• Cardiovascular Waiting Room [Heart Center]	Kathleen Banks
• Information Desk [Heart Center]	Felton Marcella
<b>Main Hospital</b>	
• Advisory Council [Administration]	Kevin Atkins
• Board Meeting [Administration]	Kevin Atkins
• Department Assistant [Administration]	Stephanie Saunders
• Patient Advocate [Administration]	Stephanie Saunders
• Special Projects [Administration]	Arlene Rogers
• Diabetes Clinic Office Assistant [Community Education]	Stephanie Saunders
• Orientation [Community Education]	Arnold Cabrera
• Workshops [Community Education]	Arnold Cabrera
• Emergency Department [Emergency Department]	Stephanie Saunders
• Gift Shop Helper [Gift Shop]	Stephanie Saunders
• Gift Shop Manager [Gift Shop]	Stephanie Saunders
• North Lobby Desk [Info Desk]	Felton Marcella
• Skywalk Desk [Info Desk]	Felton Marcella
• Tour Guides [Info Desk]	Philip Cole
• Welcome Center Desk [Info Desk]	Felton Marcella
• Mail Delivery [Mail Room]	Marvin Johnston
• Greeters [Patient Escorts]	Arnold Cabrera
	Georgette Lopez
	Stephanie Saunders
• No One Dies Alone [Patient Escorts]	Georgette Lopez
• Stroke Peer Visitor [Patient Escorts]	Stephanie Saunders
• Floor 3 Reception Desk [Reception]	Felton Marcella
	Sheila Robinson
• Floor 4 Reception Desk [Reception]	Felton Marcella
	Sheila Robinson
• Laboratory Services Reception Desk [Reception]	Felton Marcella
• CIMT Assistant [Rehabilitation]	

### Related help



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# Coordinator Contact List (stock)


Help topic 8051

Added or revised 05-03-2013

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Use this [stock \[pg:0595\]](#) report to generate lists of [Coordinators \[pg:0163\]](#) assigned to each Assignment. Finished reports have a Summary Page(s) showing a list of active Assignments and Coordinators organized by Site. There are also Assignment Detail Pages for each Assignment showing basic contact information for the Assignment along with a list of Coordinators assigned to the Assignment and their contact information.

You can find information on how to print this report, or customize it to include different fields, in [Help Topic 2104 \[pg:0595\]](#).

		<b>Greeters</b> Coordinator Contact List	
<b>Coordinators for this Assignment</b>		<b>At a Glance</b>	
<ul style="list-style-type: none"><li>• Mr. Arnold Cabrera 1153 Robinson Court Ashley MI 48806 Email: arnoldcabrera@mailinator.com Work: (989) 320-8811 Cell: (989) 400-9845 Pager: (873) 229-3331</li><li>• Ms. Georgette Lopez 3957 Bartlett Avenue P.O. Box 3880 Detroit MI 48226 Email: georgette.lopez@spambob.com Cell: (248) 506-6087 Pager: (592) 389-1105</li><li>• Ms. Stephanie Saunders 2369 Shingleton Road Colon MI 49040 Email: stevensaunders@trashymail.com Cell: (269) 432-4377</li></ul>		<b>Site / Place:</b> Main Hospital / Patient Escorts <b>Address and Contact Info:</b> 456 Your Street Address Report to Welcome Center Your City, MI 49315  (555) 555-5555 (Work) (555) 555-5558 (Fax)	
Printed 05-07-2013 9:50 am		Page 19	

## Related help

# All Service by Assignment-Calendar Yr (stock)

Help topic 8052

Added or revised 05-17-2016

This **stock report** [pg:0595] summarizes volunteer service by calendar year. By default, it starts with the earliest calendar year that service is recorded in your database and continues through the current calendar year. You can change this setting on the **Include tab** [pg:0571] when you run the report.

The report will have sub-totals for each assignment whether it is active or **inactive** [pg:0140]. If you want to modify the report to just include active, or inactive, assignments, you can also do this on the **Include tab** when you run the report.

If you **organize your assignments** [pg:0096] by Sites and Places, the report will also include a sub-total for each Place and Site. There will be a grand total for each calendar year at the end of the report, and a grand total for each assignment (as well as for each Site and Place if you use them) in the rightmost column.

All Service By Assignment-Calendar Yr.							
Your Agency Name							
Site	Place	Assignment	2012 Hours	2013 Hours	2014 Hours	Total Hours	
Heart Center	Heart Center	Cardiovascular Waiting Room	1,501:00	1,620:00	1,580:00	4,701:00	
		Information Desk	1,814:18	1,924:00	1,884:00	5,622:18	
		<b>Total</b>	3,315:18	3,544:00	3,464:00	10,323:18	
<b>Total</b>			3,315:18	3,544:00	3,464:00	10,323:18	
Main Hospital	Administration	Advisory Council	134:00	192:00	192:00	518:00	
		Board Meeting	242:00	466:00	470:00	1,178:00	
		Department Assistant	1,556:30	1,832:00	1,784:00	5,172:30	
		Patient Advocate	2,348:47	2,304:30	2,240:30	6,893:47	
		Special Projects	591:00	371:00	6:35	968:35	
		<b>Total</b>	4,872:17	5,165:30	4,693:05	14,730:52	
		Community Education	Diabetes Clinic Office Assistant	872:00	1,942:00	2,192:00	5,006:00
			Orientation	157:00	29:30	0:00	186:30
			Workshops	339:00	501:00	495:00	1,335:00
		<b>Total</b>		1,368:00	2,472:30	2,687:00	6,527:30
		Emergency Department	Emergency Department	4,381:12	6,112:00	5,968:00	16,461:12
	<b>Total</b>		4,381:12	6,112:00	5,968:00	16,461:12	
	Gift Shop	Gift Shop Helper	1,385:00	3,167:00	3,090:00	7,642:00	
		Gift Shop Manager	1,297:30	3,227:00	3,152:30	7,677:00	

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Site	Place	Assignment	2012 Hours	2013 Hours	2014 Hours	Total Hours
		Total	1,691:13	2,551:00	2,502:00	6,744:13
	Spiritual Care	Clergy	246:11	1,206:00	1,191:00	2,643:11
		Spiritual Care Office Assistant	554:34	836:00	804:00	2,194:34
		Total	800:45	2,042:00	1,995:00	4,837:45
	Surgery	Joint Replacement Center Aide	468:31	500:00	484:00	1,452:31
		PACU Aide	288:00	1,221:30	1,180:00	2,689:30
		Surgery Waiting Room	875:04	568:00	400:00	1,843:04
		Total	1,631:35	2,289:30	2,064:00	5,985:05
Total			31,090:02	42,925:59	41,494:05	115,510:06
(None)	(None)	(None)	37:19	0:00	0:00	37:19
		Total	37:19	0:00	0:00	37:19
Total			37:19	0:00	0:00	37:19
<b>Grand total</b>			<b>34,442:39</b>	<b>46,469:59</b>	<b>44,958:05</b>	<b>125,870:43</b>

Use this report for year-to-year historical or comparison purposes, or if you need to report all service ever performed. If you do not exclude any volunteers from this report in the [Include \[pg:0571\]](#) criteria, and the time period the report covers includes every calendar year you've had your account, the sum where the *Grand total* row and the *Total Hours* column meet will represent all service entered in your database.

If you'd rather see service information organized by [fiscal year \[pg:0062\]](#), you can run the [All Service by Assignment-Fiscal Yr \(stock\) \[pg:0620\]](#) report instead. In addition, you can also customize [Service summary \[pg:0580\]](#) reports to

- Show each volunteer's individual service under each assignment
- Show [unduplicated volunteer counts \[pg:0452\]](#)
- Show [Service Measures \[pg:1557\]](#) you track other than volunteer hours
- Show the [value \[pg:0034\]](#) for any service you track
- Show [FTE \[pg:1563\]](#) comparisons for hours
- Show [prior year comparisons \[pg:0575\]](#)

To change the settings on a stock report, click the **Clone it** button after you select the name of the report from the Print menu. This will spin off a copy of the stock report that can be modified.

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## Volunteer Name Tags (stock)

Help topic 8054

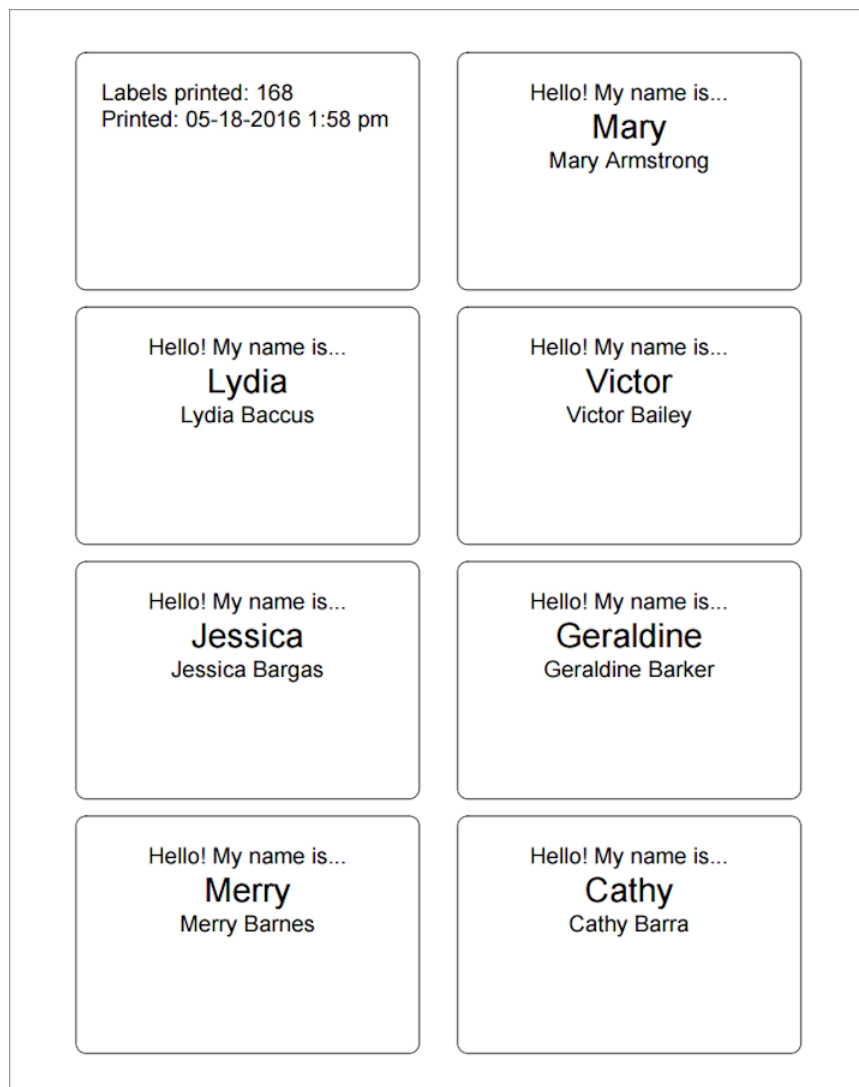
Added or revised 05-18-2016

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This [stock \[pg:0595\]](#) report creates name tags for your [volunteer \[pg:1849\]](#) records. The report is generated in [PDF \[pg:0449\]](#) format and uses the Avery 5395 format by default. This allows you to print the name tags on an ink jet or laser printer by using sheet fed name tag templates.

When you run the report, you can select to include all volunteers, or just certain volunteers based on things such as the volunteer's [Status \[pg:1832\]](#), [Type, Flag \[pg:0212\]](#), and more. This is controlled by the [Include tab \[pg:0528\]](#) settings you select when the report is run.

If you need your name tags to have different font sizes or styles, margins, volunteer name fields, or a new greeting message, you can spin off a copy of the stock report to modify. You can also select to add information about the volunteer's [assignments \[pg:0103\]](#), pending [awards \[pg:1551\]](#), or [service \[pg:1581\]](#). To do this, click the **Clone it** button after you select the name of the report from the Print menu.





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## Coordinator Name Tags (stock)

Help topic 8055

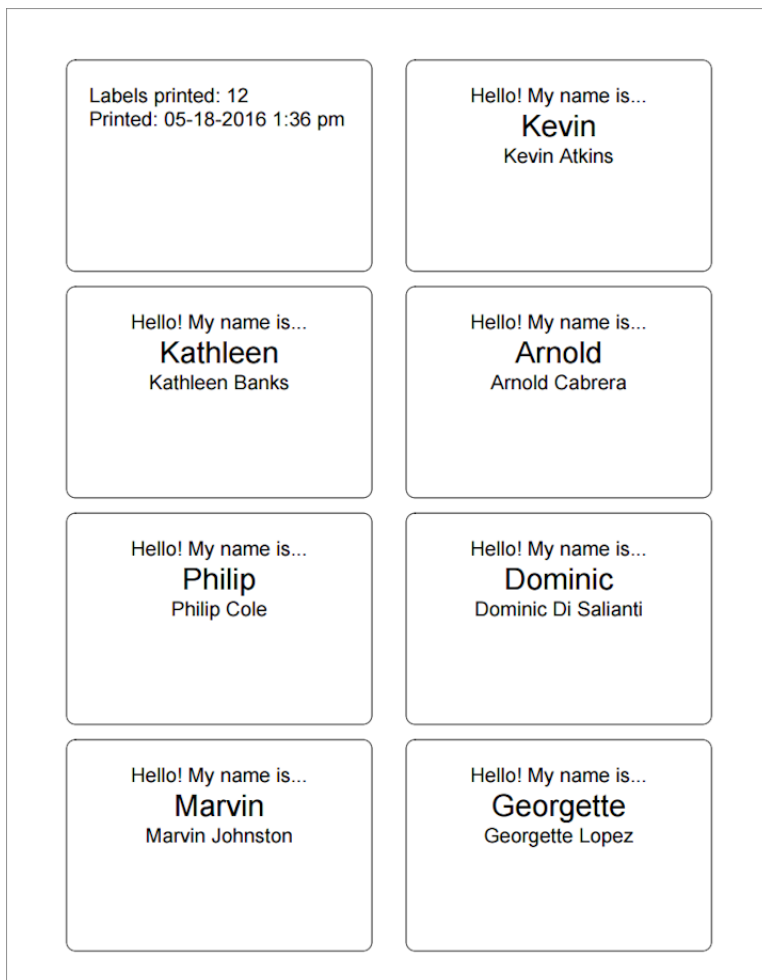
Added or revised 05-18-2016

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This [stock \[pg:0595\]](#) report creates name tags for your [Coordinator \[pg:0163\]](#) records. The report is generated in [PDF \[pg:0449\]](#) format and uses the Avery 5395 format by default. This allows you to print the name tags on an ink jet or laser printer by using sheet fed name tag templates.

When you run the report, you can select to include all Coordinators, or just Coordinators who oversee certain [assignments \[pg:0096\]](#). This is controlled by the [Include tab \[pg:0528\]](#) settings you select when the report is run.

If you need your name tags to have different font sizes or styles, margins, Coordinator name fields, or a new greeting message, you can spin off a copy of the stock report to modify. To do this, click the **Clone it** button after you select the name of the report from the Print menu.



# Status Statistics (stock)

Help topic 8056

Added or revised 05-13-2016

Use this [stock \[pg:0595\]](#) report for statistical information about your account's [Statuses \[pg:1832\]](#). The report shows each Status in your account and a count for the number of volunteer records with that Status on the last day of the month. By default this is the previous month, but this can be changed to a different month (or months) when the report is run.

The report also has a *Became* section that shows the count for the number of volunteers who were given each Status anytime during the month(s) the report covers. Please note that a volunteer may be in this section more than once. For example, if the report covers April 2016, a volunteer who has an Applicant Status date of April 4, 2016, and an Active Status date of April 22, 2016 will count in both the *Became Applicant* and *Became Active* totals.

Finally, the report has an *Average time in Status* section. This section shows the average amount of time volunteers stay in each Status. This is shown in years/days format. In the example below, you can see that the average time volunteers in the account have the Active Status is 5 years and 353 days. So for ease of use, you may wish to round this up to 6 years.

Status Statistics	
Your Agency Name	
Statistic	Apr 2016
Total count	222
Inactive count	4
Active count	199
LOA count	3
Applicant count	14
Prospect count	2
Became Inactive	1
Became Active	6
Became LOA	0
Became Applicant	6
Became Prospect	2
<b>Average time in status</b>	
Inactive (years/days)	4/305
Active (years/days)	5/353
LOA (years/days)	1/339
Applicant (years/days)	0/199
Prospect (years/days)	0/22

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By default, the report only contains statistics for [non-archived \[pg:0709\]](#) volunteer records. If you want the report to contain statistics for archived volunteers, you will need to clone the report and change the [Options tab \[pg:0585\]](#) settings so it includes archived records.

The default time period this report covers is the previous month. So if the report is run in May 2016, the report's statistics will be for April 2016. You can change this setting on the [Include tab \[pg:0589\]](#) when you run the report.

Please keep in mind that the reports only cover volunteers who have a record in your database during the time period the report covers. For example, if you run the report for April 2016, volunteers added in May 2016 will not be included in the report's results even though they have a record in your account at the time the report was run..

You can find information on how to print this report, or customize it to include different fields or time periods, in [Help Topic 2104 \[pg:0595\]](#).



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## Volunteer Age Statistics (stock)

Help topic 8057

Added or revised 05-16-2016

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Use this [stock \[pg:0595\]](#) report for statistical information about the [age \[pg:1861\]](#) composition of your volunteer population. This report breaks down your volunteers according to how many are in pre-set age categories. By default, these categories are birth to 10, 11 to 15, 16 to 18, 19 to 20, 21 to 30, 31 to 50, 51 to 65, and 66 and older. If you want the report to use different age categories, you will need to clone the report and change the [Fields tab \[pg:0585\]](#) settings. This report also provides information on the ages of the youngest and oldest volunteers, plus the average age of the volunteers in your account.

Volunteer Age Statistics	
Your Agency Name	
Statistic	Apr 2016
Total count	160
<b>Ages</b>	
Birth to 10	0
Ages 11 - 15	1
Ages 16 - 18	3
Ages 19 - 20	9
Ages 21 - 30	35
Ages 31 - 50	47
Ages 51 - 65	19
Ages 66 and over	45
Age unknown	1
Youngest	15
Oldest	89
Average age	48

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The report does not include age information for [group records \[pg:1909\]](#) by default. However, you can change the settings on the [Include tab \[pg:0589\]](#) when you run the report if you'd like group records to be included. Also, the report only contains statistics for [non-archived \[pg:0709\]](#) volunteer records. If you want the report to contain statistics for archived volunteers, you will need to clone the report and change the [Options tab \[pg:0585\]](#) settings so it includes archived records.

The default time period this report covers is the previous month. So if the report is run in May 2016, the report's statistics will be for April 2016. You can change this setting on the [Include tab \[pg:0589\]](#) when you run the report.

Please keep in mind that the reports only cover volunteers who have a record in your database during the time period the report covers. For example, if you run the report for April 2016, volunteers added in May 2016 will not be included in the report's results even though they have a record in your account at the time the report was run.


You can find information on how to print this report, or customize it to include different fields or time periods, in [Help Topic 2104 \[pg:0595\]](#).

# Volunteer Profile-Individual (stock)

Help topic 8058

Added or revised 05-23-2016

Use this report if you need to have a print-out or electronic file with basic information about your individual volunteers. The reports include volunteer photos [pg:1798] if the record has one uploaded. Because of this, the reports are only available in PDF [pg:0449] format. You can select which volunteers you would like to have on the report from the **Include tab** [pg:0699].

Volunteer Profile-Individual	
Your Agency Name Lydia Baccus	
	Baccus, Lydia 4632 Cherry Ridge Drive Wyoming, MI 49509 (585) 771-7662 (Home) (213) 321-3439 (Cell)
<b>Name</b>	Number: 774 Type: Adult
<b>Address</b>	Email: lydiarbaccus@mailinator.com
<b>Flags</b> Approved Driver First Aid Certified Policy Review Committee	CPR Certified Former Employee
<b>Personal</b> Birthday: 2/18 Age: 74 T-Shirt Size: 02 S Ethnicity: White/Caucasian Gender: Female	Parking Pass Number: 838925 School: Davenport University
<b>Message Preferences</b> Checklist reminders (email) Information Request (email) Volunteer News (email)	Electronic newsletters (email) Schedule reminders (email)
<b>Daily Availability</b> Sunday Monday Tuesday Wednesday Thursday Friday Saturday Afternoon Morning Morning Morning Evening Afternoon Evening	
<b>Availability</b> My availability is: Ongoing, except between these dates I would like to serve up to: 4	From: 06-19-2016 to: 07-10-2016 hours: Daily
<b>Skills &amp; Interests</b> Computer - Basic Patient Assistance	
<b>Languages</b> American Sign	

Printed 05-20-2016 4:00 pm Page 1 Lydia Baccus

<b>Assignments</b>	
Assignment	Role
Laboratory Services Reception Desk	Assigned
Orientation	Former

<b>Checklist</b>	
3-Month Evaluation (complete)	
Annual Competency Evaluation (pending)	
Assigned (complete)	
Background Check (complete)	
Confidentiality Form (complete)	
ERTK (complete)	
HIPAA (complete)	
Interview (complete)	
MMR (complete)	
Orientation Quiz (complete)	

<b>Dates</b>	
Start date: 08-08-2012	Date entered: 10-04-2012

<b>Emergency contact</b>	
Baccus, Arnold	
	Kind: Emergency contact
	Relationship: Spouse
Street 1: 1153 Robinson Court	Cell: (989) 400-9845
City: Ashley	
State: MI Zip: 48806	

<b>Emergency contact</b>	
Baccus, Judith	
	Kind: Emergency contact
	Relationship: Daughter
Street 1: 1734 Twin Oaks Drive	Home: (585) 771-7662
City: Grand Rapids	Cell: (231) 519-8719
State: MI Zip: 49546	

If you need your report to include different fields, or you want to make other changes to it, you can spin off a copy of the stock report to modify. To do this, click the **Clone it** button after you select the name of the report from the Print menu.

You can find more information on how to print this report, and make customizations, in [help topic 2104 \[pg:0595\]](#)

# Volunteer Profile-Group (stock)

Help topic 8059

Added or revised 05-23-2016

Use this report if you need to have a print-out or electronic file with basic information about your [group \[pg:1909\]](#) volunteers. Volunteer profile reports are only available in [PDF \[pg:0449\]](#) format. You can select which group records you would like to have on the report from the [Include tab \[pg:0699\]](#).

Volunteer Profile-Group	
Karen Graham	
Graham, Karen 390 Wildrose Lane Suite 10-B Byron Center, MI 49315	(313) 772-1411 (Home) (214) 988-9222 (Cell)
<b>Name</b>	Number: 914 Type: Group Kind: Group
<b>Group</b>	Group name: Boukamp, Graham & Schindel, PC Members: 7 Participation: The same volunteers each time
<b>Address</b>	Email: karenmgram@bgspc.com
<b>Flags</b>	Corporate Volunteer Hour Matching OK to Schedule with Other Groups Green Team
<b>Message Preferences</b>	Checklist reminders (email) Information Request (email) Volunteer News (email) Electronic newsletters (email) Schedule reminders (email)
<b>Daily Availability</b>	Sunday Evening Monday Tuesday Wednesday Thursday Evening Friday Afternoon Saturday Morning Afternoon Evening
<b>Availability</b>	My availability is: Ongoing, except between these dates I would like to serve up to: 6 From: 08-07-2016 to: 08-13-2016 hours: Daily
<b>Assignments</b>	Assignment Role Patient Advocate Former Special Projects Assigned Food Drive Packagers Assigned Orientation Former
<b>Checklist</b>	Assigned (complete) Background Check (complete) Confidentiality Form (complete) ERTK (complete) HIPAA (complete)
<b>Dates</b>	Start date: 05-19-2010 Date entered: 10-04-2012

Printed 05-20-2016 4:29 pm Page 1 Karen Graham

<p><b>Secondary Group Contact</b> Boukamp, Lawrence</p> <p>Street 1: 390 Wildrose Lane City: Byron Center State: MI Zip: 49315</p>	<p>Kind: Secondary Group Contact Relationship: Co-worker</p> <p>Home: (313) 772-1455 Cell: (214) 988-9198</p>
<p><b>Secondary Group Contact</b> Schindel, Victoria</p> <p>Street 1: 390 Wildrose Lane City: Byron Center State: MI Zip: 49315</p>	<p>Kind: Secondary Group Contact Relationship: Co-worker</p> <p>Home: (313) 772-0549 Cell: (214) 988-7620</p>
<p><b>Secondary Group Contact</b> Sanchez, Frank</p> <p>Street 1: 390 Wildrose Lane City: Byron Center State: MI Zip: 49315</p>	<p>Kind: Secondary Group Contact Relationship: Co-worker</p> <p>Cell: (313) 415-2666</p>

If you need your report to include different fields, or you want to make other changes to it, you can spin off a copy of the stock report to modify. To do this, click the **Clone it** button after you select the name of the report from the Print menu.

You can find more information on how to print this report, and make customizations, in [help topic 2104 \[pg:0595\]](#)

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## Options (Volunteer List Reports)

Help topic 1066

Added or revised 03-20-2013

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The

### *Options*

page appears when you create a new report or modify an existing report. Use the controls on this Options page to customize the structure of a [Volunteer List \[pg:0692\]](#) report.

#### **Sort by:**

Choose to sort volunteers in your Volunteer List report by one of the following options:

#### Volunteer name

Choose this option to sort volunteer information alphabetically by volunteer name.

#### Volunteer number

Choose this option to sort volunteer information by (ascending) volunteer number.

#### Birthday

Choose this option to sort volunteer information by the birthday stored in the "Date of birth" field on the Profile tab in the volunteer record.

#### Type

Choose this option to sort volunteer information by volunteer Type, for instance, grouping all "Adult" volunteers together and all "Junior" volunteers together in the Volunteer List report.

#### Life Hours

Choose this option to sort volunteer information by the volunteers' total number of recorded hours.

#### YTD Hours

Choose this option to sort volunteer information by the year-to-date hours, or the number of hours recorded thus far in the [fiscal year \[pg:0062\]](#) set for the account.

#### MTD Hours

Choose this option to sort volunteer information by the month-to-date service totals, or the number of hours recorded thus far in the *current* month.

#### Years of service

Choose this option to sort volunteer information by the number of years (and months) the volunteer's status has been any of the statuses checked in the 'Years of Service' section of the [Statistics setup page \[pg:1387\]](#). For example, if only the 'Active' status is checked on the Statistics setup page, volunteer years of service will include just the number of years the volunteer has been active.

#### Date entered

Choose this option to sort volunteer information by the date volunteer records were initially added to the system.

#### Start date

Choose this option to sort volunteer information by the volunteers' [start date \[pg:1890\]](#). By default, a volunteer's start date is the date they first became an 'Active' volunteer; however, this setting can be changed. If a system operator has [reconfigured the start date setting \[pg:1839\]](#) so that it is based on a status date other than the first "Active" status date, choosing this option will sort the report by whichever Status date the start date is based on.

#### Date of last activity

Choose this option to sort volunteer information by the volunteers' [date of last activity \[pg:0076\]](#), or the latest date for which they have service recorded.

#### *Start a new page for each volunteer*

Mark this option to begin a separate page for each individual volunteer included in the Volunteer List report.

#### *Blank row after each volunteer*

Choose this option to increase the white space in the report by including a blank row after each volunteer.

#### *Print totals for numeric fields*

If numeric fields are included in the volunteer list report, mark this option to include the totals for applicable numeric fields.

#### *Include a volunteer count*

Mark this option to display the number of volunteers in the list report in a volunteer count below the final row of your report.

When you're finished choosing the Options for your report, click **Next** to continue to the next step.

#### **Related help**

[Help Topic 2223 \[pg:0467\]](#) - Creating custom reports

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## **Fields (Volunteer List Reports)**

Help topic 1080

Added or revised 03-20-2013

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The

#### *Fields*

page appears when you create a new report or modify an existing report. Use the Fields page to choose the fields you want to appear on this [Volunteer List \[pg:0692\]](#) report.

Mark the boxes next to each field you want to appear on the Volunteer List report for each volunteer. Your report will include a column for each item you select. For example, if an organization needed to see only the names of volunteers included in the report, the system operator creating the report would mark only the boxes for name fields. If, however, an organization also wanted to see all of the information stored on each volunteer's Profile tab, they would additionally mark each of the field boxes in the Profile tab section on the report's Fields page.

Since each field becomes a report column, fields should be chosen sparingly. If more columns than can fit legibly from left to right on a page are included, Volgistics automatically extends the report to additional pages *right* before starting the next page *down*.

When you're finished choosing the Fields for your report, click **Next** to continue to the next step.

#### **Related help**

[Help Topic 2223 \[pg:0467\]](#) - Creating custom reports



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## Include (Volunteer List Reports)

Help topic 1086

Added or revised 10-02-2014

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The

*Include*

page appears when you create a new report or modify an existing Volunteer list report. Use the options on the Include page to choose which volunteers you want to *include* in this [Volunteer List \[pg:0692\]](#) report. You can also choose the report's file format (PDF or Excel) on this page.

### What format do you want for this report?

You can choose to create this report as either an Adobe PDF file, or as an Excel spread sheet file. Use this control to make this choice.

Choose "PDF" if you would like your report returned to you as an Adobe 'portable document' file. You can use Adobe reader to view and print your report.

Choose "Excel" if you would like your report returned to you as an Excel spread sheet file. You can use Microsoft Excel (or other spread sheet programs) to view and print the report.

### Which volunteers do you want to include in this report?

Choose which volunteers you want to appear on this report.

#### Tagged volunteers

This checkbox is disabled unless you previously [tagged \[pg:1529\]](#) one or more volunteer records. Check this checkbox if you want the report to include the tagged volunteers.

#### These volunteers:

Check this checkbox if you want the report to include **all** volunteers, or just the volunteers you specify using the following controls: (uncheck this checkbox only if you selected the *Tagged volunteers* checkbox and you want this report to include *only* the tagged volunteers).

#### Status

Choose *Any* if you want this report to include volunteers regardless of what their **current** status is.

Choose *Any of these* if you want this report to include volunteers whose **current** status is one of those you check, then check the statuses you want to include.

#### Type

Choose *Any* if you want this report to include volunteers regardless of what their Type is.

Choose *Any of these* if you want this report to include only volunteers whose Type is one of those you check, then check the Types you want to include.

The Type field appears in the Name box on the [Core tab \[pg:1868\]](#), and it is typically used for classifying volunteers by major program type, such as 'adult,' 'junior,' 'student,' 'regular,' 'occasional,' 'auxiliary,' and so forth.

### Kind

The Kind field is located on the Core tab in each volunteer record. It is used to show if a volunteer record is for an individual person or a [group \[pg:1909\]](#) that volunteers.

Select *Both individuals and groups* if you want the report to include both individuals and groups.

Select *Individuals only* if you want the report to only include individual volunteer records.

Select *Groups only* if you want the report to only include group volunteer records.

### Flag

Choose *Any* if you want this report to include volunteers regardless of what Flags appear on their Core tab.

Choose *Any of these* if you want this report to include only volunteers who have at least one of the Flags you check, then check the Flags you want to include.

Flags appear in the Flag box on the [Core tab \[pg:1868\]](#) for each volunteer. Flags are typically used to classify volunteers into different overlapping groups, such as 'board of directors,' 'donor,' 'sponsor,' 'day of caring,' 'red team,' and so forth.

### Site

This option appears if you use [Site Level Access \[pg:0092\]](#) in Volgistics, and you have access to the volunteer records for all Sites in your organization.

Choose *Any* if you want this report to include volunteers regardless of which Sites they serve at.

Choose *Any of these* if you want this report to include only volunteers who serve at at least one of the Sites you check, then check Sites you want to include.

### Set

Check this option, and then select a [Set \[pg:0858\]](#) if you want this report to include only the volunteers in a certain Set.

When you're finished choosing the Include options for your report click **Next** to continue to the next step.

### **Related help**

[Help Topic 2223 \[pg:0467\]](#) - Creating custom reports

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## Page Design (Volunteer List Reports)

Help topic 1123

Added or revised 03-20-2013

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The Page Design page appears when you create a new report or modify an existing report. Use the options on the Page Design page to customize the page formatting for your Volunteer List report.

### Page size

Use the drop down list to choose the paper or envelope size for this report. The default page size is "Letter."

### Margin width

Enter the size (in inches) of the margin you want to appear around the edge of the page. The default margin width is one half inch (0.5 inches).

### Page orientation

Choose the way you would like the pages of the report to be oriented, portrait or landscape.

### Fit to page

When you check *Fit to page* Volgistics will attempt to fit all of your report onto a single page across. Reports will still extend to additional pages if Volgistics cannot fit all of the report content onto a single page using the smallest legible font.

### First title line

Second title line

Type what you want to appear for the report title. Report titles may be two lines long.

The report title appears at the top of the first page, and at the top of subsequent pages if the report supports page breaks and you selected page breaks for the report.

### Add Site name

Check this checkbox if you want the Site name to appear as part of the report title when a [Site Level Operator \[pg:1442\]](#) prints a shared report. A shared report is a stock report, or a report created by the headquarters Site for use by all Sites. When you check this box, report titles will include the name of the Site where the report was printed whenever the report is printed by a Site Level Operator. Do not check this box if you do not want shared reports which are printed by Site Level Operators to include the Site name.

This option only appears if you use the [Site Level Access \[pg:0092\]](#) features.

### Add Set name

If you [print this report for different Sets \[pg:0863\]](#) of volunteers you can optionally make the name of the [Set \[pg:0858\]](#) you're printing appear in the report title by checking this checkbox.

Do not check this checkbox if you never want Set names to appear as part of the report title when you print this report for specific Sets of volunteers.

## Font name

Use the drop down list to choose the name of the font you would like Volgistics to use for printing the report title.

## First title font size

Second title font size

The report title may include two lines of text, and each line may be printed in a different font size. This enables you to have a larger main title, and smaller sub-title. Use the drop down lists to choose the font size (in points) for the first and second title line lines.

## Logo & title locations

Use the drop down list to choose the way you would like to arrange your organization's logo and the report title at the top of the page.

You may include your organization's logo on selected reports if you installed a logo graphic file in your Volgistics account setup.

## Body font name

Body font size

Use the drop down lists to choose the font style and font size (in points) for the text in the body of the report. The body of the report includes all of the report content except the report title.

If you also select *Fit to page*, Volgistics may adjust the size of the body font so the report will fit onto one page across.

## Lines

Column style reports can include lines around the border of the report and between report columns. Lines often make column oriented reports easier to read. Choose *On* if you want this report to include lines, or *Off* if you prefer no lines. This option does not affect the content of the report except by adding or removing the line graphics.

## Date and time printed

Choose *On* if you want this report to include the date and time the report was printed in the lower left corner of each page. Choose *Off* if you prefer not to have the date and time printed.

## Page numbers

Choose *On* if you want page numbers printed at the bottom of each page. Choose *Off* if you prefer not to have page numbers printed.

## Corner index

Reports that list volunteers alphabetically can include an index in the lower right corner of each page that shows you which last names appear on that page, alphabetically. This makes it easier to locate particular volunteers by name on reports that includes multiple pages. For example, a page that begins with "Bailey, George" and ends with "Cabot, Anita" might have a corner index of **B-Ca**, indicating that the page includes all of the volunteers whose last names fall within **B** and **Ca** alphabetically.

Choose *On* if you want this corner index printed at the bottom of each page. Choose *Off* if you prefer not to have this corner index printed.

When you're finished choosing the page design for your report click **Next** to continue to the next step.

### Related help

[Help Topic 2223 \[pg:0467\]](#) - Creating custom reports

---

## Volunteer List Reports

Help topic 8256

Added or revised 10-04-2016

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Volunteer list reports have a column and row format. They list volunteers alphabetically or by volunteer number, followed by any fields of information you choose from the volunteer record.

These are examples of the [stock \[pg:0595\]](#) Volunteer List reports provided, however you can create many other report varieties from this format.

### Name, address, and phone list (stock) [Details \[pg:0600\]](#)

Volunteer List Sample Organization Name		
Volunteer	Address	Phone numbers
Abbott, Chris	821 Campbell Dr. Anderson, IN 45259	(513) 555-6743 (Home) (513) 555-7286 (Work) (513) 555-0322 (Cell)
Acker, Claire	905 Cochrane Dr. Apt 122 Anderson, IN 45259	(513) 555-6752 (Home) (513) 555-7286 (Work) (513) 555-5560 (Cell) (513) 555-7621 (Pager)
Agans, Mavis	1343 Forester Ave.	(513) 555-6948 (Home)

### Flags and types list (stock) [Details \[pg:0601\]](#)

Flags & Types Sample Organization Name			
Volunteer	Status	Type	Flags
Abbott, Chris	Inactive	Adult	Auxiliary Blue team Board of directors Green team Hanover house Heart to heart Life member
Acker, Claire	Active	Adult	Auxiliary Board of directors Day of caring Green team Life member Red team Special projects
Agans, Mavis	Active	Adult	Donor Green team
Albers, Rita	Active	Junior	Auxiliary Day of caring

**Volunteer assignment list (stock) [Details \[pg:0602\]](#)**

Volunteer Assignment List Sample Organization Name					
Volunteer	Status	Assignment Assignment	Assignment Role	Assignment From	Assignment To
Abbott, Chris	Inactive	Adoption Counselor (Northside\Adoption) Adoption Promotion (Southside\Adoption)	Assigned Trainee	01-18-2002 01-03-2004	
Acker, Claire	Active				
Agans, Mavis	Active	Tour Guide (Northside\Direct Services) Tour Guide (Northside\Direct Services) Usher (Northside\Support Services)	Assigned Substitute Former	01-01-1990 02-15-2001 07-12-1992	12-31-1988
Albers, Rita	Active	Information Desk (Northside\Support Services)	Assigned	03-09-2003	
Alderman, Zuzana	Active	Information Desk (Northside\Support Services) Tutor (Northside\Direct Services) Usher (Northside\Support Services)	Assigned Assigned Assigned	08-01-1997 09-23-2002 08-12-2002	
Alf, Brian	Active	Vehicle maintenance (Northside\Support Services)	Assigned	08-12-2002	

**Volunteer message preferences (stock) [Details \[pg:0603\]](#)**



## Volunteer Message Preferences

Your Agency Name

Volunteer	Status	Message Preferences
Armstrong, Mary	Applicant	Checklist reminders (email) Electronic newsletters (email) Information Request (email) Recruitment appeals (email) Schedule reminders (email) Volunteer News (email)
Baccus, Lydia	Active	Checklist reminders (text) Electronic newsletters (email) Information Request (text) Recruitment appeals (text) Schedule reminders (text) Volunteer News (email)
Bailey, Victor	Applicant	Checklist reminders (email) Electronic newsletters (email) Information Request (email) Recruitment appeals (email)

### Volunteer service list (stock) [Details \[pg:0604\]](#)

Volunteer Service List				
Sample Organization Name				
Volunteer	Service Assignment	Service From date	Service To date	Service Hours
Abbott, Chris	Adoption Counselor [Northside\Adoption]	01-18-2003	01-18-2003	5:00
	Adoption Counselor [Northside\Adoption]	02-16-2003	02-16-2003	6:00
	Adoption Counselor [Northside\Adoption]	03-15-2003	03-15-2003	6:30
	Adoption Counselor [Northside\Adoption]	05-14-2003	05-14-2003	5:15
	Adoption Counselor [Northside\Adoption]	07-12-2003	07-12-2003	6:15
	Adoption Counselor [Northside\Adoption]	08-13-2003	08-13-2003	6:00
Acker, Claire				
Agans, Mavis	Tour Guide [Northside\Direct Services]	02-10-2003	02-10-2003	4:00
	Tour Guide [Northside\Direct Services]	03-08-2003	03-08-2003	2:00
	Usher [Northside\Support Services]	03-18-2003	03-18-2003	2:30
	Tour Guide [Northside\Direct Services]	04-12-2003	04-12-2003	4:00
	Tour Guide [Northside\Direct Services]	05-14-2003	05-14-2003	2:00
	Usher [Northside\Support Services]	05-16-2003	05-16-2003	2:30
	Tour Guide [Northside\Direct Services]	06-06-2003	06-06-2003	2:00
	Tour Guide [Northside\Direct Services]	06-22-2003	06-22-2003	4:00
	Tour Guide [Northside\Direct Services]	08-10-2003	08-10-2003	2:00
	Tour Guide [Northside\Direct Services]	12-10-2003	12-10-2003	4:00
				29:00
Albers, Rita	Information Desk [Northside\Support Services]	01-20-2003	01-20-2003	4:00

### Volunteer schedule list (stock) [Details \[pg:0605\]](#)

Volunteer Schedule List						
Sample Organization Name						
Volunteer	Schedule Date	Schedule Assignment	Schedule From	Schedule To	Schedule Regular	Schedule Note
Abbott, Chris	02-02-2004	Information Desk [Northside/Support Services]	8:00 a	12:00 p	Yes	
	02-04-2004	Information Desk [Northside/Support Services]	8:00 a	12:00 p	Yes	
	02-09-2004	Information Desk [Northside/Support Services]	8:00 a	12:00 p	Yes	
	02-11-2004	Information Desk [Northside/Support Services]	8:00 a	12:00 p	Yes	
	02-16-2004	Usher [Northside/Support Services]	6:30 p	8:00 p	No	
	02-16-2004	Information Desk [Northside/Support Services]	8:00 a	12:00 p	Yes	
	02-18-2004	Information Desk [Northside/Support Services]	8:00 a	12:00 p	Yes	
	02-23-2004	Information Desk [Northside/Support Services]	8:00 a	12:00 p	Yes	
Acker, Claire	02-25-2004	Information Desk [Northside/Support Services]	8:00 a	12:00 p	Yes	
	02-03-2004	Usher [Northside/Support Services]	6:00 p	8:00 p	Yes	
	02-05-2004	Usher [Northside/Support Services]	6:00 p	8:00 p	Yes	
	02-10-2004	Usher [Northside/Support Services]	6:00 p	8:00 p	Yes	
	02-12-2004	Usher [Northside/Support Services]	6:00 p	8:00 p	Yes	
	02-17-2004	Usher [Northside/Support Services]	6:00 p	8:00 p	Yes	
	02-19-2004	Usher [Northside/Support Services]	6:00 p	8:00 p	Yes	
02-24-2004	Usher [Northside/Support Services]	6:00 p	8:00 p	Yes		
02-25-2004	Usher [Northside/Support Services]	6:00 p	8:00 p	Yes		

Regular schedule list report (stock) [Details \[pg:0606\]](#)

Regular Schedule List Report				
Sample Organization Name				
Volunteer	Regular Schedule Assignment	Regular Schedule From	Regular Schedule To	Regular Schedule Days
Barclay, Andrea	Patient Advocate	10:00 a	12:00 p	Mo (every) Tu (every) We (every) Th (every) Fr (every)
Bucholz, Tim	Emergency Assistant	7:00 a	12:00 p	Th (every)
Coolidge, Sarahlyn	Office Work	11:00 a	4:30 p	Mo (Alternate )
Dalman, Malinda	Emergency Assistant	7:00 a	12:00 p	Mo (every) Tu (every) We (every)

Volunteer checklist report (stock) [Details \[pg:0608\]](#)

Volunteer Checklist Report			
Sample Organization Name			
Volunteer	Status	Type	Checklist
Abbott, Chris	Active	Adult	Confidentiality statement (complete) CPR (due again 01-20-2005) Dues - 2004 (pending) Health screening (due again 01-20-2005) Orientation (complete)
Acker, Claire	Active	Adult	Confidentiality statement (complete) CPR (pending) Dues - 2004 (pending) Health screening (due again 02-12-2004) Orientation (complete)
Agans, Mavis	Active	Adult	Confidentiality statement (complete)



**Volunteer date history (stock) Details [pg:0609]**

Volunteer Date History					
Sample Organization Name					
Volunteer	Dates Kind	Dates Event	Dates Date	Dates Expires	Dates Notation
Abbott, Chris	Status	Active	05-15-1993		
	Checklist	Confidentiality statement	03-15-2002		
	Checklist	CPR	12-21-2003	01-20-2005	
	Checklist	Health screening	01-21-2004	01-20-2005	
Acker, Claire	Checklist	Orientation	04-14-2000		
	Status	Active	01-20-2002		
	Checklist	Confidentiality statement	01-21-2002		
	Checklist	Health screening	02-12-2002	02-12-2003	
Agans, Mavis	Checklist	Health screening	02-10-2003	02-12-2004	
	Checklist	Orientation	03-16-2002		
	Status	Active	02-08-1998		

**Volunteer contacts list (stock) Details [pg:0610]**

Volunteer Contacts List					
Sample Organization Name					
Volunteer	Contact Kind	Contact Relationship	Contact Name	Contact Address	Contact Phone numbers
Abbott, Chris	Emergency Contact	Spouse	Abbott, Larry	821 Campbell Dr. Anderson, IN 45259	(123) 555-1234 (Home) (123) 555-1222 (Cell)
Acker, Claire	Emergency Contact	Father	Bailey, George	Bedford Falls, OH	(123) 123-1234 (Home) (123) 123-1222 (Cell)
	Employer			Anderson Rentals 1516 Main Street Bedford Falls, IN 49504	(513) 555-2000 (Work)
Agans, Mavis	Emergency Contact	Spouse	Agans, George	1343 Forester Ave. Anderson, IN 45245	(513) 555-1234 (Home) (513) 555-8021 (Cell)
	Minister		Clark, Howard		(513) 555-1000 (Work)
Albers, Rita	Emergency Contact	Co-worker	Benson, Lavonne	220 Susamore St.	(513) 555-1298 (Home)

**Volunteer award list (stock) Details [pg:0611]**

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## Options (Volunteer Profile Reports)

Help topic 1064

Added or revised 03-20-2013

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The *Options* page appears when you create a new report or modify an existing report. Use the controls on this Options page to customize the structure of a **Volunteer Profile** report.

Choose to sort volunteers in your Volunteer Profile report by one of the following items:

### Volunteer name

Choose this option to sort volunteer information alphabetically by volunteer name.

### Volunteer number

Choose this option to sort volunteer information by (ascending) volunteer number.

### Type

Choose this option to sort volunteer information by volunteer Type, for instance, grouping all "Adult" volunteers together and all "Junior" volunteers together in the Volunteer Profile report.

### *Start a new page for each volunteer*

Mark this option to begin a separate page for each individual volunteer included in the Volunteer Profile report.

### *If a field is blank*

If a volunteer record included in the Volunteer Profile report does not contain information in all fields included in the report, you can choose to omit the blank field's name from the report or include the field name without any accompanying information.

When you're finished choosing the Options for your report, click **Next** to continue to the next step.

### **Related help**

[Help Topic 2223 \[pg:0467\]](#) - Creating custom reports

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## Fields (Volunteer Profile Reports)

Help topic 1083

Added or revised 03-20-2013

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The *Fields* page appears when you create a new report or modify an existing report. Use the Fields page to choose the fields you want to appear on this **Volunteer Profile** report.

### **Instructions**

Use the Instructions field to enter any directions or comments that should appear on the page before each volunteer's information.

In many cases a Volunteer Profile report will be used to create a printable version of a completed volunteer application form (after receiving the application into the system). This report can then be used by a volunteer office to review volunteer information, sometimes with the applicant present. If the Volunteer Profile report will be reviewed by both an applicant and an organization representative, the Instructions field might say something like, "We look forward to your participation in our volunteer program. Please confirm the accuracy of the information on this form and sign the Sample Agency Volunteer Status Policy agreement at the bottom of this page."

## Instructions

We look forward to your participation in our volunteer program. Please confirm the accuracy of the information on this form and sign the Sample Agency Volunteer Status Policy agreement at the bottom of this page.

Enter any instructions you would like to appear on the page before each volunteer's information

### Volunteer record fields

After completing the Instructions field section, mark the boxes next to each field tracked in the volunteer record that should appear on the Volunteer Profile report for each volunteer. Your report will include a column for each item you select. For example, if an organization needed to see only the names of volunteers in the report, the system operator creating the report would mark only the boxes for name fields. If, however, an organization also wanted to see all of the information stored on each volunteer's Profile tab, they would additionally mark each of the field boxes in the Profile tab section on the report's Fields page.

Since each field becomes a report column, fields should be chosen sparingly. If more columns than can fit legibly from left to right on a page are included, Volgistics automatically extends the report to additional pages *right* before starting the next page *down*.

### Signature Fields

Use the Signature fields to include a signature section on the Volunteer Profile report. This is especially useful when using the Volunteer Profile report to preview application forms.

Enter a heading in the Heading field. For example, a heading might be, "Sample Agency Volunteer Status Policy."

Enter a statement to appear above the signature box in the Statement field. For example, "I confirm that the information on this form is accurate as of today's date. I also understand that it is the right of Sample Agency to terminate my volunteer status at any time, for any reason they deem necessary."

Mark the "Include space for an 'Applicant' signature and date" box if an applicant will be signing the document, and/or mark the "Include space for an 'Approved by' signature and date" if a supervisor or staff member will be signing it.

## Signature fields

Heading:

Statement:

Include space for an 'Applicant' signature and date

Include space for an 'Approved by' signature and date

If the Signature fields section of the Fields page is left blank, no signature fields will appear on the Volunteer Profile report.

### Office-use-only fields

The office-use-only fields provide space for the organization to make up to four notes or comments on the report. Enter a heading for each necessary office-use-only field.

### Office-use-only fields

Heading:

Heading:

Heading:

Heading:

When you're finished choosing the Fields for your report, click **Next** to continue to the next step.

### Related help

[Help Topic 2223 \[pg:0467\]](#) - Creating custom reports

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## Include (Volunteer Profile Reports)

Help topic 1092

Added or revised 10-02-2014

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The *Include* page appears when you create a new report or modify an existing report. Use the options on the Include page to choose which volunteers you want to *include* in this **Volunteer Profile** report.

### Which volunteers do you want to include in this report?

Choose which volunteers you want to appear on this report.

#### Tagged volunteers

This checkbox is disabled unless you previously [tagged \[pg:1529\]](#) one or more volunteer records. Check this checkbox if you want the report to include the tagged volunteers.

#### These volunteers:

Check this checkbox if you want the report to include **all** volunteers, or just the volunteers you specify using the following controls: (uncheck this checkbox only if you selected the *Tagged volunteers* checkbox and you want this report to include *only* the tagged volunteers).

#### Status

Choose *Any* if you want this report to include volunteers regardless of what their **current** status is.

Choose *Any of these* if you want this report to include volunteers whose **current** status is one of those you check, then check the statuses you want to include.

### Type

Choose *Any* if you want this report to include volunteers regardless of what their Type is.

Choose *Any of these* if you want this report to include only volunteers whose Type is one of those you check, then check the Types you want to include.

The Type field appears in the Name box on the **Core tab** [pg:1868], and it is typically used for classifying volunteers by major program type, such as 'adult,' 'junior,' 'student,' 'regular,' 'occasional,' 'auxiliary,' and so forth.

### Kind

The Kind field is located on the Core tab in each volunteer record. It is used to show if a volunteer record is for an individual person or a **group** [pg:1909] that volunteers.

Select *Both individuals and groups* if you want the report to include both individuals and groups.

Select *Individuals only* if you want the report to only include individual volunteer records.

Select *Groups only* if you want the report to only include group volunteer records.

### Flag

Choose *Any* if you want this report to include volunteers regardless of what Flags appear on their Core tab.

Choose *Any of these* if you want this report to include only volunteers who have at least one of the Flags you check, then check the Flags you want to include.

Flags appear in the Flag box on the **Core tab** [pg:1868] for each volunteer. Flags are typically used to classify volunteers into different overlapping groups, such as 'board of directors,' 'donor,' 'sponsor,' 'day of caring,' 'red team,' and so forth.

### Site

This option appears if you use **Site Level Access** [pg:0092] in Volgistics, and you have access to the volunteer records for all Sites in your organization.

Choose *Any* if you want this report to include volunteers regardless of which Sites they serve at.

Choose *Any of these* if you want this report to include only volunteers who serve at at least one of the Sites you check, then check Sites you want to include.

### Set

Check this option, and then select a **Set** [pg:0858] if you want this report to include only the volunteers in a certain Set.

When you're finished choosing the Include options for your report click **Next** to continue to the next step.

## Related help

[Help Topic 2223 \[pg:0467\]](#) - Creating custom reports

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# Page design (Volunteer Profile Reports)

Help topic 1126

Added or revised 03-20-2013

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The Page Design page appears when you create a new report or modify an existing report. Use the options on the Page Design page to customize the page formatting for your Volunteer Profile report.

## Page size

Use the drop down list to choose the paper or envelope size for this report. The default page size is "Letter."

## Margin width

Enter the size (in inches) of the margin you want to appear around the edge of the page. The default margin width is one half inch (0.5 inches).

## Page orientation

Choose the way you would like the pages of the report to be oriented, portrait or landscape.

## First title line

Second title line

Type what you want to appear for the report title. Report titles may be two lines long.

The report title appears at the top of the first page, and at the top of subsequent pages if the report supports page breaks and you selected page breaks for the report.

## Add Site name

Check this checkbox if you want the Site name to appear as part of the report title when a [Site Level Operator \[pg:1442\]](#) prints a shared report. A shared report is a stock report, or a report created by the headquarters Site for use by all Sites. When you check this box, report titles will include the name of Site where the report was printed whenever the report is printed by a Site Level Operator. Do not check this box if you do not want shared reports which are printed by Site Level Operators to include the Site name.

This option only appears if you use the [Site Level Access \[pg:0092\]](#) features.

## Add Set name

If you [print this report for different Sets \[pg:0863\]](#) of volunteers you can optionally make the name of the [Set \[pg:0858\]](#) you're printing appear in the report title by checking this checkbox.

Do not check this checkbox if you never want Set names to appear as part of the report title when you print this report for specific Sets of volunteers.

## Font name

Use the drop down list to choose the name of the font you would like Volgistics to use for printing the report title.

### **First title font size**

Second title font size

The report title may include two lines of text, and each line may be printed in a different font size. This enables you to have a larger main title, and smaller sub-title. Use the drop down lists to choose the font size (in points) for the first and second title line lines.

### **Logo & title locations**

Use the drop down list to choose the way you would like to arrange your organization's logo and the report title at the top of the page.

You may include your organization's logo on selected reports if you installed a logo graphic file in your Volgistics account setup.

### **Body font name**

Body font size

Use the drop down lists to choose the font style and font size (in points) for the text in the body of the report. The body of the report includes all of the report content except the report title.

If you also select *Fit to page*, Volgistics may adjust the size of the body font so the report will fit onto one page across.

### **Lines**

Column style reports can include lines around the border of the report and between report columns. Lines often make column oriented reports easier to read. Choose *On* if you want this report to include lines, or *Off* if you prefer no lines. This option does not affect the content of the report except by adding or removing the line graphics.

### **Date and time printed**

Choose *On* if you want this report to include the date and time the report was printed in the lower left corner of each page. Choose *Off* if you prefer not to have the date and time printed.

### **Page numbers**

Choose *On* if you want page numbers printed at the bottom of each page. Choose *Off* if you prefer not to have page numbers printed.

### **Corner index**

Reports that list volunteers alphabetically can include an index in the lower right corner of each page that shows you which last names appear on that page, alphabetically. This makes it easier to locate particular volunteers by name on reports that includes multiple pages. For example, a page that begins with "Bailey, George" and ends with "Cabot, Anita" might have a corner index of **B-Ca**, indicating that the page includes all of the volunteers whose last names fall within **B** and **Ca** alphabetically.

Choose *On* if you want this corner index printed at the bottom of each page. Choose *Off* if you prefer not to have this corner index printed.

When you're finished choosing the page design for your report click **Next** to continue to the next step.

### Related help

[Help Topic 2223 \[pg:0467\]](#) - Creating custom reports

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## Volunteer Profile Reports

Help topic 8264

Added or revised 05-24-2016

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Volunteer Profile reports are designed to give you an overview of the information on a [volunteer record \[pg:1849\]](#). The reports are only available in [PDF \[pg:0449\]](#) format because they can include volunteer [photos \[pg:1798\]](#). There are two [stock \[pg:0595\]](#) reports under the Volunteer Profile reports. You can see example of these below:


### Volunteer Profile-Group (stock) [Details \[pg:0684\]](#)

The screenshot shows a report titled "Volunteer Profile-Group" for Karen Graham. The report is organized into several sections:


- Personal Information:** Graham, Karen; 390 Wildrose Lane, Suite 10-B, Byron Center, MI 49315; (313) 772-1411 (Home); (214) 988-9222 (Cell).
- Name:** Number: 914; Type: Group; Kind: Group.
- Group:** Group name: Boukamp, Graham & Schindel, PC; Members: 7; Participation: The same volunteers each time.
- Address:** Email: karenmgraham@bgspc.com.
- Flags:** Corporate Volunteer Hour Matching; OK to Schedule with Other Groups; Green Team.
- Message Preferences:** Checklist reminders (email); [unclear] (email).

### Volunteer Profile-Individual (stock) [Details \[pg:0682\]](#)



Volunteer Profile-Individual	
Your Agency Name Lydia Baccus	
	Baccus, Lydia 4632 Cherry Ridge Drive Wyoming, MI 49509  (585) 771-7662 (Home) (213) 321-3439 (Cell)
<b>Name</b>	Number: 774 Type: Adult
<b>Address</b>	Email: lydiarbaccus@mailinator.com
<b>Flags</b> Approved Driver First Aid Certified Review Committee	CBB

You can also customize the reports to include different fields, or use different font sizes and styles. In addition, the **Fields tab** [pg:0697] of the reports have options to add instruction fields to the top of the form:

Volunteer Profile-Individual	
Your Agency Name Lydia Baccus	
The information we have on file for you appears below. Please review the information for accuracy and make any corrections in ink. If the information is correct, read the Agreement section, then sign and date the form.	
	Baccus, Lydia 4632 Cherry Ridge Drive Wyoming, MI 49509  (585) 771-7662 (Home) (213) 321-3439 (Cell)
<b>Name</b>	

As well as heading, text box, signature, and office use fields at the bottom:

Kind: Emergency contact		Relationship: Daughter	
Street 1: 1734 Twin Oaks Drive		Home: (585) 771-7662	
City: Grand Rapids		Cell: (231) 519-8719	
State: MI Zip: 49546			
<b>Agreement</b>			
I have reviewed the information on file for my volunteer record and found it to be accurate.			
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Lydia Baccus (signature)	Date	Approved (signature)	Date
<b>Office Use Only</b>			
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Verified Contact Information		Interview Scheduled	

To customize a stock report, click the **Clone it** button after you select the name of the report from the Print menu.

Or you can create a custom Volunteer Profile report from scratch by:

1. Select Print from the menu.
2. Expand the *Volunteer profile* link.
3. Select *Create a new volunteer profile report*.
4. Go through each of the tabs and select the options you want.
5. Save the report on the Save tab.

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## How to change the billing contact's email address

Help topic 1019

Added or revised 04-30-2013

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Each Volgistics account has a billing contact email address. If your account's billing contact email address changes, you must update this information online. This is not something Volgistics can update for you. The email address for the billing contact is important because Volgistics uses it to send important email messages with information about your account.

With **Automatic billing** [pg:0733], Volgistics sends billing notices to the account's billing contact four days before the account is billed each month. In addition, the billing contact receives email acknowledgments of each transaction in the account.

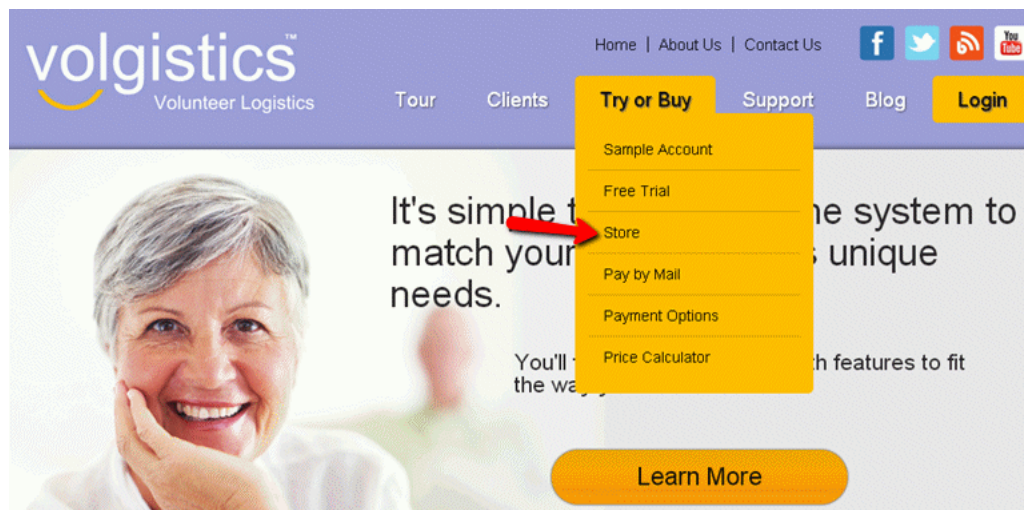
With **Pre-payment** [pg:0733], Volgistics sends the billing contact account renewal notices starting 90 days before an account's expiration date. A transaction acknowledgement is also sent when the Volgistics Accounting Department processes a payment for your account.

The billing contact also receives important account updates such as if a credit card's information needs to be updated, or a credit card transaction isn't authorized by your credit card company.

To ensure that your organization always receives these notices, please be sure to keep your billing contact's email address up-to-date.

You can update your billing contact email address like this:

1. Visit [www.volgistics.com](http://www.volgistics.com).
2. Hover over Try or Buy in the menu at the top of the page and select Store.



3. Enter your nine digit Volgistics account number.
4. Enter the Volgistics login name and password for a **Volgistics Administrator** [pg:0052], or the **accounting access code** [pg:0728] for your account, and then click the **Continue** button.

5. Click the link to "Change billing contact email address."
6. Enter the new email address twice to confirm the entry.
7. Click the **Save** button.

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## Can I make my account for an annual special event dormant?

Help topic 1206

Added or revised 07-03-2013

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To use Volgistics, you pay a single monthly service fee. There is no software to buy, no separate licensing fees, and no additional ongoing charges for support or upgrades. There is also not a contract required so you are free to discontinue the service, or change your service level, at any time.

The monthly service fee depends on:

- The number of volunteers you want to track (non-archived records)
- The number of volunteer records you want to store ([archived \[pg:0709\]](#) records)
- The number of [System Operators \[pg:0065\]](#) you need
- Whether or not the optional [VicNet \[pg:1724\]](#) and [VicTouch \[pg:1778\]](#) modules are included

Organizations that use Volgistics for an annual special event may have a time of year when they actively use Volgistics, and other times of the year when they do not. This help topic gives ideas on how you can use Volgistics in cases like this if you do not want to pay the full service fee year-round.

### **Please note:**

If you use either of these options we recommend using the Automatic Payment method or only pre-paying on a month-to-month basis. That way changes in service will take place quicker so you'll take full advantage of the savings. You can find out more about options for paying your account in [help topic 2303 \[pg:0733\]](#).

### **Option One: Discontinue Volgistics and Restart Next Year**

One option is to discontinue your Volgistics account altogether after your event ends and then start a new account for the following year's event as it approaches. This option has the advantage of not requiring any payment at all during the off months. Disadvantages to this approach are that you'll need to setup your account each year and you'll lose some volunteer details if the information is transferred from the old account to the new account. For example, volunteer service hours can only be transferred as a life-time lump sum instead of as individual service entries.

To do this, here are steps to follow when your event ends:

1. Make an Excel report with your volunteer data and save this to your local computer (or other local storage medium). [Help topic 2164 \[pg:0461\]](#) has information on how to do this. If your organization requires returning volunteers to submit a new application form each year and you do not want to keep historical information about volunteers, you can skip this step.
2. Cancel your Volgistics account by following the steps shown in [help topic 2262 \[pg:0894\]](#).
3. Start a new Volgistics account when the time comes to start preparing for your annual event. [Help topic 2301 \[pg:0224\]](#) shows how to do this.

4. If you saved your volunteer data in step 1 and want to load information for returning volunteers into your account, use our free Import Utility program. You can find information about this at the following URL address:

<https://www.volgistics.com/Import-Utility.htm>

5. Setup your account for the event. You can find information on how to do this in [help topic 1155 \[pg:0191\]](#).

### **Option Two: Reduce Your Service Levels During the Off Months**

Another option is to reduce your account's service level during the months when you do not need to actively use Volgistics. Because your account's service fee is based on the level of service selected, this allows you to pay a reduced amount during the months when you do not need to use the system. This option allows you to keep your account setup and details for your existing volunteers, but will cost more than the first option because the account is still maintained even if it is at a much lower level.

To use this option, you may need to temporarily raise your service level to have enough room to move records around. For this reason, we suggest completing steps 1 and 2 in the list below about 10 days before your account's current paid through date.

If your account is setup for Automatic Payments, making the change will result in a small charge to make up for the difference in service levels until the paid through date. If your account is setup for Pre-payment, making the change will pull your paid through date closer. The *Account Status* page shown in step 1 below lists the paid through date for your account in the *Payment* section.

Here are steps to follow:

1. Go to the

#### *Account Status*

page to find the number of non-archived and archived records in your account. To get to this page, select [Setup \[pg:0887\]](#) from the menu, expand the *Account management* link, and select *Account status*. The number of records in use will be in the *Space Available* section of the page.

You will be able to keep 50 records in the non-archived section and you may have records already in your archived section. So to get the amount of space needed to store records in the archive, subtract 50 from the non-archived total and then add the archived total.

2. Increase the service level in your account so there is enough room in the archived section for the total number of records you came up with in step 1. [Help topic 2166 \[pg:0731\]](#) has information on how to change the service level for your account. Wait until after your event ends to continue with steps 3 - 5.

3. After your event ends, move all of the non-archived records except 50 into the archived section. [Help topic 2000 \[pg:1819\]](#) shows how to archive an individual record. You can also use the [Tags \[pg:1529\]](#) feature to move multiple records to the archived section. [Help topic 2137 \[pg:1999\]](#) explains more in the *Archive the tagged volunteers* section.

4. Delete all System Operators in your account except for two. [Help topic 2029 \[pg:1441\]](#) shows how to do this.

5. Decrease the service level for your account so that there 50 non-archived records, 2 System Operators, and the VicNet and VicTouch modules are not included. You will need to leave the archived setting high enough to accommodate all of the records you moved there. [Help topic 2166 \[pg:0731\]](#) has information on how to change the service level for your account.

Your account can remain like this until your event approaches. At that point, you will need to increase your service level to allow for all of the Volgistics features you need during the time you actively use Volgistics for your event.

### Related help

[Help Topic 1155 \[pg:0191\]](#) - Using Volgistics for Special Events

[Help Topic 2002 \[pg:0710\]](#) - Volgistics Price List

[Help Topic 2027 \[pg:0719\]](#) - Service Levels

[Help Topic 2166 \[pg:0731\]](#) - How do I change the service level on my account?

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## Archived Versus Non-archived Records

Help topic 1999

Added or revised 04-23-2014

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In Volgistics, your account is divided into two sections--the non-archived records and the archived records. Your account's [service level \[pg:0719\]](#) determines how many records you can have in each section.

The non-archived section is designed to allow you to manage records. Records in this section can have service recorded, be placed on the schedule, receive email communication, be grouped by adding tags, and are available in all types of reports.

The archived section is designed for record storage. All volunteer information (with the exception of their schedule) is still available on the record and it can be [restored \[pg:1852\]](#) to the non-archived section at any time. However, these records are much more limited as to what can be done with them. For example, volunteers with archived records:

- Do not appear on Volgistics reports by default except for [Service Summary \[pg:0580\]](#) and [Service Details \[pg:0560\]](#) reports. Archived records are also included in [Excel spread sheet \[pg:0513\]](#) and Statistic reports when the report is setup to include them. Archived records cannot be included on any other report type. See [Help topic 1997 \[pg:0442\]](#) for more information on this.
- Cannot be [scheduled \[pg:0746\]](#) for new assignments and will not appear on any schedules they were previously assigned to.
- Cannot be [tagged \[pg:1529\]](#).
- Cannot use the [VicNet \[pg:1724\]](#) or [VicTouch \[pg:1778\]](#) modules.
- Cannot receive [email \[pg:0404\]](#), [text \[pg:0343\]](#), or [VIC mail \[pg:0315\]](#) messages.
- Do not appear on the [Birthday List \[pg:1385\]](#).

Because of this more limited functionality, archived records cost significantly less on a record-by-record basis than non-archived records. This makes them a good option for records you want to keep, but where you do not need to actively manage the volunteer.

Your account's [service fee \[pg:0710\]](#) is based on the number of non-archived and archived records you keep. Moving records from one area to the other allows you to more carefully manage your costs. For example, let's say your account currently has a limit of 500 non-archived records, and you have 480 non-archived records and 80 archived records. You will only be able to add 20 additional records to the non-archived section and then you will reach your limit of 500 records. However, if you archive 15 records, your account will now have 465 non-archived records and 95 archived records. So now you can add 35 records to the non-archived section before the limit of 500 records is reached.

### Archive Versus Status

Please note that the archived and non-archived sections of your account are a separate, independent designation from a volunteer's [Status \[pg:1832\]](#). A volunteer record can have any Status that is setup in your account in either the archived or the non-archived section of your account. So an archived record could have the "Active" Status even though it is in the archived section. Some organizations choose to create a custom Status

called "Archived." While this may be useful for them, a record with the Status of "Archived" could be in either the archived or the non-archived section of your account.

### Related help

[Help Topic 1997 \[pg:0442\]](#) - Including Archived Records on Reports

[Help Topic 1998 \[pg:1817\]](#) - Finding Archived Records

[Help Topic 2000 \[pg:1819\]](#) - Archiving Volunteer Records

[Help Topic 2027 \[pg:0719\]](#) - Service Levels

[Help Topic 2034 \[pg:1852\]](#) - How do I restore a volunteer record from the archive?

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## Volgistics Price List

Help topic 2002

Added or revised 02-08-2017

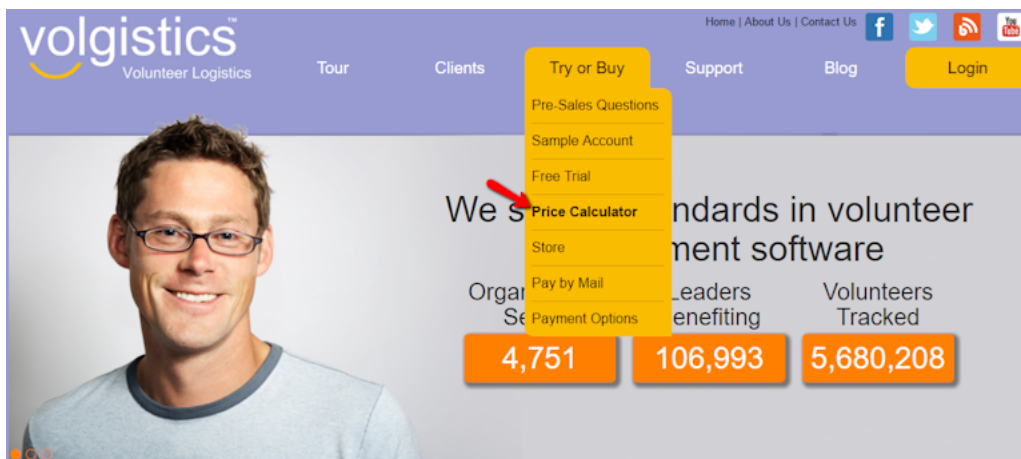
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You pay a single monthly fee to use Volgistics. There is no software to buy, no separate licensing fees, and no additional ongoing charges for support or upgrades.

The monthly service fee depends on:

- The number of volunteers you want to track (non-archived records)
- The number of volunteer records you want to store ([archived \[pg:0709\]](#) records)
- The number of [System Operators \[pg:0065\]](#) you need
- Whether or not the optional [VicNet \[pg:1724\]](#), [VicTouch \[pg:1778\]](#) and [VicDocs \[pg:1648\]](#) modules are included

The Volgistics web site has a *Price Calculator* you can use to determine what the monthly service fee is for the services you want to use. To use the Price Calculator, visit [www.volgistics.com](http://www.volgistics.com), hover over Try or Buy on the menu at the top of the page, and select "Price Calculator."



The Price Calculator uses the prices below to automatically calculate your monthly service fee. You can also use the price list below to calculate your rate manually if you prefer. To do this, determine the dollar amounts for the service levels you need in sections A through F below. Then, add each of these values together to obtain your total monthly service fee.

### **Section A. Number of volunteer records you want to track**

The number of volunteer records you want to track becomes the maximum number of individual or group volunteer records you can track in your account at one time. Choose the number that will give you enough room for all of the volunteer records you know you will track right away, plus enough extra space to accommodate the number of new volunteer applications you expect to receive in the next month or two.

These levels are available:

50 (50 volunteers maximum)

100 (100 volunteers maximum)

200 (200 volunteers maximum)

500 (500 volunteers maximum)

1000 (1,000 volunteers maximum)

Between 10,000 and 20,000, levels increase in multiples of 1,000 volunteers (e.g. 2,000, 3,000, etc.). After

20,000 volunteers, levels increase in multiples of 2,500 volunteers (e.g. 22,500, 25,000, 27,500, etc.).

Here's an example of how to choose the right level for your needs: If you have 1,600 existing volunteers and you expect to receive as many as 200 new volunteer applications in the next month, you would need space for at least 1,800 records. In this example you would choose the 2000 volunteer level (1,000 would be too few and 3,000 would be too many).

You can always change your account Service Level to provide space for more or fewer volunteer records as your needs change. If you anticipate needing to lower your service level, we recommend only paying for one month of service at a time. This is because the new rate for the lower service fees will not take effect until the paid service period ends. [Help topic 2303 \[pg:0733\]](#) explains more under the *Additional terms* heading.

In counting the number of non-archived volunteer records your account contains, Volgistics includes volunteer records with any volunteer [Status \[pg:1832\]](#) (e.g. Applicant, Active, Inactive, etc). However, it does not count volunteer records you store in the archive--these are counted in your archived total.

Number of volunteer records you want to track (up to)	Monthly Rate
50	\$9
100	\$18
200	\$24
500	\$30
1,000	\$40
2,000	\$79
3,000	\$113
4,000	\$140
5,000	\$163
6,000	\$180
7,000	\$193
8,000	\$200
9,000	\$213
10,000	\$225
11,000	\$248
12,000	\$270
13,000	\$293



14,000	\$315
15,000	\$338
16,000	\$360
17,000	\$383
18,000	\$405
19,000	\$428
20,000	\$450
22,500	\$506
25,000	\$562
27,500	\$618
30,000	\$674
32,500	\$730
35,000	\$786
40,000	\$898
45,000	\$1,010
50,000	\$1,122
55,000	\$1,234
60,000	\$1,346
65,000	\$1,458
70,000	\$1,570
75,000	\$1,682
80,000	\$1,794
85,000	\$1,906
90,000	\$2,018
95,000	\$2,130
100,000	\$2,242

**Section B. Number of archived volunteer records you want to store**

Volgistics includes a feature for archiving volunteer records you no longer use on a regular basis. Generally these are records for volunteers who are no longer actively volunteering (for any reason). In some cases, you may need to keep these volunteer records for service reports or in case the volunteer returns to service. Because the records are only stored in the system, the per-record rate for archived records is much lower than the rate for records that are not archived.

You can easily move individual volunteer records to and from archived storage in Volgistics. When you archive a record, it is moved to a storage area from which you can later restore the record in its entirety (except for the volunteer's schedule) should you need it. While a record is in archived storage, it will have more limited functionality than a non-archived record. [Help topic 1999 \[pg:0709\]](#) explains more. When you restore a record from archived storage it becomes a non-archived record and adds to your overall volunteer count.

Choose the maximum number of archived records you would like to be able to store in Volgistics.

You can always change your account Service Level to provide space for more or fewer archived volunteer records as your needs change. If you anticipate needing to lower your service level, we recommend only paying for one month of service at a time. This is because the new rate for the lower service fees will not take effect until the paid service period ends. [Help topic 2303 \[pg:0733\]](#) explains more under the *Additional terms* heading.

<b>Number of archived volunteer records you want to store</b>	<b>Monthly rate</b>
50	\$0
100	\$1
200	\$5
500	\$8
1,000	\$10
2,000	\$20
3,000	\$30
4,000	\$40
5,000	\$50
6,000	\$60
7,000	\$70
8,000	\$80
9,000	\$90
10,000	\$100
11,000	\$110
12,000	\$120
13,000	\$130
14,000	\$140
15,000	\$150
16,000	\$160
17,000	\$170
18,000	\$180
19,000	\$190
20,000	\$200
22,500	\$225
25,000	\$250
27,500	\$275
30,000	\$300

32,500	\$325
35,000	\$350
40,000	\$400
45,000	\$450
50,000	\$500
55,000	\$550
60,000	\$600
65,000	\$650
70,000	\$700
75,000	\$750
80,000	\$800
85,000	\$850
90,000	\$900
95,000	\$950
100,000	\$1,000

**Section C. Number of System Operators**

**System Operators** [pg:0065] are the people in your organization who will use Volgistics to manage volunteer records. Volgistics is a multi-user system. Different System Operators in your organization can use the system at the same time as long as they have different login credentials.

You give each System Operator a Volgistics login name and password which they use to access the system. You can also set certain account access permissions for each operator to control the kinds of information they can access, or the features they can use.

Although you can give more than one individual the same System Operator login name and password, they cannot access the system at the same time as another person using the same login name and password (people with different Volgistics login names and password can use the system at the same time). In addition, the access permissions you set for an individual System Operator will apply to everyone who uses that System Operator's login name and password to access the system.

Every Volgistics account starts with space for two System Operators. If you would like to have more than two System Operators, the monthly rate for each additional System Operator is \$10.

You can always change your account Service Level to provide space for more or fewer System Operators as your needs change. If you anticipate needing to lower your service level, we recommend only paying for one month of service at a time. This is because the new rate for the lower service fees will not take effect until the paid service period ends. **Help topic 2303** [pg:0733] explains more under the *Additional terms* heading.

Number of System Operators	Monthly rate
1	\$0
2	\$0
3 to 100	\$10 for each additional System Operator

## **Section D. VicNet**

If you choose to use the optional [VicNet \[pg:1724\]](#) module, your monthly service fee will increase from the base fee (the rate derived from the table under "Section A. Number of volunteer records you want to track" above), based on the number of volunteer records you have the ability to track.

<b>Number of volunteer records you have chosen to track</b>	<b>Monthly Fee for VicNet</b>
50	\$3
100	\$6
200	\$8
500	\$10
1,000	\$13
2,000	\$26
3,000	\$37
4,000	\$46
5,000	\$54
6,000	\$60
7,000	\$64
8,000	\$66
9,000	\$71
10,000	\$75
11,000	\$82
12,000	\$90
13,000	\$97
14,000	\$105
15,000	\$112
16,000	\$120
17,000	\$127
18,000	\$135
19,000	\$142
20,000	\$150
22,500	\$168
25,000	\$187
27,500	\$206
30,000	\$224
32,500	\$243

35,000	\$262
40,000	\$299
45,000	\$336
50,000	\$374
55,000	\$411
60,000	\$448
65,000	\$486
70,000	\$523
75,000	\$560
80,000	\$598
85,000	\$635
90,000	\$672
95,000	\$710
100,000	\$747

**Section E. VicTouch**

If you choose to use the optional **VicTouch** [pg:1778] module, your monthly service fee will increase from the base fee (the rate derived from the table under "Section A. Number of volunteer records you want to track" above), based on the number of volunteer records you have the ability to track.

<b>Number of volunteer records you have chosen to track</b>	<b>Monthly Fee for VicTouch</b>
50	\$3
100	\$6
200	\$8
500	\$10
1,000	\$13
2,000	\$26
3,000	\$37
4,000	\$46
5,000	\$54
6,000	\$60
7,000	\$64
8,000	\$66
9,000	\$71
10,000	\$75
11,000	\$82

12,000	\$90
13,000	\$98
14,000	\$105
15,000	\$112
16,000	\$120
17,000	\$127
18,000	\$135
19,000	\$142
20,000	\$150
22,500	\$168
25,000	\$187
27,500	\$206
30,000	\$224
32,500	\$243
35,000	\$262
40,000	\$299
45,000	\$336
50,000	\$374
55,000	\$411
60,000	\$448
65,000	\$486
70,000	\$523
75,000	\$560
80,000	\$598
85,000	\$635
90,000	\$672
95,000	\$710
100,000	\$747

**Section F. VicDocs**

If you choose to use the optional [VicDocs \[pg:1648\]](#) module, your monthly service fee will increase from the base fee (the rate derived from the table under "Section A. Number of volunteer records you want to track" above), based on the number of volunteer records you have the ability to track.

<b>Number of volunteer records you have chosen to track</b>	<b>Monthly Fee for VicDocs</b>
50	\$2

100	\$3
200	\$4
500	\$5
1,000	\$7
2,000	\$13
3,000	\$18
4,000	\$24
5,000	\$27
6,000	\$30
7,000	\$32
8,000	\$34
9,000	\$36
10,000	\$38
11,000	\$42
12,000	\$45
13,000	\$48
14,000	\$53
15,000	\$57
16,000	\$60
17,000	\$63
18,000	\$68
19,000	\$72
20,000	\$75
22,500	\$84
25,000	\$94
27,500	\$103
30,000	\$112
32,500	\$122
35,000	\$131
40,000	\$150
45,000	\$168
50,000	\$187
55,000	\$206
60,000	\$224
65,000	\$243

70,000	\$262
75,000	\$281
80,000	\$299
85,000	\$318
90,000	\$337
95,000	\$355
100,000	\$374

Once you have determined the costs you will accrue for each section, find the sum of all costs for your total monthly service fee.

Price list effective 03-01-2011. Prices subject to change with 30 days notice.

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## Service Levels

Help topic 2027

Added or revised 09-30-2016

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Your organization pays a monthly fee to use the Volgistics service. The amount of this fee is based on the service level you choose.

Your service level is what determines how many volunteer records you can manage in Volgistics, the number of [archived \[pg:0709\]](#) volunteer records you can store, the number of [System Operators \[pg:0065\]](#) you can establish, and which of the optional modules (or services) you use. There is an additional monthly rate if you want to use these modules. You can add or drop the optional services any time you choose without any change to your information in Volgistics.

To determine what your account's service level is currently:

1. Choose [Setup \[pg:0887\]](#) from the [menu \[pg:0215\]](#).
2. Click *Account Management*.
3. Click *Account Status*.

### Non-archived volunteer records

Your service level determines the maximum number of non-archived volunteer records you can manage. Non-archived volunteers are your volunteers who are actively serving. Non-archived records can have service recorded, they can be placed on the schedule, they can receive messages, be grouped together by adding [tags \[pg:1529\]](#), and they can appear in all reports.

You can [increase or decrease this service level \[pg:0731\]](#) at any time. However, you cannot decrease it to a number that is smaller than the number of volunteer records currently in your database. For example, you cannot decrease your service level to 500 volunteer records if your account currently contains more than 500 volunteer records.



## Archived volunteer records

Your service level determines the maximum number of volunteer records you can store in the Volgistics archive. Archived volunteer records are those you store for inactive or former volunteers. Archived records cost much less than non-archived records on a record-by-record basis because they have more limited functionality. For example, archived records cannot be scheduled, they cannot use the optional [VicNet \[pg:1724\]](#) and [VicTouch \[pg:1778\]](#) modules, they cannot receive messages, and they cannot be tagged. You can learn more about the differences in archived and non-archived records in [help topic 1999 \[pg:0709\]](#).

You can move records between the archived and non-archived sections at any time. When you move a record from the non-archived section to the archived section, the number of records in your non-archived section decreases by one. When you restore an archived record to the non-archived section, the number of non-archived records increases by one.

You can [increase or decrease this service level \[pg:0731\]](#) at any time. However, you cannot decrease it to a number that is smaller than the number of archived volunteer records currently in your database. For example, you cannot decrease your service level to 500 archived volunteer records if your account currently contains more than 500 archived volunteer records.

## System Operators

Volgistics comes with room for two [System Operators \[pg:0065\]](#). You can add additional System Operators at any time. You can decrease this service level too. However, you cannot decrease it to fewer than two, or fewer than the number of operators currently setup in your account. For example, you cannot decrease your System Operator count to four operators if you currently have five or more operators setup in your database. See [Delete a System Operator \[pg:1441\]](#) for instructions on deleting old System Operator records.

## Optional Modules

Volgistics includes three optional modules that you can add to your service level depending on your organization's needs. Some organizations do not use any of the optional modules, some use just one or two, and others use all three. You can learn more about these modules in the following help topics:

[VicDocs \[pg:1648\]](#)

[VicNet \[pg:1724\]](#)

[VicTouch \[pg:1778\]](#)

## Price Calculator

Volgistics has an online calculator you can use to determine the monthly service fee for different service levels. You can find this calculator [here](#).

You can also find a chart that breaks down the prices for each area of the service level in [help topic 2002 \[pg:0710\]](#).

**Please note:** Most of our customers are not-for-profit organizations involved in a wide range of important community service, health care, recreational, educational, cultural, and civic endeavors. Our service fees are set with the fiscal realities common to not-for-profits in mind. While some for-profit organizations also use the service, they typically do so as part of outside philanthropic efforts. For these reasons the Volgistics service fees are the same for all.

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## How can I get an invoice for the service fee?

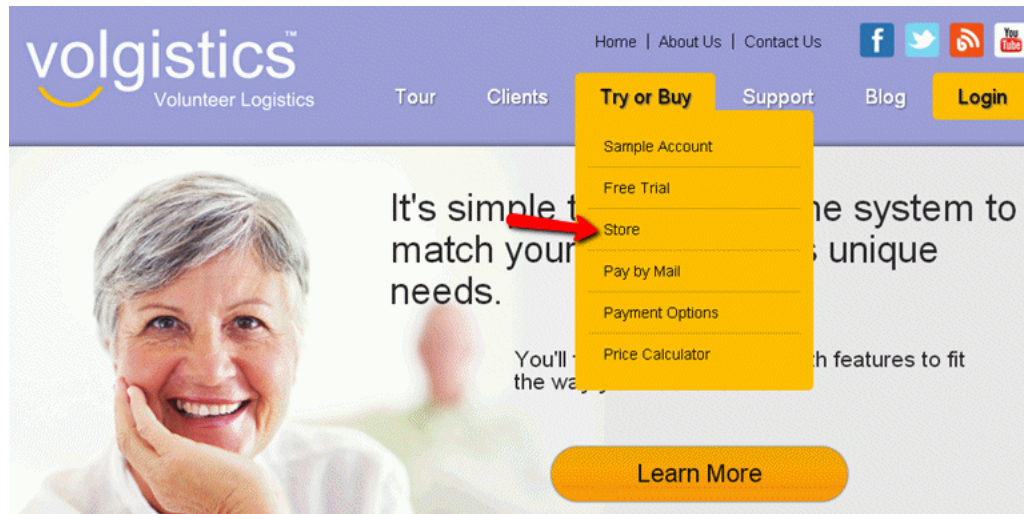
Help topic 2071

Added or revised 05-21-2015

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If you have a trial account, or a paid account within one year of expiration, you can obtain an Order-Invoice for Volgistics like this:

1. Visit [www.volgistics.com](http://www.volgistics.com).
2. Hover over Try or Buy in the menu at the top of the page and select Store.



3. Enter your Volgistics account number and your account credentials. Your account credentials may be either a [Volgistics Administrator's \[pg:0052\]](#) login name and password, or your account's [Accounting access code \[pg:0728\]](#).
4. Do one of the following depending on your situation:
  - If your account is a paid account you may already have an Order-Invoice pending. In this case, you may print this by clicking the "Printable view" link.
  - If you do not have an Order-Invoice pending, select the "Create an invoice and extend your service" link to create an Order-Invoice.
  - If you have a trial account, or a paid account setup for the "Automatic payment" method, choose the "Pre-payment" method to obtain an Order-Invoice.

### Please Note

If you already have an outstanding Order-Invoice but need to change it, click the "Cancel Order-Invoice" link. You can then follow the steps above to create a new Order-Invoice.

Selecting a service level on your invoice that is different than your account's current service level will **not** always change your account's service level. You may need to complete the steps shown in [Help Topic 2166 \[pg:0731\]](#) after payment is made to complete the process of changing your service level.

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## How can I get a receipt for a payment?

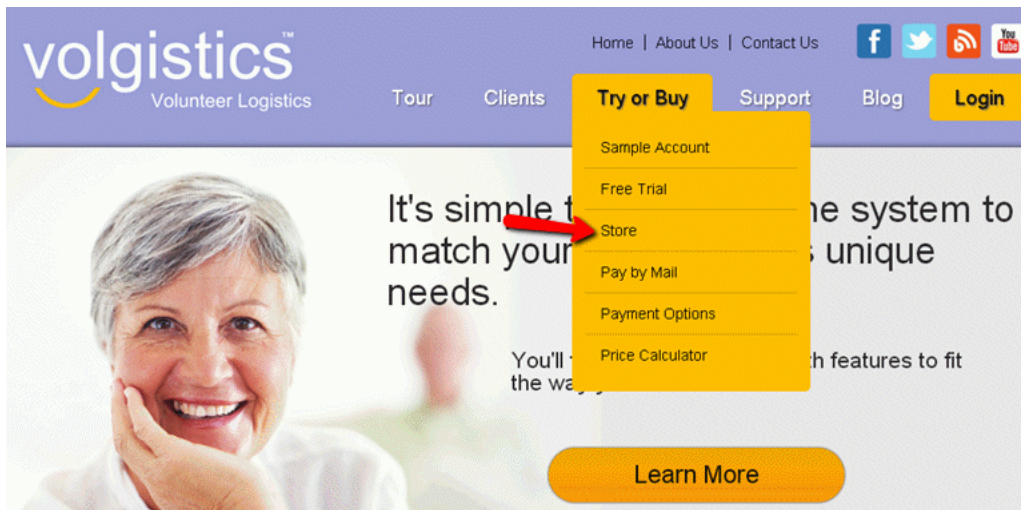
Help topic 2072

Added or revised 05-21-2015

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There is not a way for Volgistics to send receipts for payments through the online support channel. However, you can get a receipt for payments in the secure Volgistics Store for your account like this:

1. Visit [www.volgistics.com](http://www.volgistics.com).
2. Hover over Try or Buy in the menu at the top of the page and select Store.



3. Enter your Volgistics account number and your account credentials. Your account credentials may be either a [Volgistics Administrator's \[pg:0052\]](#) login name and password, or your account's [Accounting access code \[pg:0728\]](#).
4. Select the "Order and payment history" link under "Store Options."

## Store Options

- Account status
- Create an invoice and extend your service (make another pre-payment)
- Switch payment method to Automatic payment
- Order and payment history 
- Change service level
- Change billing contact email address

Exit Store

5. Click on the thumbnail image of the receipt you need.

You can save the receipt to your local computer or print a copy of it using your web browser.

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## Has my payment arrived?

Help topic 2074

Added or revised 05-21-2015

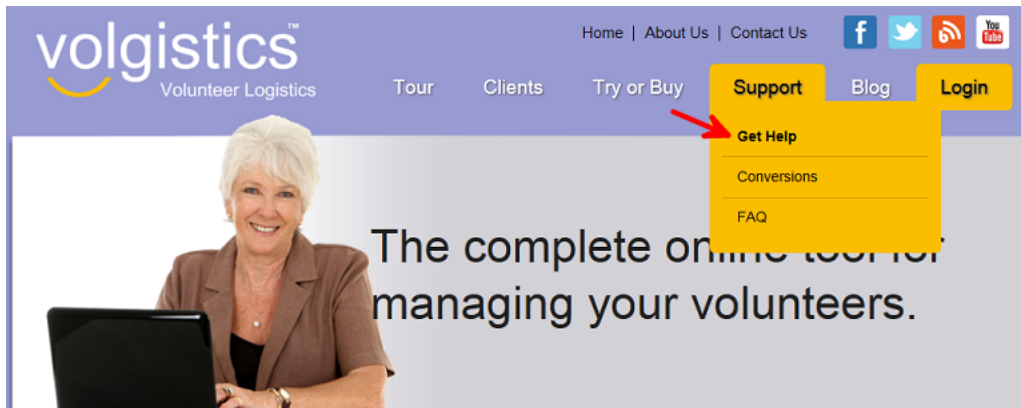
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When a payment for the Volgistics [service fee \[pg:0710\]](#) is made by [mail \[pg:0737\]](#), the check is transferred to our Accounting Department when it arrives. Payments are applied to your account within 2 business days of the date they are received by our Accounting Department as long as the payment includes your account number or a Volgistics [Order-Invoice \[pg:0721\]](#) number. An email confirmation is sent to your organization's [billing contact \[pg:0706\]](#) as soon as the payment is applied. You will also see the payment listed on the *Order and payment* history page in the Volgistics Store.

Note that for faster service, you can activate or extend an account without delay by making your payment online by electronic check or credit card rather than through the mail (see [Volgistics Payment Options \[pg:0733\]](#) for details). Accounts paid online are activated or extended as soon as you make your payment.

Occasionally check payments arrive without an account number, Order-Invoice number, or clear indication of what organization the payment is for. Because there is not a way for us to know which Volgistics account these payments are for, we must hold these checks until the payer and their account number are determined.

If you believe a payment you sent should have arrived by now, and there is a possibility that the payment may have been sent without an account number or an Order-Invoice number, please post a help inquiry from [within your Volgistics account \[pg:0184\]](#), or by hovering over Support on the menu at [www.volgistics.com](#) and selecting "Get Help."

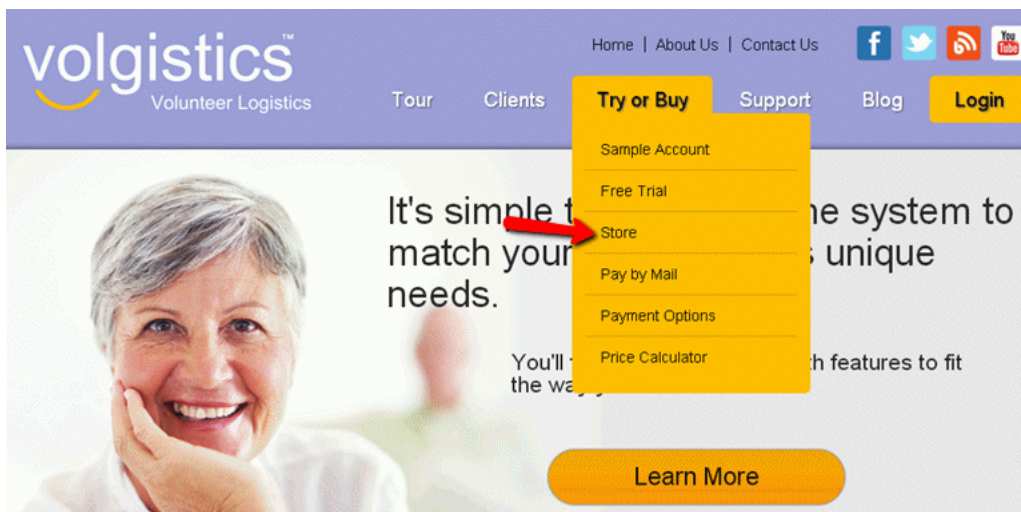


Your inquiry should include:

- The Volgistics account number your payment should be applied to.
- The check number of the check you sent.
- The amount of the check you sent.
- Your name and email address.

### How Volgistics Administrators, or accounting operators, can update their organization's billing contact email address

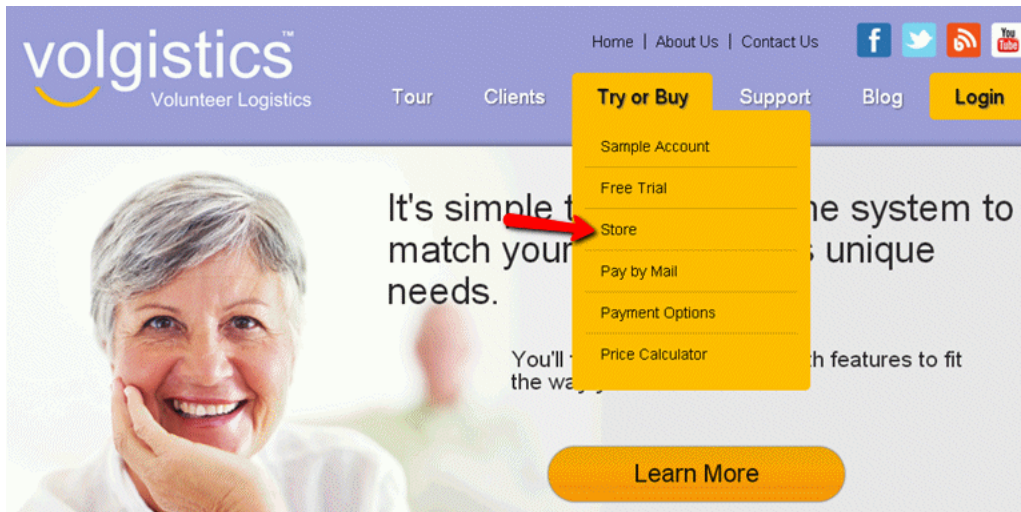
1. Visit [www.volgistics.com](http://www.volgistics.com).
2. Hover over Try or Buy on the menu at the top of the page and select the Store option.



3. Enter your nine digit Volgistics account number.
4. Enter the login name and password for a [Volgistics Administrator \[pg:0052\]](#), or the [accounting access code \[pg:0728\]](#) for your account, and then click the **Continue** button.
5. Click the "Change billing contact email address" link and then follow the instructions on that page.

## How Volgistics Administrators, or accounting operators, can view their account's transactions

1. Visit [www.volgistics.com](http://www.volgistics.com).
2. Hover over Try or Buy on the menu at the top of the page and select the Store option.



3. Enter your nine digit Volgistics account number.
4. Enter the login name and password for a [Volgistics Administrator \[pg:0052\]](#), or the [accounting access code \[pg:0728\]](#) for your account, and then click the **Continue** button.
5. Click the "Order and payment history" link.
6. Click on the thumbnail image of any Receipt or Order-Invoice to see more details.

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## How do I update or change my credit card information?

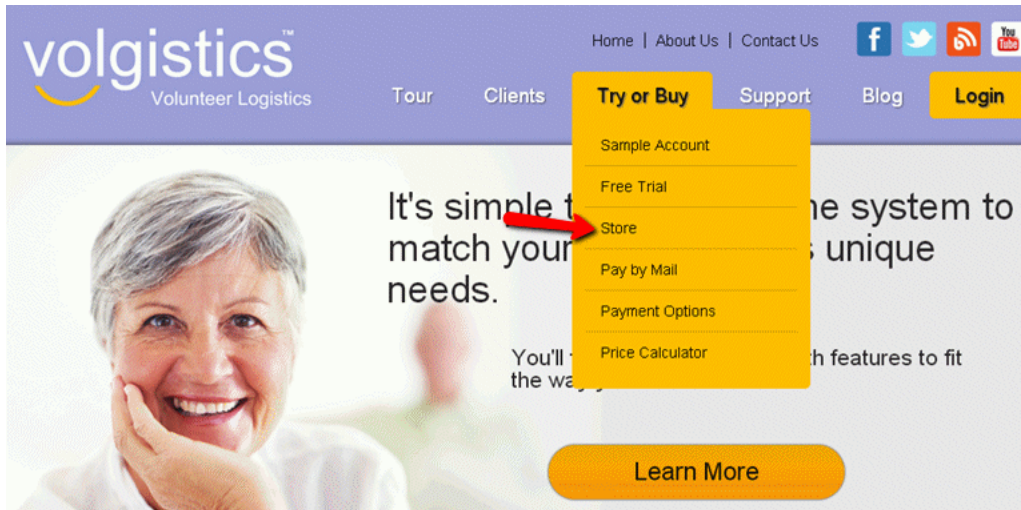
Help topic 2091

Added or revised 05-21-2015

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If you have credit card information on file and need to update the information or switch to a different card, you can do this in the secure Volgistics Store for your account. To do this:

1. Visit [www.volgistics.com](http://www.volgistics.com).
2. Hover over Try or Buy in the menu at the top of the page and select Store.



3. Enter your Volgistics account number and your account credentials. Your account credentials may be either a [Volgistics Administrator's \[pg:0052\]](#) login name and password, or your account's [Accounting access code \[pg:0728\]](#).

4. Select the "Switch to a different credit card, or update credit card information" link under the "Store Options" heading.

## Store Options

- Account status
- Order and payment history
- Change service level
- Change billing day
- Switch to a different credit card, or update credit card information
- Switch payment method to Pre-payment
- Change billing contact email address

Exit Store

5. Complete all of the fields to enter the card's information.

6. Click the **Save** button.

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## How to Locate Your Credit Card Security Code

Help topic 2120

Added or revised 05-21-2015

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Most credit cards now have a 3 or 4 digit security code printed on the front or back of the card. These numbers provide an additional level of security and identification. You must enter the security code from your credit card in order to complete your transaction.

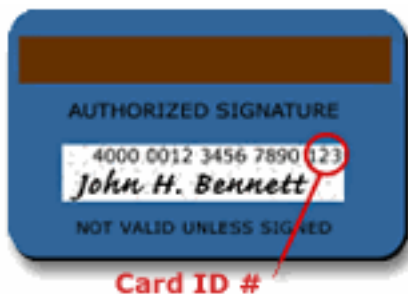
### American Express

Use the four digit, non-embossed number printed above the account number on the face of the card.



### Visa

Use the three digit, non-embossed number printed on the signature panel on the back of the card.



### MasterCard

Include the three digit, non-embossed number printed on the signature panel on the back of the card.





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## Accounting Access Code

Help topic 2143

Added or revised 04-07-2016

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Your Volgistics account includes an *accounting access code*. This code can be used to access the Volgistics Store for your account. You perform these functions in the Volgistics Store:

- Pay your account's service fee online
- Change your account's service level
- Update your account's payment information (such as your credit card expiration date or billing address)
- Switch billing to a different credit card
- Change the email address for your billing contact
- Create Order-Invoices for payments

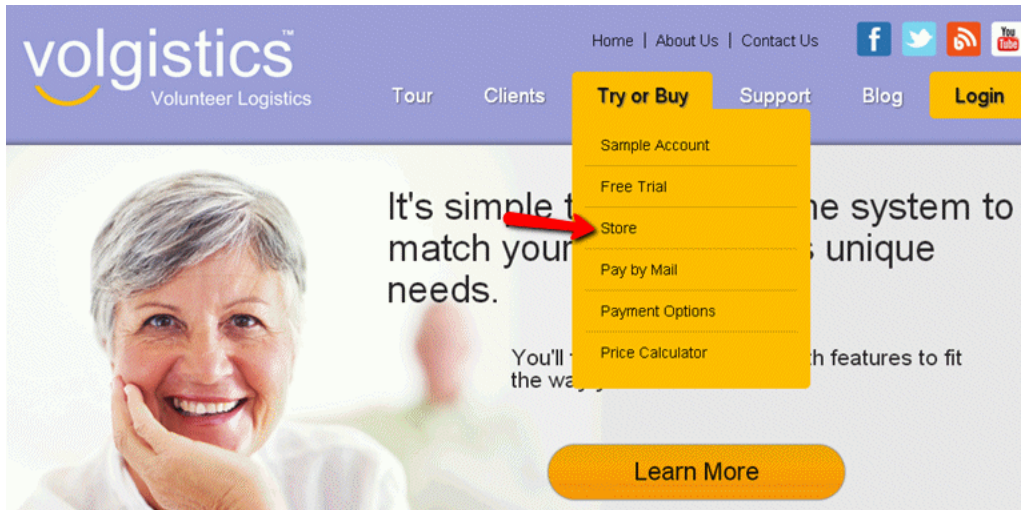
The [Administrators \[pg:0052\]](#) for your Volgistics account can access the Store using their usual Volgistics System Operator credentials (email address and password). The *accounting access code* lets you give a person access to the Volgistics Store who is not setup as a [System Operator \[pg:0065\]](#), or who is a System Operator with a "Power user" or "Basic user" access level.

This is useful because in many organizations the person who makes the payment arrangements for the Volgistics account is someone outside of the volunteer program, such as an accounting office or accounts payable department. The *accounting access code* lets you give this person access to the Volgistics Store, but not your volunteer database.

To find the accounting access code for your account:

1. Select Setup from the [menu \[pg:0215\]](#).
2. Choose "System operators."
3. Click on "Accounting operator."

To give an accounting operator access to the Volgistics Store for your account, give them your nine digit Volgistics account number, plus your *accounting access code*. The Volgistics Store is located at [www.volgistics.com](http://www.volgistics.com). Hover over Try or Buy on the menu at the top of the page and select the Store option.



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## Information For International Customers

Help topic 2145

Added or revised 04-08-2016

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While the Volgistics service is based in the United States of America, Volgistics is well suited to the volunteer tracking and coordination needs of volunteer leaders in many countries around the globe, and we welcome customers from these other nations.

### Privacy

Volgistics protects the privacy of information stored in the system under its strict [Privacy Policy \[pg:0182\]](#), regardless of its nation of origin. Volgistics does not disclose your information, or information you track in Volgistics to anyone, except as required by law. The Privacy Policy is governed by U.S. law.

If your organization is based outside the United States, it is your responsibility to determine if your use of the service is regulated by your local, regional, or national government; and to conform to such regulations or laws as may apply.

### Language

The Volgistics system, its documentation, and our support services are currently presented in the English language.

### Taxes

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# Customer Surveys and Questionnaires

Help topic 2147

Added or revised 02-13-2013

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Prospective customers sometimes ask us to complete surveys or questionnaires about our business; the systems and practices we use to provide our service and its security and privacy provisions; or system features and capabilities.

We understand the need organizations have to ensure that hosted applications meet certain standards, and we are committed to helping organizations in these efforts as they evaluate Volgistics. Because these surveys are frequently similar and often quite extensive, we ask that organizations use our online resources as their first source for information about Volgistics. We provide extensive company, security, privacy, and system information online at these locations:

Security (<https://www.volgistics.com/Security.htm>)

Privacy Policy (<https://www.volgistics.com/Privacy-Policy.htm>)

Reliability (<https://www.volgistics.com/Reliability.htm>)

Terms of Use (<https://www.volgistics.com/Terms.htm>)

Payment Options (<https://www.volgistics.com/Payment-Options.htm>)

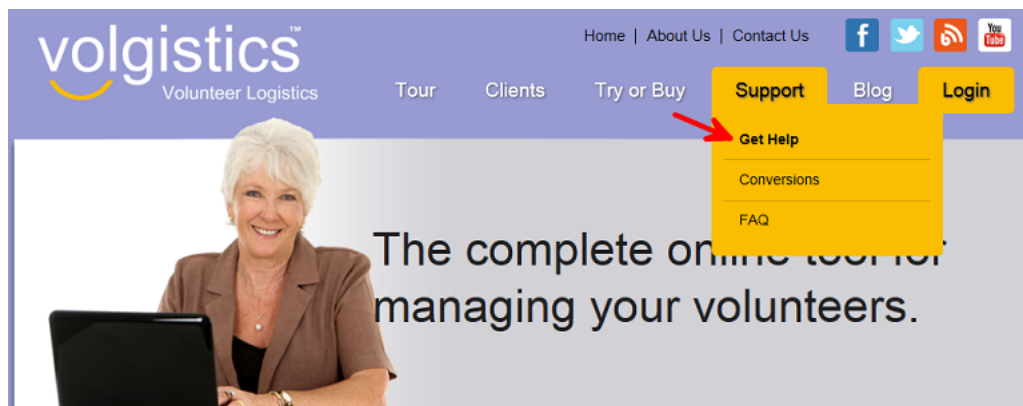
About Us (<https://www.volgistics.com/About-Us.htm>)

Frequently Asked Questions (<https://www.volgistics.com/FAQ.htm>)

Tour (<https://www.volgistics.com/Tour.htm>)

Should your survey seek information you cannot locate in our online resources, you are welcome to submit these questions to us through our support channels. We can also receive surveys and questionnaires as email attachments. Please contact the support team for an email address to submit these to.

You can submit questions or contact the support team by posting a help inquiry from [within your Volgistics account \[pg:0184\]](#), or by hovering over Support on the menu at [www.volgistics.com](http://www.volgistics.com) and selecting "Get Help."



## Related help

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## How do I change the service level on my account?

Help topic 2166

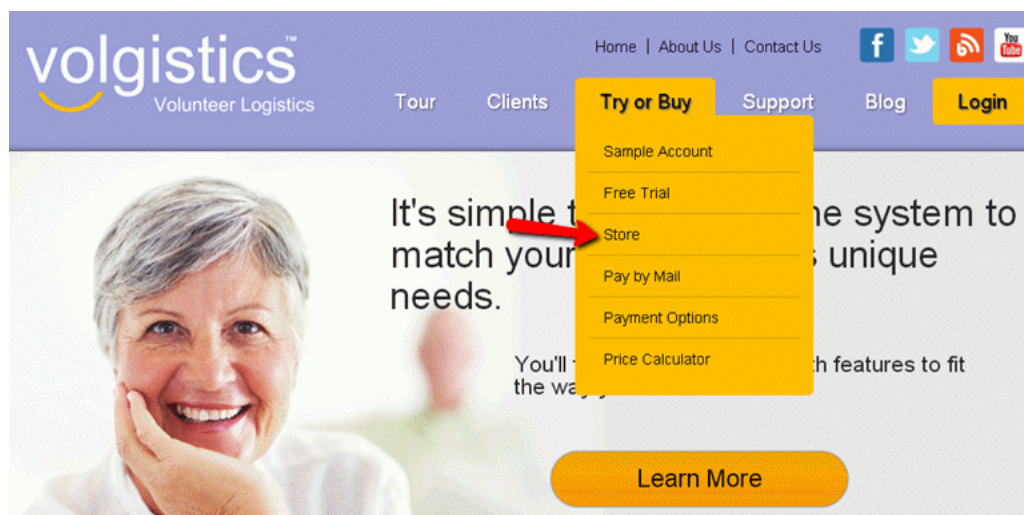
Added or revised 02-11-2016

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Your Volgistics account's [service level \[pg:0719\]](#) is what determines the maximum number of volunteers you can track, the maximum number of [archived \[pg:0709\]](#) volunteer records you can store, the number of [System Operators \[pg:0065\]](#) you can have, and if your account includes the optional [VicTouch \[pg:1778\]](#), [VicDocs \[pg:1648\]](#), or [VicNet \[pg:1724\]](#) features.


You can adjust your account's service level at anytime as your needs change. To change your service level:

1. Visit [www.volgistics.com](http://www.volgistics.com).
2. Hover over Try or Buy in the menu at the top of the page and select Store.



3. Enter your Volgistics account number and your account credentials. Your account credentials may be either a [Volgistics Administrator's \[pg:0052\]](#) login name and password, or your account's [Accounting access code \[pg:0728\]](#).
4. Click the "Change service level" link, and then follow the instructions for changing your service level.

## Store Options

- Account status
- Create an invoice and extend your service (make another pre-payment)
- Switch payment method to Automatic payment
- Order and payment history
- Change service level 
- Change billing contact email address

Exit Store

If the change you need to make is removing VicNet or VicDocs from your account's service level, you may find [help topic 2551 \[pg:0089\]](#) useful also.

### How a change in service level affects your service fee

#### With the automatic payment method

If your account is setup for *Automatic payments*, you can increase or decrease your service level at any time.

If you increase your service level under Automatic payment, Volgistics charges your account a prorated amount to cover the additional service fees for the remainder of the current billing period. Thereafter your account is charged at the new service level fee.

If you decrease your service level under Automatic payment, there is not a refund for the amount already paid. However, Volgistics begins charging your account the new, lower service fee on the next billing date.

#### With the pre-payment method

If your account is setup for *Pre-payment*, you can change your service level at any time. However, if you decrease your service level, your new lower service fee will not apply until your next pre-payment.

If you increase your service level under Pre-payment, Volgistics adjusts your account's expiration date based on the new, higher daily service fee.

If you decrease your service level under Pre-payment, your account's expiration date will not change and the new, lower service fee will apply when you make your next pre-payment.

See the *Additional terms* section of [Help topic 2303 \[pg:0733\]](#) for more details.

### Minimum service levels

You cannot decrease your account's service level to a level that is smaller than the size of your current database. Here are some examples:

- If your account currently includes 500 volunteer records, you cannot change your service to a level that provides space for fewer than 500 volunteer records.
- If your account currently includes 5,000 archived volunteer records, your account's service level must provide space for at least 5,000 archived volunteer records.
- If you currently have 8 System Operators defined (not counting the [Accounting Operator \[pg:0728\]](#)), you cannot choose a service level that has space for fewer than 8 System Operators.

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## Volgistics Payment Options

Help topic 2303

Added or revised 09-30-2016

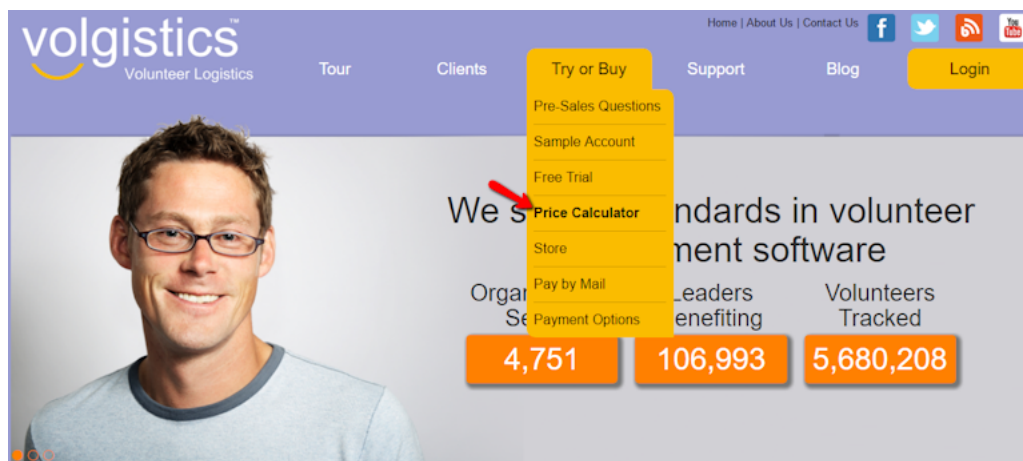
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Organizations pay a monthly service fee to use Volgistics. Your monthly service fee includes around the clock access to Volgistics for up to two [users \[pg:0065\]](#) (or more if you choose); automatic upgrades; automatic data backup; online [application forms \[pg:0413\]](#) and [opportunity directory \[pg:0420\]](#); and [online technical support \[pg:0184\]](#). There are no software, licensing, upgrade, or support charges.

If you use the optional [VicNet \[pg:1724\]](#), [VicTouch \[pg:1778\]](#), or [VicDocs \[pg:1648\]](#) modules, your service fee also includes unlimited around the clock access to these features.

The [service level \[pg:0719\]](#) you choose for your account determines the amount of your monthly service fee. Service levels are based on the number of volunteers you track, the number of System Operators you want, and the VIC options you choose. Service fees start at just \$9 a month. You can adjust your service level (up or down) as your needs change at the secure Volgistics Store.

You can use our Price Calculator to determine the monthly service fee for your organization's needs. To do this, hover over Try or Buy on the menu at the top of the page at [www.volgistics.com](http://www.volgistics.com), and select *Price Calculator*.



### Payment methods

You can pay the monthly service fee for your account in two different ways:

- Automatic payment (credit card)
- Pre-payment (credit card, electronic check, or check)

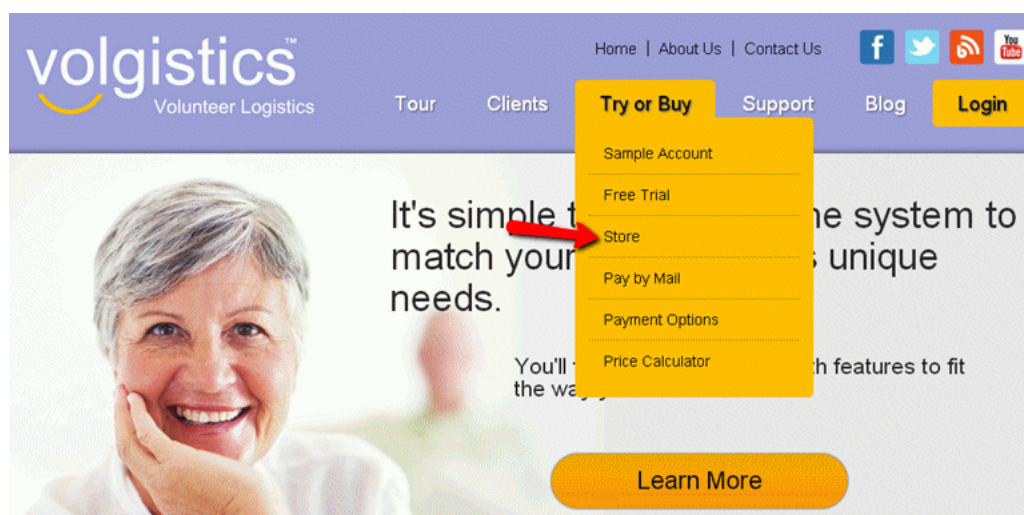
#### Automatic payment

The easiest way to pay is through *Automatic payments* charged to a credit card.

With automatic payments, all you pay to get started is your first month's service fee. Thereafter the service fee is charged automatically to your credit card on a monthly basis. You can cancel at anytime without further cost or obligation. Automatic payments make accounting simple--you don't need to remember to renew your account periodically or request checks. And you can change your service level anytime without entering new payment information.

To start your account using automatic payment:

1. Visit [www.volgistics.com](http://www.volgistics.com).
2. Hover over Try or Buy on the menu at the top of the page and select Store.



3. Enter your nine digit Volgistics account number.
4. Enter the Volgistics login name and password for a [Volgistics Administrator \[pg:0052\]](#), or the [accounting access code \[pg:0728\]](#) for your account, and then click the **Continue** button.
5. Choose the service level you want to start at and then choose *Automatic payments* as your payment method.
6. Provide your credit card information.

Volgistics charges your first month's service fee and activates your account right away. The day of the month you start automatic payments establishes your account's billing date, although you may change your monthly billing date after you start your account. Thereafter, Volgistics charges your credit card monthly on your account's billing date for the next month's service fees.

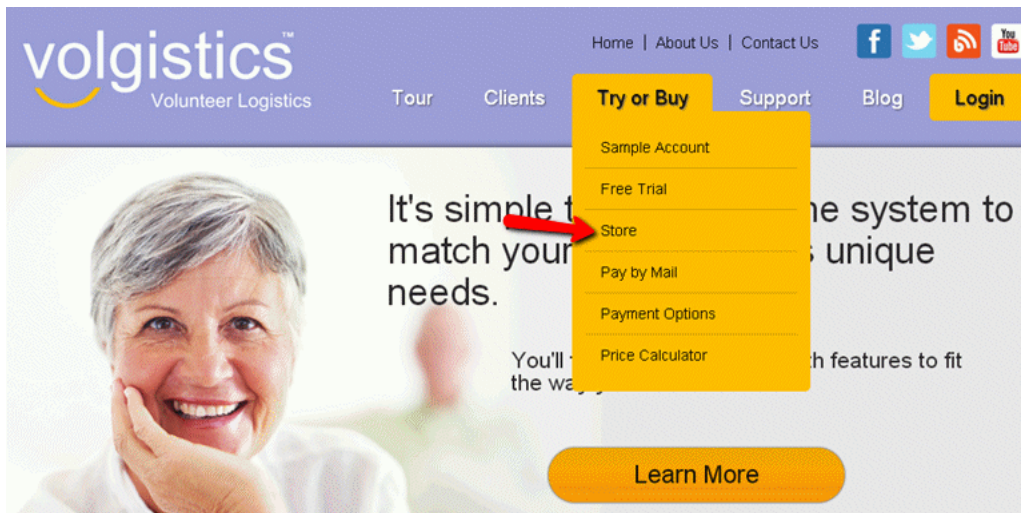
Four days prior to each billing date, Volgistics sends an email reminder to a billing contact that shows the amount to be charged and the date the charge will be made. If you cancel your account before the billing date, Volgistics will not charge your account, and no additional charges will be made. It is your responsibility to ensure that the [billing contact's email address \[pg:0706\]](#) you provide for billing reminders is accurate and up-to-date.

#### Pre-payment

With the *Pre-payment* option, you can pre-pay your service fee by check or credit card. Volgistics does not charge you automatically when you use this payment method.

To start your account with pre-payment:

1. Visit [www.volgistics.com](http://www.volgistics.com).
2. Hover over Try or Buy on the menu at the top of the page and select Store.



3. Enter your nine digit Volgistics account number.
4. Enter the Volgistics login name and password for a [Volgistics Administrator \[pg:0052\]](#), or the [accounting access code \[pg:0728\]](#) for your account, and then click the **Continue** button.
5. Choose the service level you want to start at and then choose *Pre-payment* as your payment method.
6. Choose the number of months you want to pre-pay.
7. Make your pre-payment online by credit card or electronic check; or by mailing a check (payments must be made in U.S. funds).

You can get started with Volgistics right away if you pre-pay online.

If you mail your account payment, follow the [paying by mail instructions \[pg:0737\]](#). If you pay by check, your check will be transferred to our Accounting Department when it arrives. Once your check is received by our Accounting Department, Volgistics activates your account within two business days. Note that payments made online by credit card or electronic check can be processed more quickly than checks mailed to us.

To continue using Volgistics beyond the period you initially pre-pay, you can make additional pre-payments by mail at any time. However, you will not be able to [create an invoice \[pg:0721\]](#) for this until 90 days or less before your current service expires. Online payments can only be made 90 days or less before your current service expires because these require an invoice.

### Switching payment methods

You can switch between the *Automatic payment* and the *Pre-payment* payment methods at any time. Just visit the Volgistics Store and choose the option to change payment methods.



## Online Payment Security

Volgistics uses Secure Sockets Layer (SSL) technology to encrypt all of your personal information, including credit card number and check information, so that it cannot be read as the information travels over the Internet. SSL is the industry standard and among the best software available today for secure online commerce transactions. [Help topic 1014 \[pg:0181\]](#) explains more about how Volgistics protects your information.

### Additional terms

All rates and charges are in U.S. funds. Payments for charges must be made in U.S. funds.

Customers may review their account charges, payments, and service level, or change their service level, at any time.

If you increase your service level under *Automatic payments*, Volgistics charges your account a prorated amount to cover the additional service fees for the remainder of the current billing period. Thereafter your account is charged at the new service fee level. If you decrease your service level, there is not a refund for the amount already paid. However, Volgistics begins charging your account the new, lower service fee on the next billing date.

If you increase your service level under *Pre-payments*, Volgistics adjusts your account's expiration date based on the new daily service fee. If you decrease your service level, there is not a refund for the amount already paid. However, the new, lower rate will apply the next time you pay your service fee.

If a change in service fees is to occur, Volgistics will alert the billing contact for your account at least 30 days in advance. With *Automatic payments*, the new rate is charged beginning on the first billing date following the new rate's effective date. With *Pre-payments*, the new rate applies on the new rate's effective date and the account's expiration date is automatically adjusted based on the new rate.

One way we keep Volgistics rates low is to reduce the cost of collecting service fees. We do this by collecting service fees online, or by check. For this reason we *do not* accept purchase orders as payment for service fees.

Customers may cancel their account and use of the service at anytime using the "Cancel" option under "Account Management" in the Setup area. See [Help topic 2262 \[pg:0894\]](#) for more information. Any service fee already paid (or account credit balances) at the time of cancellation are non-refundable. If you use automatic monthly billing, Volgistics will cease billing your credit card for the monthly service fee when you cancel your account.

## Purchase Orders

While Volgistics does

*not*

accept purchase orders as payment, the Volgistics Store provides a way for organizations that have paper-based payment processing systems to generate invoices with purchase order numbers for their internal payment processing requirements.

When you choose to use the

*Pre-payment*

method, Volgistics creates an Order-Invoice for you.

You can add a purchase order number to any Order-Invoice in the Volgistics Store by using the "Add a purchase order number" option. You can then print a copy of the Order-Invoice to use for internal payment processing.

When the purchase order is approved within your organization, [mail your check \[pg:0737\]](#) to Volgistics or enter an electronic check payment in the Volgistics Store. Volgistics activates or extends your service once the payment is received.

*Please do not send your purchase order to Volgistics.*

Collecting service fee payments by credit card or check is one way we keep the cost of Volgistics low.

**Please note:** Most of our customers are not-for-profit organizations involved in a wide range of important community service, health care, recreational, educational, cultural, and civic endeavors. Our service fees are set with the fiscal realities common to not-for-profit organizations in mind. While some for-profit organizations also use the service, they typically do so as part of outside philanthropic efforts. For these reasons, the Volgistics service fees are the same for all.

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## Paying Your Volgistics Service Fee by Mail

Help topic 2304

Added or revised 02-26-2013

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If you want to send a payment to Volgistics, use the [Pre-payment \[pg:0733\]](#) method and send your check by mail. Your check will be transferred to our Accounting Department when it arrives. Once your check is received by our Accounting Department, Volgistics will activate or extend your account within two business days.

Note that for faster service, you can activate or extend an account without delay by making your payment *online* by electronic check or credit card rather than through the mail (see [payment terms \[pg:0733\]](#) for details). Accounts paid *online* are activated or extended as soon as you make your payment.

### To pay by mail:

1. Visit the Volgistics Store and choose

#### *Pre-payment*

as your account's payment method. When you choose to pay your account with a pre-payment, Volgistics generates an Order-Invoice that you can print in case you need a paper invoice to obtain a check. [Help topic 2071 \[pg:0721\]](#) has detailed directions if you need them.

2. Make your check payable to "Volgistics Inc." Checks must be payable in U.S. funds.
3. Write or print your *Order-Invoice* number on your check.

4. Mail your check to:

Volgistics Inc.

P.O. Box 406  
Wayland, Michigan 49348-0406

5. The billing contact for your account will receive email notification when your check is processed (please allow up to two business days for processing at Volgistics). You can find information on how to check and/or change your billing contact's email address [here \[pg:0706\]](#).

### **To pay by courier service:**

In some cases, organizations need their payment to arrive faster than sending it by mail. If you need to do this, you can send your payment overnight or next day by courier service (such as FedEx or UPS). To do this, follow the same steps shown in the *To pay by mail* section above, but use our physical address in step 4 instead of our remittance address. Our physical address is:

Volgistics  
400 76th Street SW  
Suite 9  
Byron Center, Michigan 49315-8376

### **Avoid delays!**

Be sure your check...

- Includes your Order-Invoice number
- Is payable to "Volgistics Inc."
- Is payable in U.S. funds
- Is sent to the correct address depending on if the payment is being sent by mail or by courier service.

### **Expired trial accounts**

If your free trial has already expired, you may use your expired trial account number to activate your account if payment is received at Volgistics within 120 days of the date the trial expired.

### **Can I mail a purchase order?**

One way we keep Volgistics rates low is to reduce the cost of collecting service fees. We do this by collecting service fees online or by check. For this reason, we do *not* accept purchase orders as payment for service fees.

If you must use a purchase order internally to start the process of obtaining a check, you may print an Invoice for Volgistics that includes a purchase order number. [Help topic 2545 \[pg:0739\]](#) shows how to do this.

You can use this invoice to obtain your check. Once you receive your check, you can process it online or mail it to Volgistics. *Please do not send purchase orders to Volgistics.*

### **Related help**

- [Help Topic 2002 \[pg:0710\]](#) - Volgistics Price List
- [Help Topic 2027 \[pg:0719\]](#) - Service Levels
- [Help Topic 2071 \[pg:0721\]](#) - How can I get an invoice for the service fee?
- [Help Topic 2074 \[pg:0723\]](#) - Has my payment arrived?
- [Help Topic 2166 \[pg:0731\]](#) - How do I change the service level on my account?
- [Help Topic 2303 \[pg:0733\]](#) - Volgistics Payment Options

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## How to Add a Purchase Order Number to an Order-Invoice

Help topic 2545

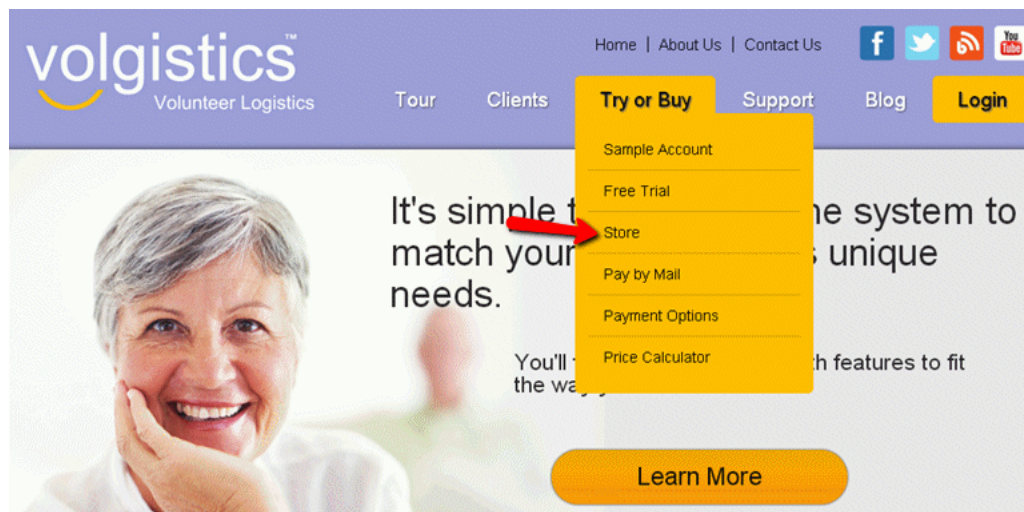
Added or revised 02-13-2017

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While Volgistics does not accept purchase orders as payment, the secure Volgistics Store provides a way for organizations that have paper-based payment processing systems to generate Order-Invoices with purchase order numbers for their internal payment processing requirements.

### To Add a Purchase Order Number to an Order-Invoice

1. Visit [www.volgistics.com](http://www.volgistics.com).
2. Hover over Try or Buy in the menu at the top of the page and select Store.



3. Enter your Volgistics account number and your account credentials and then click the **Continue** button. Your account credentials may be either a [Volgistics Administrator's \[pg:0052\]](#) login name and password, or your account's [Accounting access code \[pg:0728\]](#).
4. Select the "Create an invoice and extend your service" link if you do not already have an invoice in the Store. You must be paying with the [Pre-payment method \[pg:0733\]](#) to see this link. If you already have an invoice, skip to step 6.
5. Select your service level choices, or the checkbox to keep your service level the same, then click the **Continue** button.
6. Select "Add a purchase order number to this Order-Invoice."
7. Type the purchase order number into the box next to "Add purchase order number."
8. Click the **Continue** button. A picture of the invoice will be displayed. The purchase order number will appear in the section below the "Ordered From" and "Ordered By" information. Click the "Printable view" link if you want to print a copy of the Order-Invoice.
9. Select an option under the "What would you like to do?" heading and click the **Continue** button.

*Volgistics activates, or extends, your service once your payment is received. Please do not send your purchase order to Volgistics.*

**Related help**

- [Help Topic 1999 \[pg:0709\]](#) - Archived Versus Non-archived Records
- [Help Topic 2002 \[pg:0710\]](#) - Volgistics Price List
- [Help Topic 2007 \[pg:0050\]](#) - Adding VicNet, VicTouch or VicDocs to Your Account's Service Level
- [Help Topic 2027 \[pg:0719\]](#) - Service Levels
- [Help Topic 2071 \[pg:0721\]](#) - How can I get an invoice for the service fee?
- [Help Topic 2074 \[pg:0723\]](#) - Has my payment arrived?
- [Help Topic 2166 \[pg:0731\]](#) - How do I change the service level on my account?
- [Help Topic 2303 \[pg:0733\]](#) - Volgistics Payment Options
- [Help Topic 2304 \[pg:0737\]](#) - Paying Your Volgistics Service Fee by Mail

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## New Schedule Features

Help topic 1099

Added or revised 07-30-2010

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The Volgistics system has some new and improved volunteer scheduling features. This help topic explains the schedule feature changes introduced July 30, 2010.

[View a video preview](#)

### Track specific tasks or locations on the schedule

The upgrade makes it possible for you to add text notes to schedule openings, and then always have a specific volunteer appear scheduled for the opening that has a given note. This provides greater scheduling control for organizations that need to further define volunteer tasks on the schedule under a single assignment, and then manage which volunteer is assigned to each task.

For example, a blood center that has a 'Bloodmobile driver' assignment can now add blood drive locations to schedule openings for that assignment and then schedule specific volunteers for each location.

Here's an example of how this could look on the schedule:

Friday, July 23, 2010

Printable View Time Sheet View Email

Jul 23 2010 Go Prev day Next day

From	To	Tag	Volunteer	Reg	Sub	Note
8:00 a	1:00 p	<input type="checkbox"/>	Larson, Martha			Evergreen Mall
8:00 a	1:00 p	<input type="checkbox"/>	Bailey, George			Wilson High School

2 volunteers scheduled, 0 unfilled openings

Info Desk (Your Organization's Administration)

Notes added to schedule openings like this will appear in all schedule views, including the Schedule page, the Schedule tabs for assignments and volunteers, and when volunteers or coordinators view the schedule in VicNet and VicTouch. So when the volunteers scheduled for the assignment shown in the example above view their schedule, they'll always see the location they are assignment to as a bloodmobile driver.

Here's another example of how an organization might use schedule notes: An organization schedules openings for four volunteers at a time in a specific assignment, and one of these volunteers is always designated as a 'team leader.' With the upgrade, the volunteer leader can mark one of the four openings as 'Team leader,' and then control which volunteer is scheduled for that specific opening. In addition, everyone who views the schedule will see who is assigned in the 'Team leader' position.

Here's an example of how this might appear:

Friday, July 23, 2010      Jul 23 2010      Go      Prev day      Next day

Printable View      Time Sheet View      Email

	From	To	Tag	Volunteer	Reg	Sub	Note	Opening			
<input type="checkbox"/>	10:00 a	3:00 p						Fill	Close	Edit	Delete
<input type="checkbox"/>	10:00 a	3:00 p						Fill	Close	Edit	Delete
<input type="checkbox"/>	10:00 a	3:00 p						Fill	Close	Edit	Delete
<input type="checkbox"/>	10:00 a	3:00 p				Team leader		Fill	Close	Edit	Delete

0 volunteers scheduled, 4 unfiled openings

### Streamlined schedule opening management

Rather than adding and managing schedule openings on a separate tab in your assignment records, the upgrade provides tools for adding and changing schedule openings right on the schedule tab for each assignment.

You now have the option of automatically removing volunteers who are scheduled for a given opening if you choose to remove that opening from the schedule (previously you must have removed scheduled volunteers separately from openings).

New graphic icons make it easier to see which entries on the schedule are unfiled openings, and which openings have been filled.

- Unfiled schedule opening
- Filled schedule opening
- Scheduled volunteer (who does not fill an opening)

### Coordinator schedule view in VicNet

Coordinators who manage more than one volunteer assignment previously saw a separate calendar for each assignment when they visited the Schedule tab in VicNet. The update consolidated all of a coordinator's assignments into a single calendar, reducing the amount of scrolling previously needed for Coordinators to view each separate calendar.

### Improved calendar views

Calendar views are streamlined to use screen space more efficiently and organize daily schedule information more concisely.

### Improved navigation

Move directly from the Schedule page to a specific assignment's schedule by clicking the assignment name on the schedule.

## Optionally place new applications directly on the schedule

If you use Volgistics to collect online volunteer application forms and you ask applicants to choose their preference for schedule openings on the application, their schedule choices previously appeared first as *schedule preferences* in their volunteer record. Then you could later move volunteers to schedule openings based on their preferences. This process gives volunteer leaders - who want it - final control over where new applicants are ultimately scheduled. However in some volunteer efforts – such as special events – there's no need for this manual step.

While organizations can continue to screen applicant schedule preferences the way they always have if they choose to, the upgrade gives organizations a way to have applicant schedule choices appear directly on the schedule right away without this additional step if they prefer.

### Next

The schedule feature upgrade also completed the database groundwork needed for a series of additional schedule capabilities soon to follow, including the ability to perform group volunteer scheduling; several new printable schedule report formats; and more.

### Related help

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## A scheduled volunteer does not appear to cover a schedule opening

Help topic 1102

Added or revised 07-30-2010

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Previously in Volgistics there was not a permanent link between schedule openings and scheduled volunteers. Instead, whenever you viewed the schedule, Volgistics displayed an opening as filled if there was any volunteer scheduled on a given date for the times of the opening.

This approach to scheduling was helpful in situations where schedule openings had become "fragmented," as shown below, but it caused problems if you wanted to add a note to a *specific* schedule opening and then schedule a specific volunteer for the opening that had the note. For example, if you had four openings for the same times each day and you added the note of "Team Leader" to just one of the openings (because you wanted to show which volunteer would be the Team Leader). Previously there was no way to make a specific volunteer always appear over the opening that had that note, because there was not a permanent link between that schedule opening and a specific volunteer schedule entry.

The July 30th scheduling upgrade introduced permanent links between each schedule opening and the volunteer(s) scheduled for each opening.

This will make volunteer scheduling easier and more powerful going forward, however you may notice that on some dates a volunteer will appear scheduled outside of an opening but with the same times as the opening, as shown here:



Monday, September 6, 2010    Sep ▾ 6 ▾ 2010 ▾    Go    Prev day    Next day

Printable View    Time Sheet View    Email

	From	To	Tag	Volunteer	Reg	Sub	Note	Opening	
	8:00 a	10:00 a	<input type="checkbox"/>	Bailey, George	✓			Edit	Remove
<input type="checkbox"/>	8:00 a	10:00 a						Fill	Close

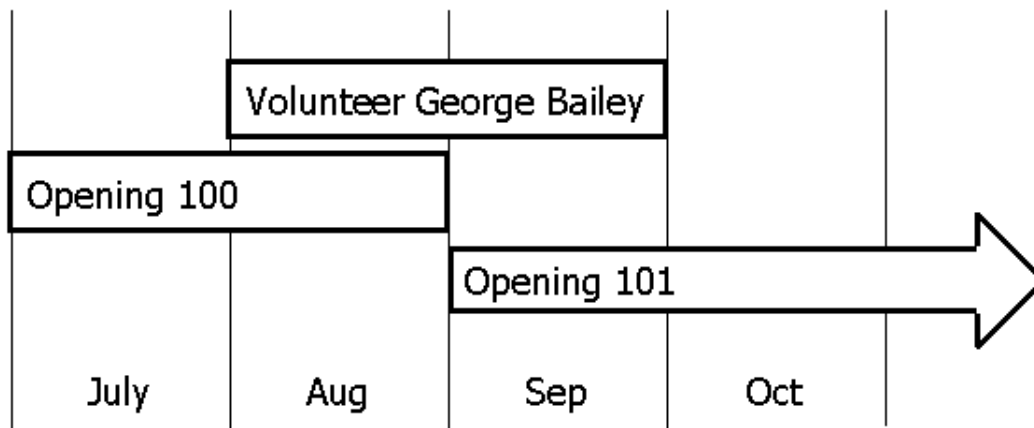
1 volunteers scheduled, 1 unfilled openings    Remove all

Add an opening

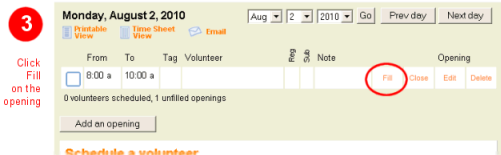
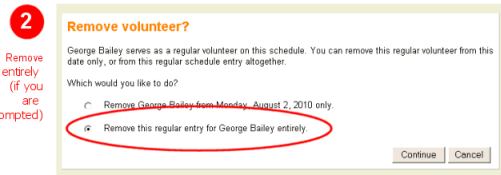
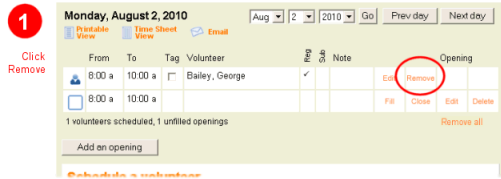
This can happen under a variety of scenarios in which schedule openings have become fragmented (added in separate pieces) over time.

Here's why George Bailey does not appear to be scheduled over the opening in the example shown above: The assignment shown in the example includes two different openings for 8:00 a.m. to 10:00 a.m. The first opening was added to the schedule for July and August; and a second – separate – opening was added for September forward.

George Bailey's schedule entry is for August and September, and it is linked to the first opening (Opening 100 in the illustration below); so if we look at the schedule for September George is *not* shown as filling the opening (Opening 101), because his schedule entry was linked to the first opening, not the second one (a volunteer schedule entry can only be linked to one schedule opening).



If you see this happen on one or more of your schedules you can usually solve the problem by removing the volunteer, clicking the **Fill** link for the opening, and then selecting that volunteer to fill the opening, as shown here:



Another solution may be to adjust the "fragmented" opening(s). In the example we used above you could delete the second opening (Opening 101), and edit the first opening (Opening 100) so it becomes an "Ongoing" opening instead of ending in August (so it's no longer fragmented). The result will still be just one opening, and George Bailey will fill it through September.

## Related help

# Substitute Tracking

Help topic 1167

Added or revised 10-03-2016

In cases where a volunteer will be unable to serve one of their regularly scheduled openings and you want to show that another volunteer will be serving as their substitute, you can use the substitute tracking feature in Volgistics to note the name of a substitute volunteer. The alternative to using this feature would be to first remove a regular volunteer from the schedule for the date they cannot serve, and then to add the substitute volunteer to the schedule for that day only. The substitute tracking feature makes this process easier.

To enable substitute tracking

1. Choose Setup from the menu.
2. Click on Scheduling.
3. Click on Ground rules.
4. Under Additional options, mark the "Use substitute tracking" checkbox.
5. Click Save.

When substitute tracking is turned on your schedule entries will include an additional "Substitute" field.

#### To use the Substitute field

1. Choose Schedule from the menu.
2. Go to the appropriate date.
3. Click the orange Edit link next to a regularly scheduled volunteer on the Schedule.
4. Locate the Substitute field and use the Substitute drop-down list to choose the volunteer who will substitute on that date.
5. Click the Save button to save your change to the schedule entry.

The substitute's name will appear in place of the regularly scheduled volunteer you have replaced when you view the schedule for that date.

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## Scheduling Overview

Help topic 1180

Added or revised 10-18-2016

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Many Volgistics customers frequently use at least some of the system's extensive scheduling features. This help topic serves as an introduction to the Volgistics scheduling features, explaining the scheduling concept, the two ways to schedule volunteers, overall scheduling setup options, setting up schedules for each Assignment, and managing schedules.

### **The Scheduling Concept**

Scheduling lets an organization decide which volunteers will serve in an Assignment during pre-determined times on pre-determined dates. Volgistics offers ways for individuals to view schedules, either from within Volgistics (as a system operator) or at the optional VicNet module (for coordinators and volunteers). System operators can also send [schedule reminders \[pg:0791\]](#) to volunteers and/or coordinators, either automatically each day or month, or manually with an "on-demand" schedule reminder message.

While you can optionally build a schedule for each Assignment you track in Volgistics, some Assignments may not lend themselves to structured scheduling at all. Organizations can decide not to use any of the system's scheduling features for such Assignments, yet they can still build detailed schedules for other Assignments where these features are appropriate.

**Note:** An [Assignment \[pg:0096\]](#) listed on a volunteer's Service tab indicates that the volunteer has been given a role (such as "Assigned") in that Assignment, not that they are scheduled to serve in it. This distinction is important because when a customer wants to

*schedule*

a volunteer to serve in an Assignment, the steps they must take - explained in this help topic - are different from the procedure to [assign \[pg:0193\]](#) a volunteer to an Assignment.

## **Two Ways to Schedule**

There are two ways to schedule volunteers in Volgistics: Volunteers can be added to structured "openings" or scheduled to serve at "any time." While some organizations might only schedule volunteers to serve in openings and other organizations might schedule volunteers often but never create a schedule opening, it is perfectly acceptable for an organization to schedule volunteers in openings for some Assignments and at any time for other Assignments.

### Openings

When you [create a schedule opening \[pg:0776\]](#), it can be for one day only, or it can be an ongoing opening for a particular day of the week or month. Ongoing openings can span a distinct period of time - for example, for a seasonal opening, or they can be indefinite. You can also specify the number of volunteers needed for each opening.

Scheduling volunteers in openings is appropriate if you want volunteers to work only for specific days and times. This is the best option for Assignments where structured schedules are important; and when you need to have a specific number of volunteers scheduled.

You [add a schedule opening \[pg:0776\]](#) on an Assignment's Schedule tab.

### Any time

If a system operator wants to add a volunteer to the schedule for a date and time where no opening has been created, they can do that by completing and saving the fields in a "Schedule a volunteer" box on the organization's overall schedule, a Site, Place, or Assignment's Schedule tab or a volunteer's Schedule tab.

This is the best way to schedule volunteers for Assignments where structured schedules are not needed, such as self-paced or self-directed service; and when the number of volunteers scheduled for any day or time is not important.

## **Overall Scheduling Setup Options**

Several setup options apply to all schedules in Volgistics. Examples include the organization's [hours of operation \[pg:1395\]](#); scheduling intervals (whether volunteers are scheduled every 15 minutes, 30 minutes or every hour); which openings appear as "filled" and which volunteers, based on status changes, should be removed from schedules.

Additional overall schedule setup options include whether or not [schedule conflicts \[pg:1398\]](#) are permitted; schedule notes are used; [substitute tracking \[pg:0745\]](#) is used, and schedule, calendar and time sheet display options.

All of the system-wide scheduling setup options mentioned above can be customized on the [Scheduling Ground Rules \[pg:1392\]](#) page. You can get to the Scheduling Ground Rules page like this:

1. Choose Setup from the menu.
2. Click on Scheduling.
3. Click on Ground Rules.

### **Setting up Schedules for Each Assignment**

In addition to the broad scheduling setup options, each Assignment's schedule can be customized to work differently. System operators can always schedule volunteers for any times (whether or not an opening has been created for that time period) from within Volgistics, volunteers and coordinators can be given different scheduling capabilities for each Assignment if you use VicNet self-scheduling. For example, volunteers can self-schedule for openings only in some Assignments, and for "any times" in other Assignments. In addition, you can control which volunteers are allowed to schedule themselves or be scheduled for each Assignment with VicNet. Both of these settings can be controlled on each Assignment's [Schedule tab \[pg:2006\]](#).

### **Managing Schedules**

As you build a schedule, you will need to know how to view it; print it; add volunteers to it, and remove volunteers from it.

#### To View a Schedule

You can view the overall schedule for all of your Assignments; the schedule for all Assignments under a specific Site or Place, or the schedule for a single Assignment.

#### *To view the overall schedule:*

Choose Schedule from the main menu. You can change the date that is displayed by selecting a different date from the dropdown fields at the top of the tab. You can also choose to view the monthly Calendar format or the time sheet view of the schedule.

#### *To view the schedule for all Assignments at one Site:*

1. Choose Assignments from the main menu.
2. Click on the name of the Site.
3. Go to the Site's Schedule tab.

You can change the date that is displayed by selecting a different date from the dropdown fields at the top of the tab. You can also choose to view the monthly Calendar format or the time sheet view of the Site's schedule.

#### *To view the schedule for all Assignments at one Place:*

1. Choose Assignments from the main menu.
2. Click on the name of the Place.
3. Go to the Place's Schedule tab.

You can change the date that is displayed by selecting a different date from the dropdown fields at the top of the tab. You can also choose to view the monthly Calendar format or the time sheet view of the Place's schedule.

*To view the schedule for one Assignment:*

1. Choose Assignments from the main menu.
2. Click on the name of the Assignment.
3. Go to the Assignment's Schedule tab.

You can change the date that is displayed by selecting a different date from the dropdown fields at the top of the tab. You can also choose to view the monthly Calendar format or the time sheet view of the Assignment's schedule.

To print the Schedule

The Schedule reports described in [help topic 8255 \[pg:0547\]](#) offer the most options for printing your schedules. There are stock reports for printing monthly and weekly schedules in a variety of formats, or you can customize a report to meet your needs. These reports are produced in PDF format so they can be easily shared by email. If your organization uses the [VicNet module \[pg:1724\]](#), you can also post the schedule on the VicNet Home tab. [Help topic 1188 \[pg:1673\]](#) shows how to do this.

If you prefer, you can also use your web browser to print schedules. To do this, navigate so the desired schedule appears on your screen, click the orange "Printable View" link at the top of the page, then print from the new window that contains the schedule in the printable format.

To Add a Volunteer to a Schedule

As stated above, a system operator can either add a volunteer to a schedule opening, or simply schedule a volunteer for any period of time.

*To fill a schedule opening in an Assignment:*

1. Locate the opening on either the overall schedule (by choosing "Schedule" from the main menu and selecting the appropriate date) or on the Assignment's Schedule tab.
2. Click the orange "Fill" link next to the opening.
3. Select the volunteer's name from the Volunteer dropdown field.
4. Click Save.

*To schedule a volunteer for a period of time when an opening has not been created:*

1a. Go to the overall schedule or a Site, Place, or Assignment's Schedule tab, and locate the "Schedule a volunteer" box, or go to a volunteer's Schedule tab and locate the "Add to Schedule" section.

1b. If you are working from the volunteer's Schedule tab: Choose the Assignment you want to schedule the volunteer for, and click Go.

2. In the "Schedule a volunteer" or "Add to schedule" box, complete each field to setup the schedule entry as you would like.

3. Click Save.

### To Remove a Volunteer from the Schedule

1. Locate the schedule entry via the overall schedule, the Assignment's schedule tab, or the volunteer's schedule tab.
2. Click the orange "Remove" link next to the opening.

#### Related help

- [Help Topic 1022 \[pg:1391\]](#) - Holidays
- [Help Topic 1167 \[pg:0745\]](#) - Substitute Tracking
- [Help Topic 1182 \[pg:0750\]](#) - Schedule Notes
- [Help Topic 1197 \[pg:0753\]](#) - Scheduling groups
- [Help Topic 1205 \[pg:0756\]](#) - Schedule Icons
- [Help Topic 2030 \[pg:1991\]](#) - How to Delete Schedule Openings
- [Help Topic 2132 \[pg:0766\]](#) - How to Edit a Schedule Opening
- [Help Topic 2134 \[pg:0773\]](#) - Working with Schedule Preferences
- [Help Topic 2158 \[pg:0776\]](#) - How do I add schedule openings?
- [Help Topic 2170 \[pg:1494\]](#) - VIC self scheduling
- [Help Topic 2235 \[pg:0788\]](#) - Can I schedule regular volunteers for duty every-other week?
- [Help Topic 2258 \[pg:0789\]](#) - Around-the-Clock Scheduling
- [Help Topic 2273 \[pg:0791\]](#) - Schedule Reminders
- [Help Topic 2536 \[pg:0794\]](#) - How to Edit a Schedule Entry
- [Help Topic 2555 \[pg:0797\]](#) - How to Schedule Substitutes for Regularly Scheduled Volunteers

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## Schedule Notes


Help topic 1182

Added or revised 01-26-2017

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There are two types of notes related to the [schedule \[pg:0746\]](#) for your volunteers.

One is a *schedule entry note*. These are notes that are unique to each volunteer and they will only appear for a specific date (or instance) on the schedule.

	From	To	Tag	Volunteer	Reg	Sub	Note	Opening			
<input type="checkbox"/>	10:00 a	3:00 p					Opening Note	Fill	Close	Edit	Delete
<input checked="" type="checkbox"/>	10:00 a	3:00 p		Bargas, Jessica Schedule Entry Note	✓		Opening Note	Edit	Remove	Edit	Delete
<input checked="" type="checkbox"/>	10:00 a	3:00 p	<input type="checkbox"/>	Becker, Anna	✓		Opening Note	Edit	Remove	Edit	Delete
<input type="checkbox"/>											

The other is an

*opening note*

. These notes will appear on every instance of a schedule opening regardless of whether a volunteer is scheduled to fill the opening or not. They will also appear on every date the [opening \[pg:0776\]](#) is setup to occur on.

	From	To	Tag	Volunteer	Reg	Sub	Note	Opening			
<input type="checkbox"/>	10:00 a	3:00 p					Opening Note	Fill	Close	Edit	Delete
	10:00 a	3:00 p	<input type="checkbox"/>	Bargas, Jessica Schedule Entry Note	✓		Opening Note	Edit	Remove	Edit	Delete
	10:00 a	3:00 p	<input type="checkbox"/>	Becker, Anna	✓		Opening Note	Edit	Remove	Edit	Delete

## Schedule Entry Notes

Schedule entry notes can be used for a variety of purposes. For example, if the volunteer will be late on a particular date, a [System Operator \[pg:0065\]](#) or [Coordinator \[pg:0163\]](#) can add a note such as "May be 10 minutes late" to the Notes field on the date the volunteer will be late. Or if the volunteer will need special instructions, a note such as "See Mary Anderson (Room 316) for assistance" can be added.

### Where Schedule Entry Notes Appear

Schedule entry notes will appear in different places depending on your account's setup:

- On the daily view of the schedule for [System Operators \[pg:0065\]](#).
- On the monthly view of the schedule for [System Operators \[pg:0065\]](#) if this is enabled on the [Scheduling Ground Rules \[pg:1392\]](#) page.
- In reports such as [Volunteer List \[pg:0692\]](#) or [Schedule \[pg:0547\]](#) reports if the field is selected on the Fields tab of the report.
- On the daily and monthly views of [Coordinator's \[pg:0163\]](#) *My Schedule* tab in [VicNet \[pg:1724\]](#).
- On the daily and monthly views of the volunteer's schedule in [VicNet \[pg:1724\]](#) and [VicTouch \[pg:1778\]](#).
- On [Schedule Reminder \[pg:0791\]](#) email messages volunteers and [Coordinators \[pg:0163\]](#) receive as long as the field is selected on the reminder's [Setup \[pg:0887\]](#) page. *The notes will not appear on reminders sent by [text \[pg:0352\]](#) message.*

### How to Enter a Schedule Entry Note

When adding a volunteer to the schedule without filling an opening (with the *Schedule a volunteer* box), or when filling an opening (with the *Fill* link and *Fill an opening* box), the Notes field will only appear if the Frequency option is set on *One time*.

Assignment: PACU Aide [Main Hospital/Surgery]

From: 7:00 a to 11:00 a

Frequency:  One time: February 25 2015  Regular:

Sun Mon Tue Wed Thu Fri Sat

If the volunteer is a regularly scheduled volunteer, you will need to click the Edit link on the date you want the note to appear. Then you can use the *Edit a schedule entry* box to add the note.

	From	To	Tag	Volunteer	Reg	Sub	Note	Opening			
	10:00 a	12:00 p	<input type="checkbox"/>	Zimmerman, Elena	✓			Edit	Remove		
	11:00 a	3:00 p	<input type="checkbox"/>	Parker, Louise	✓			Edit	Remove	Edit	Delete

2 volunteers scheduled, 0 unfilled openings Remove all



## Opening Notes

Opening notes are used differently than schedule entry notes. These notes are not volunteer specific and they will appear on every instance where the opening appears on the schedule. One thing they could be used for is to provide information to the volunteer about where they will serve. For example, if you have an assignment called "Bloodmobile Driver" that regularly goes to more than one location, you can note the location with an opening note.

	From	To	Tag	Volunteer	Reg	Sub	Note	Opening			
<input type="checkbox"/>	10:00 a	1:00 p					Middlepointe Mall	Fill	Close	Edit	Delete
<input checked="" type="checkbox"/>	2:30 p	5:30 p	<input type="checkbox"/>	Greenberg, Tiffany			Stoneford Square	Edit	Remove	Edit	Delete
<input type="checkbox"/>	7:00 p	10:00 p					Tangier Outlet Mall	Fill	Close	Edit	Delete
1 volunteers scheduled, 2 unfilled openings								Remove all			

Opening notes can also be used to differentiate one opening slot from others. For example, if you have an assignment called "Advisory Council" that has six volunteers who make up the council, and one who will be the chairperson. In this case, create one opening [pg:0776] with six volunteers needed, and another opening with the same date and time with one volunteer needed and a note for "Chairperson."

<input checked="" type="checkbox"/>	7:00 p	9:00 p	<input type="checkbox"/>	Traylor, Anne		<input checked="" type="checkbox"/>			Edit	Remove	Edit	Delete
<input checked="" type="checkbox"/>	7:00 p	9:00 p	<input type="checkbox"/>	Wells, Mary		<input checked="" type="checkbox"/>			Edit	Remove	Edit	Delete
<input checked="" type="checkbox"/>	7:00 p	9:00 p	<input type="checkbox"/>	Zimmerman, Elena		<input checked="" type="checkbox"/>			Edit	Remove	Edit	Delete
<input checked="" type="checkbox"/>	7:00 p	9:00 p	<input type="checkbox"/>	Castaneda, Deana		<input checked="" type="checkbox"/>	Chairperson		Edit	Remove	Edit	Delete

### Please note

that the Notes field will only appear for schedule related information. With the first example above, you would not be able to track [service](#) [pg:1581] information for volunteer service performed just at the "Middlepointe Mall" location. It would all appear under the "Bloodmobile Driver" assignment. Similarly, in the second example you would not be able to track just hours given by the chairperson. If you need to be able to break this service information out, you will need to make separate assignments instead of just using the opening notes to identify the differences.

### Where Opening Notes Appear

Opening notes will appear in different places depending on your account's setup:

- On the daily view of the schedule for [System Operators](#) [pg:0065].
- On the monthly view of the schedule for [System Operators](#) [pg:0065] if this is enabled on the [Scheduling Ground Rules](#) [pg:1392] page.
- In reports such as [Volunteer List](#) [pg:0692] or [Schedule](#) [pg:0547] reports if the field is selected on the Fields tab of the report.
- On the daily and monthly views of [Coordinator's](#) [pg:0163] *My Schedule* tab in [VicNet](#) [pg:1724].
- On the daily and monthly views of the volunteer's schedule in [VicNet](#) [pg:1724] and [VicTouch](#) [pg:1778].
- On your [volunteer application forms](#) [pg:0413] if you use [Schedule Preference](#) [pg:1343] fields, and the fields are setup to include opening notes.

- On *unfilled* opening slots in the daily and monthly [Schedule Reminder \[pg:0791\]](#) messages for [Coordinators \[pg:0163\]](#) as long as the message is received by email. The opening notes will not appear if the opening slot is filled by a volunteer, or if the message is received by [text \[pg:0352\]](#) message. *Opening notes do not appear at all* in Schedule Reminder messages sent to volunteers.

### How to Enter an Opening Note

You can enter an opening note when you [create an opening \[pg:0776\]](#). To add a note for an existing opening, click the Edit link for the opening to open the *Edit an opening* box.

	From	To	Tag	Volunteer	Reg	Sub	Note	Opening			
<input type="checkbox"/>	9:00 a	5:00 p						Fill	Close	Edit	Delete
<input checked="" type="checkbox"/>	9:00 a	5:00 p	<input type="checkbox"/>	Fryer, Bobbie	✓			Edit	Remove	Edit	Delete
1 volunteers scheduled, 1 unfilled openings										Remove all	

The note will automatically appear on every opening slot (the *Volunteers needed* field), and every date the opening occurs on if the opening is setup to repeat on a regular basis such as every Monday, Wednesday, and Friday.

---

## Scheduling groups

Help topic 1197

Added or revised 02-21-2012

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You can schedule [group volunteers \[pg:1909\]](#) along with individual volunteers in Volgistics. When you add a group to a schedule you'll see an additional *Volunteers* field you can use to record the number of group members who are to be scheduled. This makes it possible for you to schedule multiple group members in a single step.

### Add a group to a schedule

To add a group to a schedule:

1. Select *Volunteers* from the  menu.
2. Find the group record for the Group you want to schedule.
3. Select the *Schedule* tab.
4. Use the **Add to schedule** box to choose the assignment you want to schedule the group for (plus the date you want to schedule the group for if the assignment you select permits scheduling for openings only).

Choose the assignment you want to schedule the group for from the drop-down list

**Add to schedule**

Choose the Assignment you want to schedule this volunteer for, then click **Go**:

Phone Bank [Fund Drive]

**Add**

**Openings for "Phone Bank [Fund Drive]"**  
February 2011

Feb 2011

Sun	Mon	Tue	Wed	Thu	Fri	Sat
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28					

Click any highlighted date to select an opening that day.

If the assignment you select permits scheduling for openings only, click on the date that includes the opening you want to schedule the group for

5. Use the **Add group volunteers** box to choose the number of group members you want to schedule, and their schedule frequency. For example, if you want to schedule ten members of the selected group for the same opening, enter 10 in the Volunteers field as shown here:

**Add group volunteers**

Assignment: Phone Bank [Fund Drive]

From: 6:00 p to 9:00 p (25 volunteers still needed)

Volunteers: **10** (The number of volunteers from this group you want to schedule)

Frequency:  One time: February 24 2011

Regular:

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Every	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1st	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2nd	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3rd	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4th	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5th	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Alternate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Time period: Starting: February 24 2011

Ongoing

Ending: February 24 2011

Note:

If the assignment you are scheduling the group for permits scheduling for openings only, you cannot schedule more volunteers than there are available openings.

6. Click the **Save** button to save the new schedule entry.

**Viewing a group's schedule**

You can view the schedule for a group from the Service tab in the Group's record; or from the Schedule page by choosing Schedule from the menu.

Since **Group records [pg:1909]** are designed for when you do not want to track group members individually, you will not see the names of individual group members when you view the schedule for a date, site, place, assignment, or coordinator. Instead you'll see the group's name listed for each schedule entry for which a member of the group will serve.

When you view the schedule for a group on the Schedule tab in their volunteer record, you'll see one entry for each group member scheduled. In the example shown here, 10 members of the Downtown Rotary are scheduled to server in a "Phone Bank" assignment from 6:00 p.m. until 9:00 p.m. on February 24th:

You'll see one entry on the schedule for each group memberscheduled

February 2011

Feb 2011 Go Prev month Next month

Printable View

Assignment

	From	To	Reg	Sub		
<b>Thursday, February 24, 2011</b>						
Phone Bank [Fund Drive]	6:00 p	9:00 p			Edit	Remove
Phone Bank [Fund Drive]	6:00 p	9:00 p			Edit	Remove
Phone Bank [Fund Drive]	6:00 p	9:00 p			Edit	Remove
Phone Bank [Fund Drive]	6:00 p	9:00 p			Edit	Remove
Phone Bank [Fund Drive]	6:00 p	9:00 p			Edit	Remove
Phone Bank [Fund Drive]	6:00 p	9:00 p			Edit	Remove
Phone Bank [Fund Drive]	6:00 p	9:00 p			Edit	Remove
Phone Bank [Fund Drive]	6:00 p	9:00 p			Edit	Remove
Phone Bank [Fund Drive]	6:00 p	9:00 p			Edit	Remove
Phone Bank [Fund Drive]	6:00 p	9:00 p			Edit	Remove

Click the Remove button to remove a single group member from a schedule

### Remove a group from a schedule

You can remove group members from a schedule by clicking the Remove link that appears on the schedule, as shown above.

Currently, there is not a way to remove all of the members of a group scheduled for a particular assignment in a single click (click the Remove link for each group member you want to remove from the schedule).

### Related help

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## Schedule Icons

Help topic 1205

Added or revised 10-31-2016

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In Volgistics, volunteers can be scheduled in two different ways. They can be scheduled into structured shifts, or "openings," or they can be placed on the schedule for "any times" where they do not fill an opening. [Help topic 1180 \[pg:0746\]](#) explains more about this.

Schedule icons provide a way to quickly identify how volunteers are scheduled. The schedule icons always appear on the daily view of the schedule. You can control whether or not the icons appear on the monthly view of the schedule by:

1. Select [Setup \[pg:0887\]](#) from the menu.
2. Expand the *Scheduling* link.
3. Select *Ground rules*.
4. Check or un-check the box in front of "Include schedule icons" under the *Monthly calendar view options* heading.
5. Click the **Save** button if changes are made.

The following picture shows an example of what the daily view of the schedule may look like for an assignment.

Here is what the icons on the schedule mean:

	9:00 a	10:00 a	<input type="checkbox"/>	Walden, Erin					Edit	Remove		
	9:30 a	11:30 a	<input type="checkbox"/>	Great Lakes Volunteers					Edit	Remove		



A lone figure (or group of figures) shows an individual, or [group \[pg:1909\]](#), volunteer record placed on the schedule without filling an opening slot. Volunteers scheduled by a [System Operator \[pg:0065\]](#) using the "Schedule a volunteer" box will appear like this on the schedule.

	2:00 p	4:00 p							Fill	Close	Edit	Delete
--	--------	--------	--	--	--	--	--	--	------	-------	------	--------

Empty frames on the schedule indicate a schedule opening slot that has not been filled by an individual, or group, volunteer record yet. To create openings, click the

### Add an opening

button on the daily view of an assignment's Schedule tab. The number of slots that appear for an opening is controlled by the number entered in the *Volunteers needed* field. [Help topic 2158 \[pg:0776\]](#) explains more.

	9:00 p	<input type="checkbox"/>	Flores, Iva	✓		<a href="#">Edit</a>	<a href="#">Remove</a>	<a href="#">Edit</a>	<a href="#">Delete</a>
	9:00 p	<input type="checkbox"/>	Louis Brothers Manufacturing	✓		<a href="#">Edit</a>	<a href="#">Remove</a>	<a href="#">Edit</a>	<a href="#">Delete</a>

A frame on the schedule with a lone figure (or group of figures) inside of it shows an individual, or group, volunteer record placed on the schedule as filling an opening slot. Volunteers scheduled by a System Operator clicking the **Fill** link in a row with an unfilled opening slot, and then using the "Fill an opening" box, will appear like this on the schedule.

---

## How to Delete Schedule Openings

Help topic 2030

Added or revised 10-18-2016

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After creating a [schedule \[pg:0746\]](#) you may decide you want to remove, delete or otherwise change the way you have setup your [schedule openings \[pg:0776\]](#). This help topic explains how to reduce or remove openings. If you'd like to make changes to the opening, see [help topic 2132 \[pg:0766\]](#).

Because working with openings can have a dramatic impact on your entire schedule very quickly, we **strongly** recommend reviewing the information in the Tips for Working with Openings section before proceeding to other sections. The sections of the help topics are arranged according to how much impact they will have on your schedule. The top section will have the *least* impact on your overall schedule, and the bottom section will have the *most* impact on your overall schedule.

You can click on a link in the *Contents* box below to go directly to a section of the help topic.

### Contents

Tips for Working with Openings

Reduce the Number of Volunteers Needed on Just One Day

Reduce the Number of Volunteers Needed on Multiple Days

Delete a One Time Opening Completely

Delete an Ongoing Opening but Leave past Schedule

Delete an Ongoing Opening Completely

### Tips for Working with Openings

In Volgistics, openings are used to show the shifts or times when you will need volunteers to perform an [assignment \[pg:0096\]](#) (a job or task) for your organization. You can learn how to create openings for an assignment in [help topic 2158 \[pg:0776\]](#).

Here are some things to keep in mind when you're working with openings.

1. One opening can have multiple slots based on the number you enter in the *Volunteers needed* field when you create the opening. On the daily view of the schedule pictured below, there are two openings. One opening from 8:00 am to 11:30 am with 3 slots, and one opening from 12:00 pm to 3:30 pm with 2 slots.

Monday, April 4, 2016 Apr ▼ 4 ▼ 2016 ▼ Go Prev day Next day

Printable View Time Sheet View Messages

From	To	Tag	Volunteer	Reg	Sub	Note	Opening			
<input type="checkbox"/>	8:00 a	11:30 a					Fill	Close	Edit	Delete
<input type="checkbox"/>	8:00 a	11:30 a					Fill	Close	Edit	Delete
<input checked="" type="checkbox"/>	8:00 a	11:30 a	<input type="checkbox"/>	Fryer, Bobbie	✓		Edit	Remove	Edit	Delete
<input type="checkbox"/>	12:00 p	3:30 p					Fill	Close	Edit	Delete
<input checked="" type="checkbox"/>	12:00 p	3:30 p	<input type="checkbox"/>	Griffin, Deidre			Edit	Remove	Edit	Delete

2 volunteers scheduled, 3 unfilled openings Remove all

Tag these Un-tag these

Add an opening

When you're working with openings, keep in mind that deleting the opening will remove all slots related to that opening.

2. Openings can be setup to take place on one day only (one time), or they can be setup to repeat in a pattern (ongoing). An example of an ongoing opening is one that repeats every Monday, Tuesday, and Wednesday. On the monthly view of the schedule pictured below, the 8:00 am to 11:30 am opening repeats on Mondays, Tuesdays, and Wednesdays, and the 12:00 pm to 3:30 pm opening repeats on Mondays and Tuesdays.

Mon	Tue	Wed
<b>Mar 28</b> <b>4</b> <input type="checkbox"/> 8:00 a - 11:30 a <input type="checkbox"/> 8:00 a - 11:30 a <input checked="" type="checkbox"/> 8:00 a - 11:30 a <span>Bobbie Fryer</span> <input type="checkbox"/> 12:00 p - 3:30 p <input checked="" type="checkbox"/> 12:00 p - 3:30 p <span>Deidre Griffin</span>	<b>Mar 29</b> <b>5</b> <input type="checkbox"/> 8:00 a - 11:30 a <input type="checkbox"/> 8:00 a - 11:30 a <input type="checkbox"/> 8:00 a - 11:30 a <input type="checkbox"/> 12:00 p - 3:30 p <input type="checkbox"/> 12:00 p - 3:30 p	<b>Mar 30</b> <b>6</b> <input type="checkbox"/> 8:00 a - 11:30 a <input type="checkbox"/> 8:00 a - 11:30 a <input checked="" type="checkbox"/> 8:00 a - 11:30 a <span>Bobbie Fryer</span>
<b>11</b> <input type="checkbox"/> 8:00 a - 11:30 a <input type="checkbox"/> 8:00 a - 11:30 a <input checked="" type="checkbox"/> 8:00 a - 11:30 a <span>Bobbie Fryer</span> <input type="checkbox"/> 12:00 p - 3:30 p <input type="checkbox"/> 12:00 p - 3:30 p	<b>12</b> <input type="checkbox"/> 8:00 a - 11:30 a <input type="checkbox"/> 8:00 a - 11:30 a <input type="checkbox"/> 8:00 a - 11:30 a <input type="checkbox"/> 12:00 p - 3:30 p <input type="checkbox"/> 12:00 p - 3:30 p	<b>13</b> <input type="checkbox"/> 8:00 a - 11:30 a <input type="checkbox"/> 8:00 a - 11:30 a <input checked="" type="checkbox"/> 8:00 a - 11:30 a <span>Bobbie Fryer</span>
<b>18</b>	<b>19</b>	<b>20</b>

Keep in mind that deleting an opening will remove it from every day of the week the opening occurs. This will be for all dates in the past as well as all dates in the future.

3. Volunteers can be scheduled to fill an opening for one day only, or on a repeating basis such as every Monday and Wednesday. If a volunteer is scheduled on an ongoing (repeating) basis, the daily schedule will indicate this with a checkmark in the *Reg* column. In the example pictured below, Bobbie Fryer is scheduled on a repeating basis, and Deidre Griffin is only scheduled for one day.



	From	To	Tag	Volunteer	Reg	Sub	Note	Opening			
<input type="checkbox"/>	8:00 a	11:30 a						Fill	Close	Edit	Delete
<input type="checkbox"/>	8:00 a	11:30 a						Fill	Close	Edit	Delete
<input checked="" type="checkbox"/>	8:00 a	11:30 a	<input type="checkbox"/>	Fryer, Bobbie				Edit	Remove	Edit	Delete
<input type="checkbox"/>	12:00 p	3:30 p						Fill	Close	Edit	Delete
<input checked="" type="checkbox"/>	12:00 p	3:30 p	<input type="checkbox"/>	Griffin, Deidre				Edit	Remove	Edit	Delete

2 volunteers scheduled, 3 unfilled openings Remove all

When you're working with openings, keep in mind that deleting an opening, **and** selecting to remove the volunteers scheduled for the opening, will remove volunteers scheduled on an ongoing (regular) basis on every date they're scheduled (both past and future).

4. Openings are not the same as schedule entries. You can think of an opening slot as a container that can hold a schedule entry, but the opening and the schedule entry are still independent of each other. Volunteers can be placed on the schedule without filling an opening slot, they can be placed on the schedule as filling an opening but with different start and/or stop times than the opening, or they can be placed on the schedule as filling the opening with the same start and stop times as the opening.

In the example shown below, Victoria Perry has been placed on the schedule without filling an opening. This creates a schedule entry for Victoria that is not associated with an opening. It's easy to tell she's not filling an opening because the [schedule icon \[pg:0756\]](#) shows a figure without a box around it.

Deidre Griffin has been placed on the schedule as filling an opening. By default, her schedule entry had the same start and stop times as the opening. However, her schedule entry was edited to have different start and stop times than the opening. The schedule entry is still associated with the opening though. It's easy to tell because the [schedule icon \[pg:0756\]](#) shows a figure with a box around it.

<input checked="" type="checkbox"/>	8:00 a	11:30 a	<input type="checkbox"/>	Fryer, Bobbie				Edit	Remove	Edit	Delete
<input type="checkbox"/>	12:00 p	3:30 p	<input type="checkbox"/>	Perry, Victoria				Edit	Remove		
<input type="checkbox"/>	12:00 p	3:30 p						Fill	Close	Edit	Delete
<input checked="" type="checkbox"/>	12:00 p	3:30 p	<input type="checkbox"/>	Griffin, Deidre (12:30 p to 4:00 p)				Edit	Remove	Edit	Delete

3 volunteers scheduled, 3 unfilled openings Remove all

When you're working with openings, keep in mind that schedule entries are independent of openings. A volunteer can be filling an opening, but not be scheduled for the same start and stop times as the opening. Also, if you delete an opening you can choose to leave volunteers on the schedule. In this case, they will on the schedule but not as filling the opening like Victoria Perry in the example above.

### Reduce the Number of Volunteers Needed on Just One Day

One opening can have multiple opening slots as noted in the Tips for Working with Openings section above. You may want to reduce the number of slots for the opening on just one day. For example, if you anticipate that fewer volunteers will be needed on that day. Here are the steps to take if you need to do this:

1. Choose Assignments from the [menu \[pg:0215\]](#).
2. Click on the Assignment where you want to reduce the number of volunteers needed.
3. Click on the Schedule tab.
4. If you are on the monthly calendar view, click on the date the opening is on. If you're in the daily view, use the date dropdown at the top to select the date and then click the **Go** button.
5. If volunteers are scheduled to fill the opening slot, you will need to remove the volunteer from the schedule first. To do this, click the *Remove* link in the row that shows the volunteer you need to remove.

	From	To	Tag	Volunteer	Reg	Sub	Note	Opening			
<input type="checkbox"/>	8:30 a	11:30 a						Fill	Close	Edit	Delete
<input type="checkbox"/>	8:30 a	11:30 a						Fill	Close	Edit	Delete
	8:30 a	11:30 a	<input type="checkbox"/>	Griffin, Deidre				Edit	Remove	Edit	Delete
	8:30 a	11:30 a	<input type="checkbox"/>	Perry, Victoria	✓			Edit	Remove	Edit	Delete
2 volunteers scheduled, 2 unfilled openings											Remove all

If the volunteer is a regularly scheduled volunteer (shown with a check in the *Reg* column), select to remove them from one day only or from all days they are scheduled for. If you remove them from one day only, you will see their name grayed out on the schedule with *(removed)* behind it.

6. Click the *Close* link in the row for the opening slot you no longer need.

	From	To	Tag	Volunteer	Reg	Sub	Note	Opening			
<input type="checkbox"/>	8:30 a	11:30 a						Fill	Close	Edit	Delete
<input type="checkbox"/>	8:30 a	11:30 a						Fill	Close	Edit	Delete
<input type="checkbox"/>	8:30 a	11:30 a						Fill	Close	Edit	Delete
<input type="checkbox"/>	8:30 a	11:30 a		(closed)				Open		Edit	Delete
	8:30 a	11:30 a	<input type="checkbox"/>	Perry, Victoria (removed)	✓			Return			
0 volunteers scheduled, 3 unfilled openings											Return all

The opening slot will appear grayed out, and there will be an *Open* link to click if you want to make the opening slot available again.

7. Repeat these steps for each opening slot you need to close.

### Reduce the Number of Volunteers Needed on Multiple Days

As noted in the Tips for Working with Openings section above, an opening can be setup to repeat in a pattern such as on every Monday, Tuesday, and Wednesday. You may want to reduce the number of slots for the opening on every day it occurs. For example, if you found you routinely only need two volunteers to do a job instead of four. This section shows the steps you'll need to take to reduce the number of volunteers needed on every day that the opening occurs.

## Please Note!

There is not a way to reduce the number of opening slots for just one day of the week. For example, if the opening repeats every Monday, Tuesday, and Wednesday with four slots on each day, there is not a way to change just Tuesdays to have two slots but leave four slots on Mondays and Wednesdays.

If you only need to make this change for a few Tuesdays, just follow the steps in the

### Reduce the Number of Volunteers Needed on Just One Day

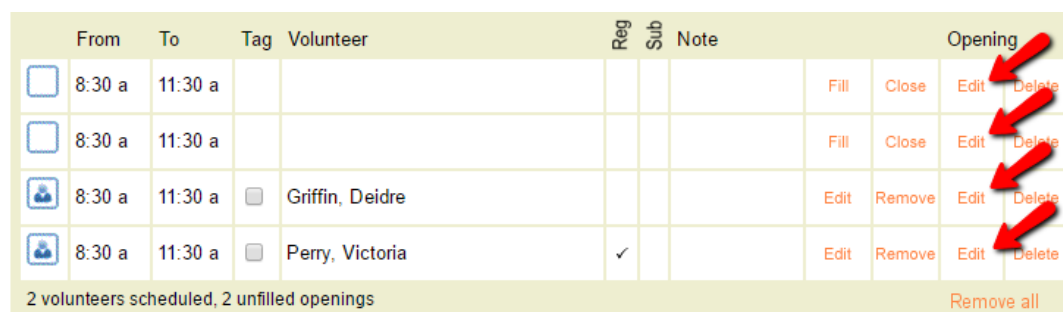
section above to reduce the number of opening slots on those days. If you need to make a permanent change for all Tuesdays, you will need to edit the original opening to take place on just Mondays and Wednesdays. Then, [make a new opening \[pg:0776\]](#) that repeats every Tuesday with just two slots. If you do this, any volunteers scheduled on Tuesdays will be left on the schedule, but not as filling an opening slot. You will need to go back and remove them from the schedule, and then place them back on as filling an opening slot.

Here are the steps to take to reduce the opening slots on *every* day that the opening occurs:

1. Choose Assignments from the [menu \[pg:0215\]](#).
2. Click on the Assignment where you want to reduce the number of volunteer needed.
3. Click on the Schedule tab.
4. If you are on the monthly calendar view, click any date the opening occurs on. If you're in the daily view, use the date dropdown at the top to select a date the opening occurs on, and then click the **Go** button.
5. Click the *Edit* link in the Opening column for any row of the opening's slots. If a volunteer is scheduled to fill the opening slot, this will be the *Edit* link on the right.

	From	To	Tag	Volunteer	Reg	Sub	Note	Opening			
<input type="checkbox"/>	8:30 a	11:30 a						Fill	Close	Edit	Delete
<input type="checkbox"/>	8:30 a	11:30 a						Fill	Close	Edit	Delete
<input checked="" type="checkbox"/>	8:30 a	11:30 a		Griffin, Deidre				Edit	Remove	Edit	Delete
<input checked="" type="checkbox"/>	8:30 a	11:30 a		Perry, Victoria		✓		Edit	Remove	Edit	Delete

2 volunteers scheduled, 2 unfilled openings Remove all



6. In the *Edit an opening* box, change the number in the *Volunteers needed* field to be the number of opening slots you want the opening to have now.
7. Click the **Save** button.

## Please Note!

Following the steps above could leave volunteers on the schedule but not as filling an opening slot. For example, if you reduced the number of opening slots from four to two, and there is a date where three volunteers were

scheduled to fill opening slots, there will now be two volunteers filling opening slots and one volunteer on the schedule who is not filling an opening slot.

### Delete a One-Time Opening Completely

There may be times when you need to completely eliminate an opening that occurs on one date. For example, if a board meeting was switched to a different date. If you are sure you want to delete all slots for a one-time opening on the date it occurs, follow these steps:

1. Choose Assignments from the [menu \[pg:0215\]](#).
2. Click on the Assignment where you want to delete an opening.
3. Click on the Schedule tab.
4. If you are on the monthly calendar view, click on the date the opening is on. If you're in the daily view, use the date dropdown at the top to select the date and then click the **Go** button.
5. You may wish to verify that the opening is a one-time opening instead of an ongoing opening. If you want to do this, click the *Edit* link in any row for the opening you wish to delete. If a volunteer is scheduled to fill the opening slot, this will be the *Edit* link on the right side.

	From	To	Tag	Volunteer	Reg	Sub	Note	Opening			
<input type="checkbox"/>	7:00 a	10:30 a						Fill	Close	<b>Edit</b>	Delete
<input type="checkbox"/>	7:00 a	10:30 a						Fill	Close	Edit	Delete
	7:00 a	10:30 a	<input type="checkbox"/>	Landers, Sandra				Edit	Remove	Edit	Delete

Check in the *Edit an opening* box to see if the opening is setup as *For one day only* or *Ongoing*. If it is setup as *Ongoing* see the *Delete an Ongoing Opening Completely* section of this help topic.

6. Once you verify that the opening is a one-time opening and you are sure you wish to delete it, click the *Delete* link in one of the rows for the opening's slots.

7. If no volunteers are scheduled to fill any of the opening's slots, the opening will be deleted.

If there are volunteers with a schedule entry associated with the opening, a *Delete Opening?* box will appear. Select to either delete the opening *and* the volunteers scheduled to fill the opening, or to delete the opening but leave scheduled volunteers on the schedule as not filling an opening.

8. Click the **Continue** button if you made a selection in step 7 and wish to proceed with deleting the opening. Click the **Cancel** button if you no longer wish to delete the opening.

### Delete an Ongoing Opening but Leave past Schedule

There may be times when you want to end an ongoing opening, but leave the past schedule for the opening intact. For example, if a shift will occur at new times it is sometimes easier to end the old opening and enter a new opening with the new times. *Following these steps can have an impact on your overall schedule. Please review the information in the **Please Note!** box below before proceeding.*

If you'd like to end an ongoing opening, but leave the past schedule intact, follow these steps:

1. Choose Assignments from the [menu \[pg:0215\]](#).
2. Click on the Assignment where you want to delete an opening.
3. Click on the Schedule tab.
4. If you are on the monthly calendar view, click on the date you want to end the opening on. If you're in the daily view, use the date dropdown at the top to select the date and then click the **Go** button.
5. Click the *Edit* link in any row for the opening you wish to end. If a volunteer is scheduled to fill the opening slot, this will be the *Edit* link on the right side.

	From	To	Tag	Volunteer	Req	Sch	Note	Opening			
<input type="checkbox"/>	7:00 a	10:30 a						Fill	Close	<b>Edit</b>	Delete
<input type="checkbox"/>	7:00 a	10:30 a						Fill	Close	Edit	Delete
	7:00 a	10:30 a	<input type="checkbox"/>	Landers, Sandra				Edit	Remove	<b>Edit</b>	Delete

6. In the *Edit an opening* box, change the setting under the *Starting* date field from *Ongoing* to *Ending*. Select the date you want the opening to end from the dropdown lists.

Alternate

Starting: May ▼ 20 ▼ 2016 ▼

Ongoing

Ending: May ▼ 4 ▼ 2016 ▼

Note:

Volunteers needed:

Opening number 146

Save Cancel

7. Click the **Save** button.

### Please Note!

- 1.

Following these steps will remove all future instances of the opening, but it will not remove volunteers who are scheduled to fill the opening in the future. You will need to remove these volunteers individually if you do not want them on the schedule.

- 2.

If you want to remove volunteers from the future schedule, but leave their past schedule intact, you will need to edit their schedule entry and put in an ending date.

### 3.

If you want to remove the volunteers from the schedule completely (for the past and future), simply remove them from the schedule.

### 4.

This section of the help topic can be used to preserve the past schedule for volunteers, but this does *not*

mean the past schedule is recorded as volunteer service. Service hours must be entered using one of the methods shown [here \[pg:1568\]](#)

5. Volgistics does not maintain schedule information indefinitely. The schedules for past years drop from the system. If you want a permanent record of when volunteers served, you must enter service hours.

## Delete an Ongoing Opening Completely

There may be times when you want to completely delete an ongoing opening. Remember to review the information in the Tips for Working with Openings section above before taking this action! *Deleting an ongoing opening will delete **all** instances of the opening on dates in the past as well as in the future. Also, deleting the opening will remove **all** opening slots for the opening on **every** date the opening occurs.*

If you are sure you want to delete all slots for an ongoing opening on each date it occurs (past and future), follow these steps:

1. Choose Assignments from the [menu \[pg:0215\]](#).
2. Click on the Assignment where you want to delete an opening.
3. Click on the Schedule tab.
4. If you are on the monthly calendar view, click on the date the opening is on. If you're in the daily view, use the date dropdown at the top to select the date and then click the **Go** button.
5. Click the *Delete* link in one of the rows for the opening's slots.

	From	To	Tag	Volunteer	Reg	Sub	Note	Opening			
<input type="checkbox"/>	8:30 a	11:30 a						Fill	Close	Edit	Delete
<input type="checkbox"/>	8:30 a	11:30 a						Fill	Close	Edit	Delete
	8:30 a	11:30 a	<input type="checkbox"/>	Griffin, Deidre	✓			Edit	Remove	Edit	Delete
	8:30 a	11:30 a	<input type="checkbox"/>	Perry, Victoria	✓			Edit	Remove	Edit	Delete

2 volunteers scheduled, 2 unfilled openings Remove all

6. In the *Delete Opening?* box, select to either delete the opening *and* the volunteers scheduled to fill the opening, or to delete the opening but leave scheduled volunteers on the schedule as not filling an opening.

*Remember that if you choose to delete the volunteers scheduled to fill the opening, that the past and future date the volunteers were scheduled will be deleted.*

7. Click the **Continue** button if you made a selection in step 7 and wish to proceed with deleting the opening. Click the **Cancel** button if you no longer wish to delete the opening.

---

## How to Edit a Schedule Opening

Help topic 2132

Added or revised 10-28-2016

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Once you [add schedule openings \[pg:0776\]](#) to show the shifts or times you need volunteers to perform an [assignment \[pg:0096\]](#), you may find that you need to change the opening. This help topic explains how to do this. If the change you want to make is to delete an opening, or reduce the number of volunteer slots for the opening, we recommend [help topic 2030 \[pg:0758\]](#) instead of this one.

Because working with openings can have a dramatic impact on your entire schedule very quickly, we **strongly** recommend reviewing the information in the Tips for Working with Openings section before proceeding to other sections.

You can click on a link in the *Contents* box below to go directly to a section of the help topic.

### Contents

- Tips for Working with Openings
- Get Started with Editing an Opening
- Change the Times When an Opening Occurs
- Change an Opening's Starting or Ending Dates
- Add, Edit, or Delete an Opening Note
- Change the Number of Volunteers Needed

### Tips for Working with Openings

Here are some things to keep in mind when you're working with openings.

1. One opening can have multiple slots based on the number you enter in the *Volunteers needed* field when you create the opening. On the daily view of the schedule pictured below, there are two openings. One opening from 8:00 am to 11:30 am with 3 slots, and one opening from 12:00 pm to 3:30 pm with 2 slots.

Monday, April 4, 2016 Apr ▼ 4 ▼ 2016 ▼ Go Prev day Next day

Printable View Time Sheet View Messages

From	To	Tag	Volunteer	Reg	Sub	Note	Opening
<input type="checkbox"/>	8:00 a	11:30 a					Fill Close Edit Delete
<input type="checkbox"/>	8:00 a	11:30 a					Fill Close Edit Delete
<input checked="" type="checkbox"/>	8:00 a	11:30 a	<input type="checkbox"/>	Fryer, Bobbie	✓		Edit Remove Edit Delete
<input type="checkbox"/>	12:00 p	3:30 p					Fill Close Edit Delete
<input checked="" type="checkbox"/>	12:00 p	3:30 p	<input type="checkbox"/>	Griffin, Deidre			Edit Remove Edit Delete

2 volunteers scheduled, 3 unfilled openings Remove all

Tag these Un-tag these

Add an opening

When you're working with openings, keep in mind that making a change to an opening (such as editing the opening's times) will make the same change for all slots related to that opening.

2. Openings can be setup to take place on one day only (one-time), or they can be setup to repeat in a pattern (ongoing). An example of an ongoing opening is one that repeats every Monday, Tuesday, and Wednesday. On the monthly view of the schedule pictured below, the 8:00 am to 11:30 am opening repeats on Mondays, Tuesdays, and Wednesdays, and the 12:00 pm to 3:30 pm opening repeats on Mondays and Tuesdays.

Mon	Tue	Wed
<b>Mar 28</b> <b>4</b> <input type="checkbox"/> 8:00 a - 11:30 a <input type="checkbox"/> 8:00 a - 11:30 a <input checked="" type="checkbox"/> 8:00 a - 11:30 a <span style="font-size: small;">Bobbie Fryer</span> <input type="checkbox"/> 12:00 p - 3:30 p <input checked="" type="checkbox"/> 12:00 p - 3:30 p <span style="font-size: small;">Deidre Griffin</span>	<b>Mar 29</b> <b>5</b> <input type="checkbox"/> 8:00 a - 11:30 a <input type="checkbox"/> 8:00 a - 11:30 a <input type="checkbox"/> 8:00 a - 11:30 a <input type="checkbox"/> 12:00 p - 3:30 p <input type="checkbox"/> 12:00 p - 3:30 p	<b>Mar 30</b> <b>6</b> <input type="checkbox"/> 8:00 a - 11:30 a <input type="checkbox"/> 8:00 a - 11:30 a <input checked="" type="checkbox"/> 8:00 a - 11:30 a <span style="font-size: small;">Bobbie Fryer</span>
<b>11</b> <input type="checkbox"/> 8:00 a - 11:30 a <input type="checkbox"/> 8:00 a - 11:30 a <input checked="" type="checkbox"/> 8:00 a - 11:30 a <span style="font-size: small;">Bobbie Fryer</span> <input type="checkbox"/> 12:00 p - 3:30 p <input type="checkbox"/> 12:00 p - 3:30 p	<b>12</b> <input type="checkbox"/> 8:00 a - 11:30 a <input type="checkbox"/> 8:00 a - 11:30 a <input type="checkbox"/> 8:00 a - 11:30 a <input type="checkbox"/> 12:00 p - 3:30 p <input type="checkbox"/> 12:00 p - 3:30 p	<b>13</b> <input type="checkbox"/> 8:00 a - 11:30 a <input type="checkbox"/> 8:00 a - 11:30 a <input checked="" type="checkbox"/> 8:00 a - 11:30 a <span style="font-size: small;">Bobbie Fryer</span>
<b>18</b>	<b>19</b>	<b>20</b>

When you're working with openings, keep in mind that making a change to an opening (such as editing the opening's times) will make the same change on every day of the week the opening occurs (both past and future).

3. Openings are not the same as schedule entries. You can think of an opening slot as a container that can hold a schedule entry, but the opening and the schedule entry are still independent of each other. Volunteers can be placed on the schedule without filling an opening slot, they can be placed on the schedule as filling an opening but with different start and/or stop times than the opening, or they can be placed on the schedule as filling the opening with the same start and stop times as the opening.



In the example shown below, Victoria Perry has been placed on the schedule without filling an opening. This creates a schedule entry for Victoria that is not associated with an opening. It's easy to tell she's not filling an opening because the **schedule icon** [pg:0756] shows a figure *without* a box around it.

Deidre Griffin has been placed on the schedule as filling an opening. By default, her schedule entry had the same start and stop times as the opening. However, either her schedule entry was edited to have different start and stop times, or the opening's times were edited to be different than the volunteer's scheduled times. The schedule entry is still associated with the opening though. It's easy to tell because the **schedule icon** [pg:0756] shows a figure with a box around it.

	8:00 a	11:30 a	<input type="checkbox"/>	Fryer, Bobbie	✓					Edit	Remove	Edit	Delete
	12:00 p	3:30 p	<input type="checkbox"/>	Perry, Victoria						Edit	Remove		
	12:00 p	3:30 p	<input type="checkbox"/>							Fill	Close	Edit	Delete
	12:00 p	3:30 p	<input type="checkbox"/>	Griffin, Deidre (12:30 p to 4:00 p)						Edit	Remove	Edit	Delete
3 volunteers scheduled, 3 unfilled openings											Remove all		

*When you're working with openings, keep in mind that schedule entries are independent of openings. A volunteer can be filling an opening, but not be scheduled for the same start and stop times as the opening.*

4. Volunteers can be scheduled to fill an opening for one day only, or on a repeating basis such as every Monday and Wednesday. If a volunteer is scheduled on an ongoing (repeating) basis, the daily schedule will indicate this with a checkmark in the *Reg* column. In the example pictured below, Bobbie Fryer is scheduled on a repeating basis, and Deidre Griffin is only scheduled for one day.

From	To	Tag	Volunteer	Reg	Sub	Note	Opening						
<input type="checkbox"/>	8:00 a	11:30 a					Fill	Close	Edit	Delete			
<input type="checkbox"/>	8:00 a	11:30 a					Fill	Close	Edit	Delete			
	8:00 a	11:30 a	<input type="checkbox"/>	Fryer, Bobbie	✓		Edit	Remove	Edit	Delete			
<input type="checkbox"/>	12:00 p	3:30 p					Fill	Close	Edit	Delete			
	12:00 p	3:30 p	<input type="checkbox"/>	Griffin, Deidre			Edit	Remove	Edit	Delete			
2 volunteers scheduled, 3 unfilled openings											Remove all		

*When you're working with openings, keep in mind that changing the days of the week openings occur on can leave the volunteers on the schedule as not filling an opening slot. For example, if a volunteer is scheduled as filling an opening that repeats on Mondays, Wednesdays, and Fridays, and the opening is edited to only take place on Mondays and Wednesdays, the volunteer will still be on Friday's schedule but not as filling an opening unless you also edit the volunteer's Schedule Entry to only take place on Mondays and Wednesdays.*

### Get Started with Editing an Opening

No matter what changes you'd like to make to an opening, the steps to get started are always the same. Here is how to get started:

1. Select *Assignments* from the **menu** [pg:0215].

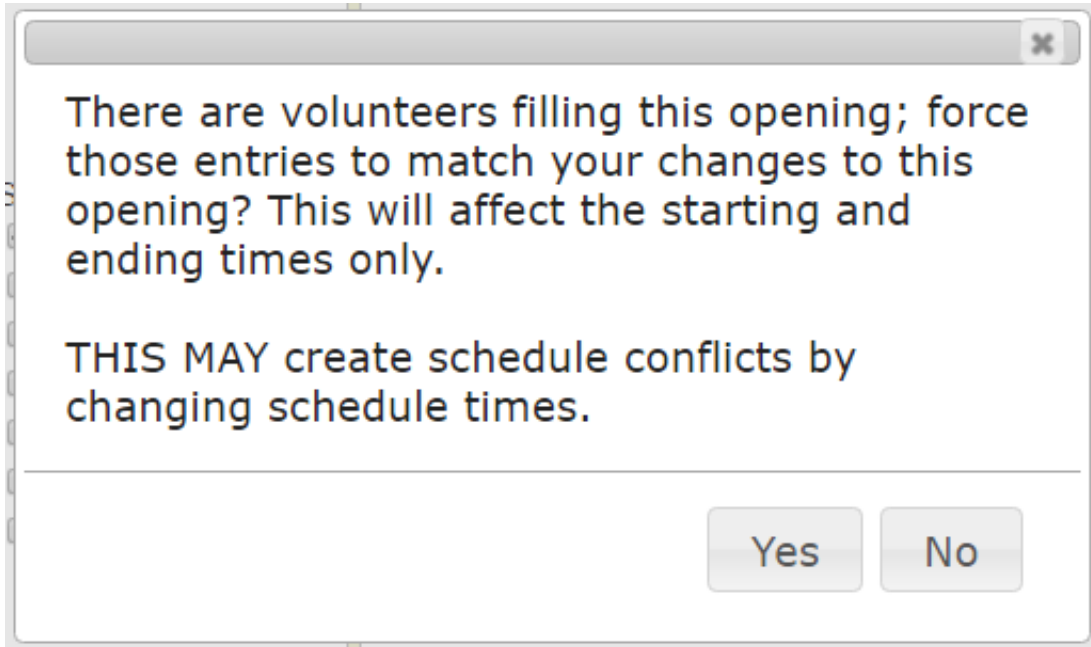
2. Select the Assignment you need to make changes to.
3. Select the *Schedule* tab.
4. Go to the daily view of the schedule for the date the opening is on. If the opening is an ongoing opening that repeats, any of the dates where the opening occurs will work.
5. Click the *Edit* link in the Opening column. If a volunteer is scheduled to fill the opening, this is the link on the right side. If there are multiple shifts on the day, make sure you select the *Edit* link by the shift times for the opening you want to change. In the example below, the links in the red box are for the 2:30 pm to 4:30 pm opening:

	From	To	Tag	Volunteer	Reg	Sub	Note	Opening			
	9:30 a	11:30 a	<input type="checkbox"/>	Boston, Jennifer	✓			Edit	Remove	Edit	Delete
<input type="checkbox"/>	2:30 p	4:30 p						Fill	Close	<b>Edit</b>	Delete
	2:30 p	4:30 p	<input type="checkbox"/>	Geer, Catherine	✓			Edit	Remove	Edit	Delete
	7:00 p	9:00 p	<input type="checkbox"/>	Heng, Delois	✓			Edit	Remove	Edit	Delete
3 volunteers scheduled, 1 unfilled openings										Remove all	

### Change the Times When an Opening Occurs

This section explains how to change the times when an opening is setup to occur. Please keep in mind that making these changes will make the same change for every slot associated with the opening on every day of the week that the opening occurs. Changing the times can also cause volunteers scheduled to fill the opening to be scheduled at different times than the opening. The [Tips for Working with Openings](#) section explains more.

1. Follow the steps in the [Get Started with Editing an Opening](#) section to open the *Edit an opening* box for the opening.
2. Adjust the start and/or end times. The earliest and latest times that appear in the dropdown lists, and the intervals (such as hourly, half hourly, or quarterly), are controlled by your settings on the [Scheduling Ground Rules \[pg:1392\]](#) page.
3. Click the **Save** button.
4. If there are volunteers scheduled to fill the opening, a pop-up will appear asking if you'd like to change the volunteers' scheduled times also:



If you click the **Yes** button, this will make the times the volunteers are scheduled match the new opening times. *This can create schedule conflicts.* For example, if a volunteer is scheduled to fill the opening from 9:30 am to 11:30 am, and is scheduled to work in a different assignment from 12:00 pm to 1:30 pm, editing the opening's ending time to be 12:30 pm instead of 11:30 am and clicking the **Yes** button will cause the volunteer to be double booked. This is because the end time of 12:30 pm will overlap the start time of 12:00 pm in the other assignment.

If you click the **No** button, this will change the opening times without affecting the times the volunteer is scheduled. You can see an example of this in item 3 in the Tips for Working with Openings section.

### Change the Frequency When an Opening Occurs

This section explains how to change the pattern or frequency when an opening is setup to occur. Please keep in mind that making these changes will make the same change for every slot associated with the opening, on every day of the week the opening occurs, and can cause volunteers to be left on the schedule without filling an opening slot any longer. The Tips for Working with Openings section explains more.

1. Follow the steps in the Get Started with Editing an Opening section to open the *Edit an opening* box for the opening.
2. Change the settings in the *This opening is* section to change when the opening takes place.

times: [2:00 p.m.] to [4:00 p.m.]

This opening is:  For one day only [October] [30] [2016]

Ongoing

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Every	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
1st	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2nd	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3rd	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4th	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5th	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Alternate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Starting [January] [1] [2012]

Keep in mind that if volunteers are filling the opening, making these changes may leave them on the schedule but not as filling an opening. For example, if an opening is a one day only opening on October 28, 2016 and volunteers are filling the opening's slots on the 28th, changing the opening to a one day only opening on October 29, 2016 will leave the volunteers on the schedule on the 28th but not as filling opening slots.

3. Click the **Save** button.

4. If there are volunteers scheduled to fill the opening, a pop-up will appear asking if you'd like to change the volunteers' scheduled times also. If you did not make a change to the times, click the "X" in the upper right corner to close the pop-up. If you did make a change to the times, see the Change the Times When an Opening Occurs section for information on which button to click.

### Change the Opening's Starting or Ending Dates

This section explains how to change the starting or ending dates when an opening is setup to occur. Please keep in mind that making these changes will make the same change for every slot associated with the opening, on every day of the week the opening occurs, and can cause volunteers to be left on the schedule without filling an opening slot any longer. The Tips for Working with Openings section explains more.

1. Follow the steps in the Get Started with Editing an Opening section to open the *Edit an opening* box for the opening.

2. Change the settings in the Starting and Ending section to change the date range the opening takes place.



The screenshot shows a form titled "Alternate" with several tabs. The "Starting" section is active, showing a dropdown menu for "January", a dropdown for "1", and a dropdown for "2012". Below this, there are two radio button options: "Ongoing" (unselected) and "Ending:" (selected). The "Ending:" option has a dropdown for "December", a dropdown for "31", and a dropdown for "2016". At the bottom, there is a "Note:" field with a text input area.

Keep in mind if volunteers are filling the opening, making these changes may leave them on the schedule but not as filling an opening. For example, if an opening is setup as *Ongoing* (its ending date stretches on perpetually), setting an ending date such as December 31, 2016 will leave volunteers scheduled in 2017 and after on the schedule but not as filling an opening.

3. Click the **Save** button.

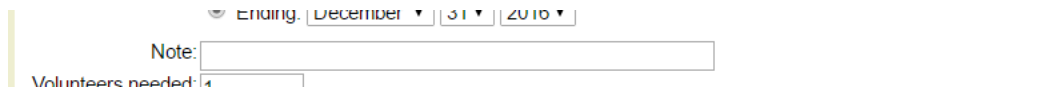
4. If there are volunteers scheduled to fill the opening, a pop-up will appear asking if you'd like to change the volunteers' scheduled times also. If you did not make a change to the times, click the "X" in the upper right corner to close the pop-up. If you did make a change to the times, see the Change the Times When an Opening Occurs section for information on which button to click.

### Add, Edit, or Delete an Opening Note

This section explains how to add, edit, or delete a note for the opening. Please keep in mind that making these changes will make the same change for every slot associated with the opening on every day of the week the opening occurs. The Tips for Working with Openings section explains more.

Please keep in mind that schedule entries and schedule openings are separate items so they can have separate notes. To learn more about the differences in these notes, and where they will appear, see [help topic 1182 \[pg:0750\]](#).

1. Follow the steps in the Get Started with Editing an Opening section to open the *Edit an opening* box for the opening.
2. Make your changes in the Note field for the opening.



The screenshot shows a portion of a web interface. At the top, there are three dropdown menus: 'Ending', 'December', and '31', followed by '2016'. Below these is a text input field labeled 'Note:'. Underneath the 'Note' field is another input field labeled 'Volunteers needed: 4'. The interface is framed by vertical lines on the left and right sides.

3. Click the **Save** button.
4. If there are volunteers scheduled to fill the opening, a pop-up will appear asking if you'd like to change the volunteers' scheduled times also. If you did not make a change to the times, click the "X" in the upper right corner to close the pop-up. If you did make a change to the times, see the Change the Times When an Opening Occurs section for information on which button to click.

### Change the Number of Volunteers Needed

This section explains how to change the number of volunteers needed for the opening. Please keep in mind that making these changes will make the same change on every day of the week the opening occurs, and can cause volunteers to be left on the schedule without filling an opening slot. The Tips for Working with Openings section explains more.

#### Please note!

##### 1.

If the opening is an ongoing opening, and you just want to reduce the number of volunteers needed on certain days without impacting other days that the opening occurs, we recommend closing the un-needed opening slots instead of editing the opening to reduce the number of volunteers needed. You can find information on how to do this in the *Reduce the Number of Volunteers Needed on Just One Day* section of [help topic 2030 \[\\_\\_\\_\\_\\_\]](#).


##### 2.

There is not a way to reduce the number of opening slots for just one day of the week. For example, if the opening repeats every Monday, Tuesday, and Wednesday with four slots on each day, there is not a way to change just Tuesdays to have two slots but leave four slots on Mondays and Wednesdays.

If you only need to make this change for a few Tuesdays, just follow the steps in the *Reduce the Number of Volunteers Needed on Just One Day* section of [help topic 2030 \[\\_\\_\\_\\_\\_\]](#). If you need to make a permanent change for all Tuesdays, you will need to edit the original opening to take place on just Mondays and Wednesdays. Then, [make a new opening \[pg:0776\]](#) that repeats every Tuesday with just two slots. If you do this, any volunteers scheduled on Tuesdays will be left on the schedule, but not as filling an opening slot. You will need to go back and remove them from the schedule, and then place them back on as filling an opening slot.

To make a change for the number of volunteers needed:

1. Follow the steps in the Get Started with Editing an Opening section to open the *Edit an opening* box for the opening.
2. Change the number in the *Volunteers needed* field to control how many slots the openings will have.



The screenshot shows a form with two input fields. The first field is labeled 'Volunteers needed:' and contains the number '3'. The second field is labeled 'Opening number' and contains the number '50'. There is a 'NOTE:' label above the first field.

Keep in mind that if volunteers are filling the opening, making this change may leave them on the schedule but not as filling an opening. For example, if the opening originally had 4 volunteers needed and there is a date where 3 volunteers are scheduled to fill the opening. In this case, changing the *Volunteers needed* field to 2 would leave one volunteer on the schedule as not filling an opening.

3. Click the **Save** button.
4. If there are volunteers scheduled to fill the opening, a pop-up will appear asking if you'd like to change the volunteers' scheduled times also. If you did not make a change to the times, click the "X" in the upper right corner to close the pop-up. If you did make a change to the times, see the Change the Times When an Opening Occurs section for information on which button to click.

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## Working with Schedule Preferences

Help topic 2134

Added or revised 04-25-2008

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If your [online volunteer application forms \[pg:0413\]](#) ask applicants to indicate which schedule openings they want to serve in, you can view their schedule preferences on any of the Schedule tabs, and easily schedule volunteers according to their choice of schedule openings.

### Working with schedule preferences for individual volunteers

To view an individual volunteer's schedule preferences:

1. Choose Volunteers from the [menu \[pg:0215\]](#).
2. Select the volunteer's record.
3. Select the Schedule tab.
4. If necessary, use the **Next month** button to move to the month of the volunteer's schedule preference.

The volunteer's schedule preferences (as indicated on their volunteer application form) appear with the *raised hand* icon, as shown here:

# Dakin, Ruth

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

Tagged New Previous Next

July 2006 Jul 2006 Go Prev month Next month

[Printable View](#)

Assignment	From	To	Rank	Reg	Note
Tuesday, July 4, 2006					
 Ticket booth [Monroe County\Volunteer Services]	9:45 a	12:45 p		<input checked="" type="checkbox"/>	<a href="#">Add to schedule</a>

 = Schedule preference

When a schedule entry appears with this *raised hand* icon, it shows you that this is an opening the volunteer has selected as a schedule preference on their application form. The volunteer is not yet scheduled for the opening when the schedule entry includes the *raised hand* icon.

In the example pictured above, volunteer 'Ruth Dakin' indicated that she was interested in serving in the 'Ticket booth' assignment for the 9:45 a.m. to 12:45 p.m. opening on July 4, 2006.

If you want to add a volunteer to a schedule opening based on one of their schedule preferences, simply click the 'Add to schedule' link. Once you click the 'Add to schedule' link the volunteer is added to schedule for the opening shown on the schedule preference.

July 2006 Jul 2006 Go Prev month Next month

[Printable View](#)

Assignment	From	To	Rank	Reg	Note
Tuesday, July 4, 2006					
 Ticket booth [Monroe County\Volunteer Services]	9:45 a	12:45 p		<input checked="" type="checkbox"/>	<a href="#">Add to schedule</a>

 = Schedule preference

## Working with schedule preferences for Assignments

To see which volunteers have schedule preferences in an individual assignment:

1. Choose Assignments from the [menu \[pg:0215\]](#).
2. Click on the Assignment name.
3. Select the Schedule tab.
4. Select the daily view for the date you want to view volunteer schedule preferences.

Volunteers schedule preferences (as indicated on their volunteer application forms) also appear on the assignment's Schedule tab with the *raised hand* icon, as shown here:

## Ticket booth

Assignment | Coordinators | Profile | Description | Volunteers | **Schedule**

Show setup | Calendar

**Tuesday, July 4, 2006** Jul 4 2006 Go Prev day Next day

Printable View | Email

From	To	Tag	Volunteer	Opening	Reg	Note
				9:45 a - 12:45 p		Fill Close
				9:45 a - 12:45 p		Fill Close
				9:45 a - 12:45 p		Fill Close
9:45 a	12:45 p	<input checked="" type="checkbox"/>	 Dakin, Ruth			Add to schedule

0 volunteers scheduled, 3 unfilled openings, 1 preferences

[Schedule a volunteer](#)

When a schedule entry appears with this *raised hand* icon, it shows you that this is an opening the volunteer has selected as a schedule preference on their application form. The volunteer is not yet scheduled for the opening when the schedule entry includes the *raised hand* icon.

In the example pictured above, volunteer 'Ruth Dakin' indicated that she was interested in serving in the 'Ticket booth' assignment for the 9:45 a.m. to 12:45 p.m. opening on July 4, 2006.

It is possible to hide volunteer schedule preference selections on an assignment-by-assignment basis. If you do not see volunteer schedule preference, they may be hidden for this assignment. In this case you can display them like this:

1. Choose Assignments from the menu.
2. Click on the name of the Assignment for which you would like to change this setting.
3. Click on the Assignment's Openings tab.

(If you do not see the setup options on the Openings tab, your Volgistics operator rights do not provide access to this area. If you have questions about your Volgistics operator rights, contact your organization's Volgistics administrator.)

4. Under "Other options," check "Display volunteer schedule preferences for this assignment."
5. Click the Save button.

If you want to add a volunteer to a schedule opening based on one of their schedule preferences, simply click the 'Add to schedule' link. Once you click the 'Add to schedule' link the volunteer is added to schedule for the opening shown on the schedule preference.



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## How do I add schedule openings?

Help topic 2158

Added or revised 10-18-2016

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Some volunteer assignments lend themselves to structured scheduling. These include assignments where there are specific dates and times when a certain number of volunteers will be needed. For example, an organization might always need two volunteers for an *Information Desk* assignment from 10:00 a.m. to 2:00 p.m., and 2:00 p.m. to 6:00 p.m., every weekday.

Volgistics provides a way for you to define schedule *openings* that show the dates and times volunteers are needed for assignments that have structured volunteer schedules. *Openings* create a framework for each schedule. Once you have schedule openings in place, you can begin scheduling specific volunteers for each opening.

Not all – or perhaps none – of your assignments might lend themselves to structured scheduling, and that's okay too. You can still track volunteer schedules for each of your assignments even if you don't define schedule openings in advance.

This help topic explains how to add schedule openings, and how to schedule volunteers to fill an opening. You can go directly to a section of the help topic by clicking the link in the Content box below.

### Contents

To Add an Opening to a Schedule

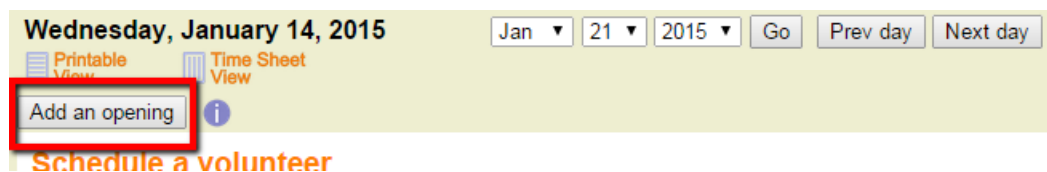
Schedule Opening Example

View Your New Openings

Filling an Opening

### To Add an Opening to a Schedule

1. Select *Assignments* from the [menu \[pg:0215\]](#).
2. Locate the Assignment you want to add schedule openings to (if you have not yet created an Assignment record for the assignment you want to build a schedule for, [add the assignment first \[pg:0106\]](#)).
3. Click on the Assignment name, and then choose the Schedule tab.
4. If you initially see the schedule in *calendar view*, click the **Daily Schedule** button.
5. Click the **Add an opening** button.



If you do not see an **Add an opening** button, your Volgistics [System Operator \[pg:0065\]](#) rights do not include the ability to add schedule openings. Your operator rights are controlled by your organization's [Volgistics Administrator\(s\) \[pg:0052\]](#). Another reason you may not see the **Add an opening** button is if you are on a Place or Site record instead of an Assignment record. You can learn more about the Site, Place and Assignment hierarchy in [help topic 2099 \[pg:0096\]](#).

6. Enter the information for the opening(s) you want to add to this schedule.

### Times

Select the starting and ending times for this opening from the dropdown lists. This is the time volunteers will be scheduled to serve for their shift.

### This opening is

Choose *For one day only* or *Ongoing*, depending on your needs.

#### *For one day only*

Choose *For one day only* if the opening you're adding will only take place on one calendar date. If you choose this option, also select the date the opening is for from the date dropdown list.

#### *Ongoing*

Choose *Ongoing* if the opening you're adding will repeat regularly (such as every Monday, every weekday, or the first Saturday of each month). If you choose *Ongoing*, also check the boxes for the weekdays and cycle for when the opening will repeat.

#### *Starting, Ongoing or Ending*

Use the *Starting* and *Ending* date dropdown lists to select when the opening will begin and end. If the opening will repeat indefinitely into the future without a foreseeable ending date, select *Ongoing*.

### Note

If there is some specific information that you want to appear as part of this opening, enter it in the *Note* field. The information will appear on each instance (or slot) for the opening.

Notes can be used to differentiate individual schedule openings. For example, if volunteers will serve in a team of four with one of the four functioning as the team leader, make one opening with 3 in the *Volunteers needed* field. Make a second opening for the same times and dates, but enter 1 in the *Volunteers needed* field and "Team Leader" in the *Note* field. The schedule will show with 3 regular slots and 1 spot for the team leader.

### Volunteers needed

Enter the number of volunteers needed for this opening. This will control how many slots, or instances of the opening, appear on the schedule for the opening. For example, if you enter 8 here the calendar will have 8 instances of the opening for the dates and times you selected.

7. Click the **Save** button to save the opening.

### **Schedule Opening Example**

Here's an example of how you would add four slots, or instances, of an opening for a shift from 8:00 a.m. to 10:30 a.m. every Monday, Wednesday and Friday. The opening will start on January 21, 2015 and continue indefinitely into the future.

### Add an opening Hide

Times:  to

This opening is:  For one day only

Ongoing

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Every	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
1st	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2nd	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3rd	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4th	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5th	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Alternate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Starting

Ongoing

Ending:

Note:

Volunteers needed:

Opening number 0

### View Your New Openings

Once you add one or more openings to a schedule, you'll see the schedule openings when you view the schedule for the date(s) you specified for the opening. You may need to move the daily schedule view to a date that has your opening using the date selector as shown below:

**Wednesday, January 14, 2015** Jan ▾ 21 ▾ 2015 ▾

Here's how the four openings added in the example shown above would appear on the schedule:

**Wednesday, January 21, 2015** Jan ▾ 21 ▾ 2015 ▾

From	To	Tag	Volunteer	Reg	Sub	Note	Opening			
<input type="checkbox"/>	8:00 a	10:30 a					Fill	Close	Edit	Delete
<input type="checkbox"/>	8:00 a	10:30 a					Fill	Close	Edit	Delete
<input type="checkbox"/>	8:00 a	10:30 a					Fill	Close	Edit	Delete
<input type="checkbox"/>	8:00 a	10:30 a					Fill	Close	Edit	Delete

0 volunteers scheduled, 4 unfilled openings

## Filling an opening

There are a couple of different ways to place a volunteer on the schedule as filling an opening slot. One way is to click the *Fill* link beside the unfilled spot on the daily view of the schedule.

	From	To	Tag	Volunteer	Reg	Sub	Note	Opening			
<input type="checkbox"/>	8:00 a	10:30 a						<b>Fill</b>	Close	Edit	Delete
<input type="checkbox"/>	8:00 a	10:30 a						Fill	Close	Edit	Delete

This will open a *Fill an opening* box at the bottom of the page. You can then select the name of the volunteer who will serve from the *Volunteer* dropdown list and select if the volunteer will only serve on one date or regularly. Please note that the volunteer does not need to serve on the exact same cycle as the opening. For the opening in the example above, here is how a volunteer who can only serve every other Wednesday would be placed in the opening. Notice that to do this you check the box where the *Alternate* row and the *Wednesday* column meet:

### Fill an opening

Volunteer: Becker, Anna

From: 8:00 a to 10:30 a

Frequency:  One time: January 21 2015

Regular:

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Every	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1st	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2nd	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3rd	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4th	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5th	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Alternate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Time period: Starting: January 21 2015

Ongoing

Ending: January 21 2015

This volunteer will be linked to opening number 146

Save Cancel

You can also schedule volunteers as filling an opening slot from the Schedule tab of their volunteer record. To do this, select *Volunteers* from the menu [pg:0215], go to the record for the volunteer you'd like to schedule, and click the Schedule tab. Select the name of the assignment you're scheduling the volunteer for from the *Add to schedule* dropdown and then click the **Go** button. A calendar will appear showing the dates with un-filled openings.

**Add**

Openings for "Department Assistant [Main Hospital\Administration]"  
January 2015

Jan ▼ 2015 ▼ Go Prev month Next month

Sun	Mon	Tue	Wed	Thu	Fri	Sat
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

Click any highlighted date to select an opening that day.

Click the highlighted date for the date you'd like the volunteer to begin to be scheduled. This will open a box where you can schedule the volunteer to serve for just one date or on a repeating basis. *This method of scheduling is especially handy when you are scheduling groups [pg:1909]* because you can fill multiple opening slots at once as shown in [help topic 1197 \[pg:0753\]](#).

**Please Note:**

You should not use the

*Schedule a volunteer*

box to place volunteers on the schedule if you want them to be scheduled as filling an opening. This method of scheduling will place volunteers on the schedule without filling an opening slot. An easy way to tell if a volunteer has been placed on the schedule as filling an opening slot, or without filling an opening slot, is to look at the schedule icons. You can learn more about this in [help topic 1205 \[pg:0756\]](#).

## Optimizing Volunteer Participation Using Self Scheduling

Help topic 2171

Added or revised 04-25-2014

[Self scheduling \[pg:1494\]](#) is a powerful Volgistics tool that can help streamline a volunteer leader's scheduling duties. If you're using these features, you should give some consideration to how often volunteers should be able to schedule themselves, and for [which assignments \[pg:2006\]](#).

**A special event example**

An organization coordinates volunteers who assist with a major sporting event over a seven day period. Some of their volunteers are super enthusiastic about participating, and - given the opportunity - they would schedule themselves for many different shifts every day of the event. The volunteer leader recognizes that this sort of commitment, while appreciated, might lead to burnout among these volunteers and also limit the number of opportunities available for other volunteers to get involved.

Therefore, the volunteer leader configures self scheduling to limit the number of different shifts a volunteer can schedule themselves to serve on any single day to one, and the overall shifts a volunteer can schedule themselves for to three. They set the overall limit so it is never resets automatically. Here is what their selections on the VIC Self Scheduling page will look like:

Offer schedules using a calendar format

Limit volunteers to scheduling themselves for no more than  shift(s) per day

Limit the number of shifts a volunteer may schedule themselves for through self-scheduling to a total of  shift(s)

Reset this limit...

Daily

Monthly

Never

---

## Schedule Rules

Help topic 2172

Added or revised 09-19-2016

---

Every Assignment you track in Volgistics may optionally include a volunteer schedule.

You can tailor the way each Assignment's schedule works, depending on the needs of the Assignment. For example, you can have some Assignments for which volunteers must serve only on specific dates at specific times (these are called [openings \[pg:0776\]](#)), while other Assignments may permit scheduling on any dates or times.

The Rules tab in the Assignment record is where you specify how you want the schedule to work for a specific Assignment. If you're not already on the Rules tab you can get there like this:

1. Choose Assignments from the [menu \[pg:0215\]](#).
2. Select the Assignment for which you want to set up a schedule.
3. Click on the Rules tab.

(If you do not see the Rules tab, your Volgistics [System Operator \[pg:0065\]](#) rights do not provide access to this area. If you have questions about your operator rights, contact your organization's [Volgistics Administrator \[pg:0052\]](#).)

You can click on a section of the help topic in the *Content* box below to go directly to that section.

### Contents

[Who can sign-up for this schedule?](#)

[Allow scheduling for](#)

[The \*Help Wanted\* Icons Do Not Appear on the Calendar](#)

[Self-scheduling alerts](#)

[Other options](#)

[Make this the default setup.](#)  
**[Who can sign-up for this schedule?](#)**

If you use the [self-scheduling \[pg:1494\]](#) features, you can use the controls in this section to specify which volunteers are allowed to schedule themselves or be scheduled by a [Coordinator \[pg:0163\]](#) for this Assignment. For example, you may have some Assignments that only 'Adult' volunteers may perform; or you may want volunteers to schedule themselves or be scheduled by coordinators only for the Assignments to which they are

specifically assigned (on their Service tab).

#### Volunteers cannot schedule themselves or be scheduled by coordinators

If you choose this option, no volunteers can be scheduled for this Assignment with the volunteer information center self-scheduling features. That is, volunteers are unable to schedule themselves for this Assignment, and Coordinators are also unable to schedule any volunteers in this Assignment. With this option selected, the only way volunteers will be scheduled in this Assignment is if you, or another Volgistics System Operator, specifically schedules them from within Volgistics.

#### Volunteers can schedule themselves or be scheduled by a coordinator if their record has...

Choose this option if you want certain (but not all) volunteers to be able to schedule themselves for this Assignment and you want Coordinators to be able to schedule some (but not all) of their volunteers for this Assignment. When you choose this option, you must use the following controls to specify which volunteers can be scheduled with the volunteer information center self-scheduling features:

- One of these volunteer Statuses:

Select the volunteer **Status(es)** [pg:1832] that volunteers must have in order to be able to schedule themselves or be scheduled by Coordinators for this Assignment. For instance, check only 'Active' if you only want volunteers whose status is 'Active' to be able to schedule themselves. Each volunteer's Status is shown on their **Core tab** [pg:1868].

You may check any combination of Statuses.

If you want volunteers to be able to schedule themselves for this Assignment and Coordinators to be able to schedule their volunteers for this Assignment no matter what their Status is, check all of the Statuses. **You must select at least one Status in order for self scheduling to work.**

- One of these Roles in this assignment:

Use the checkboxes in this section if you only want volunteers to be able to schedule themselves or be scheduled by Coordinators if they have this Assignment (if this Assignment appears on the **Service tab** [pg:0138] in their record). In this case, check the **Role(s)** [pg:0103] that the volunteers must have in this Assignment in order for them to be able to schedule themselves or be scheduled by a Coordinator.

For example, if you only want to allow volunteers to schedule themselves or be scheduled by a Coordinator for this Assignment if their Role in the Assignment is 'Assigned,' then check the *Assigned* checkbox.

You may check any combination of Roles.

If you want volunteers to be able to schedule themselves or be scheduled by Coordinators for this Assignment even if they do not have this Assignment on their Assignment tab, do not check any of the Roles in this section.

- Include matched volunteers

If you use **volunteer and Assignment matching** [pg:0899], you can allow volunteers to schedule themselves or be scheduled by Coordinators for this Assignment if they are matched to the Assignment, regardless of their Role(s). If you have disabled the matching features, this checkbox will not appear.

- This Flag:

If you want volunteers to be able to schedule themselves or be scheduled by a Coordinator for this Assignment only if they have a particular [Flag \[pg:0212\]](#) on their [Core tab \[pg:1868\]](#), select that Flag here.

For example, if you have a Flag for 'Red Team,' and only Red Team volunteers should be allowed to schedule themselves or be scheduled by a Coordinator for this Assignment, select the 'Red Team' Flag here.

- This Type:

If you want volunteers to be able to schedule themselves or be scheduled by Coordinators for this Assignment only if they have a particular [Type \[pg:0212\]](#) on their [Core tab \[pg:1868\]](#), select that Type here.

For example, if you have a Type called 'Adult' and only Adult volunteers should be allowed to schedule themselves or be scheduled by Coordinators for this Assignment, select the 'Adult' Type here.

### Example

In the example configuration shown below for an Assignment called 'Tutor', volunteers can schedule themselves or be scheduled by a coordinator if they are 'Active' volunteers, and they are assigned to the Tutor Assignment with the Role of either 'Assigned,' 'Trainee,' or 'Substitute.'

#### Schedule openings & setup

**Who can sign-up for this schedule?**

Volunteers cannot schedule themselves or be scheduled by coordinators

Volunteers can schedule themselves or be scheduled by a coordinator if their record has...

One of these volunteer Statuses:

<input checked="" type="checkbox"/> Active	<input type="checkbox"/> Applicant	<input type="checkbox"/> Inactive
<input type="checkbox"/> LOA	<input type="checkbox"/> Prospect	<input type="checkbox"/> Sick
<input type="checkbox"/> Vacation		

One of these Roles in this assignment:

<input checked="" type="checkbox"/> Assigned	<input type="checkbox"/> Former	<input type="checkbox"/> Inactive
<input type="checkbox"/> Preference	<input type="checkbox"/> Referral	<input checked="" type="checkbox"/> Substitute
<input checked="" type="checkbox"/> Trainee		

Their Match is:

<input type="checkbox"/> Good	<input type="checkbox"/> Fair	<input type="checkbox"/> Marginal
-------------------------------	-------------------------------	-----------------------------------

This Flag:

This Type:

Any volunteer can schedule themselves or be scheduled by a coordinator

A volunteer with the Status and Assignment entries shown below would be able to schedule themselves or be scheduled by a Coordinator for the Tutor Assignment because their Status is 'Active' and they are assigned to the Tutor Assignment with one of the three required Roles (Substitute). If they did not have the Status 'Active,' or if they were not assigned to the Tutor Assignment with the role of 'Assigned,' 'Trainee,' or 'Substitute,' they would not be able to schedule themselves or be scheduled by a Coordinator for the Tutor Assignment in this example.



Core Profile Service Schedule History Contacts Notes Vic

Save Cancel Archive Delete Combine  Tagged New Previous Next

**Name**

Last name: Bailey Number: 3959100

First name: George Status: Active

Middle name: M Title: Mr Time: Adult

Core Profile Service Schedule History Contacts Notes Vic

Tagged New Previous Next

**Assignments**

Assignment	Role	From	To	
Tutor [Client Services]	Substitute			Edit Delete

Any volunteer can schedule themselves or be scheduled by a coordinator

Choose this option if you want *any* volunteers to be able to schedule themselves or be scheduled by a Coordinator for this Assignment.

**Allow scheduling for...**

Use this option to control the way volunteers may be scheduled for this assignment.

This option affects the way Volgistics **System Operators** [pg:0065] may schedule volunteers for this Assignment on the Schedule tab of the volunteer record. If you use **self-scheduling** [pg:1494], this option also affects the way volunteers may schedule themselves as well as how Coordinators may schedule their volunteers for this Assignment.

Openings only

Select this option if you want to schedule volunteers in this Assignment only for specific days and times. This is the best option for Assignments where structured schedules are important; and when you need to have a specific number of volunteers scheduled.

When you select this option you must **add one or more openings** [pg:0776] to the schedule.

When you select this option, and scheduling is done from the Schedule tab of the volunteer's record, **System Operators** [pg:0065] can only add volunteers to this Assignment's schedule for the days and times for which there are openings. Once all of the openings are filled on a given date, no additional volunteers may be scheduled (unless you add more openings).

If you select this option and you use [self scheduling \[pg:1494\]](#), volunteers will only be able to schedule themselves in this Assignment for the days and times of your openings. Once all of the openings on a given date are filled, volunteers can no longer schedule themselves for that date (unless you add more openings).

#### Any times on these days

Select this option if it is OK to schedule volunteers in this Assignment with any start and stop time, on any day or on specific days of the week. This is the best option for Assignments where structured schedules are not needed, such as self-paced or self-directed service; and when the number of volunteers scheduled for any day or time is not important.

When you select this option volunteers can be added to this schedule for any times on any of the days you mark here.

If you select this option and you use self-scheduling, volunteers will be able to sign themselves up for this Assignment on any day(s) you have indicated here, for any times they choose. Note that Coordinators are not able to schedule volunteers for 'any times,' so even when this option is selected Coordinators are only able to schedule their volunteers in existing schedule openings.

When you choose 'Any times,' the times volunteers may be scheduled are bound by the [Hours of operation \[pg:1395\]](#) you set on the Scheduling Ground Rules page in Setup. For example, if you set your hours of operation to 7:00 a.m. through 10:00 p.m., volunteers may be scheduled for any times, but only between 7:00 a.m. and 10:00 p.m.

## The

### ***Help Wanted***

#### **Icons Do Not Appear on the Calendar**

The Volgistics Support Team often answers [help inquires \[pg:0184\]](#) about why volunteers are not seeing the Help Wanted icons on the calendar. Here are four common reasons a volunteer will not see the icons:

1. There are not any opportunities to serve created in your account. If the Rules tab of the Assignment is configured for *Openings only*, there must be unfilled [openings \[pg:0776\]](#) on the Assignment's schedule. If the Rules tab is configured for

*Any times on these days*

, there must be days of the week checked.

2. The volunteer must meet

*all*

of the requirements set on the Rules tab of the Assignment. For example, if the Rules tab is set to require the volunteer to have an Active [Status \[pg:1832\]](#), a [Role \[pg:0103\]](#) of Assigned or Substitute, and a [CPR Certified Flag \[pg:0212\]](#), only volunteers who meet *all three* requirements will see the Help Wanted icons.

3. The opportunities to serve are outside of the date range settings on the [VIC Self Scheduling setup \[pg:1494\]](#)

page. For example, let's say you allow volunteers to schedule themselves one month in advance. If a volunteer views the schedule on September 3rd, openings on October 18th will not show because they are more than one month away.

4. If your organization uses [Site Level Access \[pg:0092\]](#), volunteers must have the Site the Assignment appears under listed on the [Core tab \[pg:1868\]](#) of their record in order to see the Help Wanted icons for the Assignment. You can learn how to add Sites to the Core tab of a volunteer record in [help topic 2037 \[pg:0094\]](#).

## **Self-scheduling alerts**

If you use the [VicNet \[pg:1724\]](#) or [VicTouch \[pg:1778\]](#) modules, and you allow volunteers to add or remove themselves from schedules, you can send alerts to a specific Volgistics System Operator – and/or the Assignment's Coordinators – each time volunteers add or remove themselves from the schedule for the selected Assignment.

This capability aids in keeping staff and supervisors aware of any schedule changes, and it allows them the most time possible to reassess their service needs.

### **If a volunteer schedules themselves for this assignment**

Use this section if you want to send alerts when volunteers choose to *add* themselves to the schedule for this Assignment.

#### Send an alert to the Volgistics mailbox for this Volgistics operator

Marking this checkbox will cause an automatic alert to be sent to the [In Box \[pg:0303\]](#) tab of the Volgistics Mailbox whenever volunteers

*add*

themselves to this Assignment's schedule. The alert will be visible to all operators who share the mailbox, but will show as being *To* the [System Operator \[pg:0065\]](#) you choose from the dropdown list.

#### **Hint:**

If there are multiple Volgistics System Operators who want to receive the alerts, or if the System Operators want to receive the alerts by email or text message, you can make each of these System Operators [Coordinators \[pg:0163\]](#) for this Assignment. Then select the option below to send alerts to the Assignment's Coordinators.

#### Send an alert to this assignment's Coordinators

Marking this checkbox will cause an automatic alert to be sent to the Coordinators for this Assignment each time volunteers *add* themselves to the schedule for this Assignment. If your account has [enabled text messaging \[pg:0321\]](#), and the Coordinator has [opted-in to text messaging \[pg:0323\]](#), then the alert will be sent as a text message. Otherwise, the Coordinator will receive the alert by email.

If the Assignment has more than one Coordinator, the alerts will go to each of them. If a Coordinator does not have an email address in their Coordinator record, the alerts cannot be sent to them.

#### Send these alerts for

If you want to send these automatic alerts for all volunteers who add themselves to this schedule, select "Any volunteer who schedules themselves."

Alternatively, you may want to send these automatic alerts only when certain types of volunteers add themselves to this schedule. For example, you may only want to send these alerts for "Junior" volunteers and not "Adults." In this case, choose "Only volunteers who have," and then select a [Flag \[pg:0212\]](#), [Type \[pg:0212\]](#), or [Kind \[pg:1909\]](#) value that identifies the type of volunteers for whom these alerts are to be sent. When you choose the "Only for volunteers who have" option, automatic alerts will not be sent when volunteers who do not have the selected Flag, Type or Kind add themselves to this Assignment's schedule.

### **If a volunteer removes themselves from this assignment's schedule**

Use this section if you want to send alerts when volunteers choose to *remove* themselves from the schedule for this Assignment.

#### Send an alert to the Volgistics mailbox for this Volgistics operator

Marking this checkbox will cause an automatic alert to be sent to the [In Box \[pg:0303\]](#) tab of the Volgistics Mailbox whenever volunteers

*remove*

themselves from this Assignment's schedule. The alert will be visible to all operators who share the mailbox, but will show as being *To* the [System Operator \[pg:0065\]](#) you choose from the dropdown list.

#### **Hint:**

If there are multiple Volgistics System Operators who want to receive the alerts, or if the System Operators want to receive the alerts by email or text message, you can make each of these System Operators [Coordinators \[pg:0163\]](#) for this Assignment. Then select the option below to send alerts to the Assignment's Coordinators.

#### Send an alert to this assignment's Coordinators

Marking this checkbox will cause an automatic alert to be sent to the Coordinators for this Assignment each time volunteers *remove* themselves from the schedule for this Assignment. If your account has [enabled text messaging \[pg:0321\]](#), and the Coordinator has [opted-in to text messaging \[pg:0323\]](#), then the alert will be sent as a text message. Otherwise, the Coordinator will receive the alert by email.

If the Assignment has more than one Coordinator, the alerts will go to each of them. If a Coordinator does not have an email address in their Coordinator record, the alerts cannot be sent to them.

#### Send these alerts for

If you want to send these automatic alerts for all volunteers who remove themselves from this schedule, select "Any volunteer who removes themselves from the schedule."

Alternatively, you may want to send these automatic alerts only when certain types of volunteers remove themselves from the schedule. For example, you may only want to send these alerts for "Junior" volunteers and not "Adults." In this case, choose "Only volunteers who have," and then select a [Flag \[pg:0212\]](#), [Type \[pg:0212\]](#), or [Kind \[pg:1909\]](#) value that identifies the type of volunteers for whom these alerts are to be sent. When you choose the "Only for volunteers who have" option, automatic alerts will not be sent when volunteers who do not have the selected Flag, Type or Kind remove themselves from the Assignment's schedule.

### **Other options**

### Never include this schedule on online volunteer application forms

If you use [online volunteer application forms \[pg:0413\]](#), you can optionally let new applicants indicate their [schedule preference\(s\) \[pg:1343\]](#) when they apply. Check this box if you do not want [schedule openings \[pg:0776\]](#) for this Assignment to appear on the application form.

### Display volunteer schedule preferences for this assignment

If you collect [online application forms \[pg:0413\]](#) that allow applicants to [choose the schedule openings \[pg:1343\]](#) they want to serve in, you can optionally display their selections on the schedule for this Assignment as shown in [help topic 2134 \[pg:0773\]](#) "Working with Schedule Preferences."

Check this option if you're still scheduling for this Assignment, and you want to see which volunteers have a preference for a schedule opening in this Assignment. You can then easily schedule volunteers based on their preference simply by clicking the *Add to schedule* link that appears on each schedule preference entry.

Leave this option un-checked if you do not want to see volunteer schedule preferences for this Assignment.

### **Make this the default setup**

Click this button if you want all of the *new* Assignment records you add in the future to have the same Schedule Setup settings as the Assignment record you're working on. The current record's Schedule Setup will become the default for any Assignment records you add in the future.

Clicking this button *will not* change the Schedule Setup settings for any Assignment records you have already created.

This button will not appear if your organization uses [Site Level Access \[pg:0092\]](#) and you are a [Site-Level Operator \[pg:1442\]](#). If your organization uses Site Level Access and you are not a Site Level Operator, clicking this button changes the default Schedule Setup settings for new Assignments created at **all** Sites.

### **Related Help**

[Help Topic 1180 \[pg:0746\]](#) - Scheduling Overview

[Help Topic 2099 \[pg:0096\]](#) - Tracking Assignments

[Help Topic 2170 \[pg:1494\]](#) - VIC Self-Scheduling

[Help Topic 2173 \[pg:0103\]](#) - Roles

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## **Can I schedule regular volunteers for duty every-other week?**

Help topic 2235

Added or revised 02-15-2006

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Yes. To schedule volunteers for regular duty every-other week (alternating weeks):

1. Add a volunteer to a schedule from any of the schedule tabs.
2. In the "Schedule a volunteer" box, select "Regular."
3. Check the "Alternate" checkbox under the day (or days) of the week the volunteer serves. For example, if the volunteer servers alternating Wednesdays, check the "Alternate" checkbox under Wednesdays as shown here:

**Schedule a volunteer**

Volunteer:

From:  to

One time:

Regular:

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Every	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1st	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2nd	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3rd	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4th	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5th	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Alternate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Starting the week of:

Note:

4. Using the "Starting the week of:" field, select the date you want the volunteer to be scheduled from. In the example shown above, Mary Bailey is scheduled every-other Wednesday starting on Wednesday February 15, 2006.

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## Around-the-Clock Scheduling

Help topic 2258

Added or revised 01-07-2013

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You can use Volgistics to manage volunteer schedules in programs with around-the-clock operations. Schedules may include entries that span midnight, and shifts up to 24 hours long.

### Scheduling past midnight

Before you can schedule volunteers or openings for shifts that begin before midnight and end after midnight you must [set your hours of operation \[pg:1395\]](#) so they span midnight, or are 12:00 am to 12:00 am (24 hour a day operation).

For example, if your earliest volunteer shifts begin at 8:00 am, and your latest shifts end at 2:00 am, set your hours of operation to 8:00 am and 2:00 am as shown here

Start at:

End at:

Once you've set your hours of operation, you may schedule volunteers and [openings \[pg:0776\]](#) that span midnight simply by choosing the appropriate 'From' and 'To' times. For example, an opening that starts at 10:00 pm and ends at 2:00 am would have 'From' and 'To' times as shown in this example:

**Add an opening**

From: 10:00 p to 2:00 a

Quantity: 2

One time: May 24 2006

Regular:

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Every	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1st	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2nd	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3rd	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4th	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5th	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Alternate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Starting the week of: May 24 2006

Save

### Scheduling 24 hour shifts

Before you can schedule volunteers or openings for shifts that run a full 24 hours, you must [set your hours of operation \[pg:1395\]](#) to be 12:00 am to 12:00 am (24 hour a day operation) as shown here:

Start at: 12:00 am

End at: 12:00 am

Schedule a volunteer or an opening for a 24 hour period by choosing the same time in both the 'From' and 'To' fields on the schedule or opening. For example, if a shifts starts at 7:00 a.m. and runs until 7:00 a.m. the following day, choose 7:00 am as both the 'From' and the 'To' times on the schedule or opening, as shown here:

**Schedule a volunteer**

Volunteer:

From:  to

One time:

Regular:

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Every	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1st	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2nd	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3rd	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4th	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5th	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Alternate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Starting the week of:

Note:

Schedule entries cannot be made for shifts longer than 24 hours. If you need to schedule volunteers for periods of time longer than 24 hours, break the schedule entries into blocks of 24 or fewer hours.

Schedule entries that start before midnight and end after midnight appear on the schedule for the date the entry starts on. For example, a shift that begins at 10:00 pm on May 24 and ends at 2:00 am on May 25th appears on the May 24th schedule.

---

## Schedule Reminders

Help topic 2273

Added or revised 02-17-2011

---

If you use the Volgistics scheduling features to schedule volunteers, Volgistics can automatically send monthly or daily schedule reminder messages to scheduled volunteers by email.

This is an example of what a schedule reminder email message might look like:



Thank you for participating as a (your agency name) volunteer. Please be sure you have these upcoming volunteer schedule shifts on your calendar:

08-02-2006 (Wednesday)  
8:00 a to 11:00 a  
Info Desk [Sample Agency Name\Administration]

08-09-2006 (Wednesday)  
8:00 a to 11:00 a  
Info Desk [Sample Agency Name\Administration]

08-16-2006 (Wednesday)  
8:00 a to 11:00 a  
Info Desk [Sample Agency Name\Administration]

08-23-2006 (Wednesday)  
8:00 a to 11:00 a  
Info Desk [Sample Agency Name\Administration]

08-30-2006 (Wednesday)  
8:00 a to 11:00 a  
Info Desk [Sample Agency Name\Administration]

If you cannot serve any of these scheduled times, please remove yourself from the schedule at least five days in advance online at VicNet, or call Cathy in the volunteer office at 555-1234.

Thank you!

You received this mail through your affiliation with Sample Agency Name. You may change your email address or email preferences with Sample Agency Name at <http://www.volgistics.com/ex/syst.dll?ACT=30&KEY=0000&PW=000000>

If a volunteer is scheduled more than once for the day or month a reminder is sent, they receive just one reminder email that includes all of their scheduled assignments and times, as shown in the example above.

By default, Volgistics will not send schedule reminders to volunteers until you setup this feature. To setup schedule reminders, choose the assignments you want to send reminders for, and then setup the schedule reminder messages.

### **Choose the assignments you want to send reminders for**

You can include just certain assignments in your schedule reminders (you might have some assignments for which you do not want reminders sent). You use the 'Schedule reminders' checkbox in the Assignment records to specify which assignments schedule reminders should be sent for, and which they should not. The 'Schedule reminders' checkbox is located in the Name box on the Assignment tab.

To include a specific assignment in schedule reminders:

1. Choose Assignments from the [menu \[pg:0215\]](#).
2. Select the Assignment.
3. Check the 'Schedule reminders' checkbox on the Assignment tab.

**Ticket booth**

Assignment | Coordinators | Profile | Description | Volunteers | Schedule

Save | Cancel | Combine, move or delete

**Name**

Site: **Monroe County**  
 Place: **Volunteer Services**  
 Assignment: Ticket booth  
 Impact:   
 Status: Active   Advertise  Sign-in option  Schedule reminders

4. Click the **Save** button.

In the example shown above, volunteers scheduled in the 'Ticket Booth' assignment will receive schedule reminders because the 'Schedule reminders' checkbox is checked for that assignment.

### Setup the schedule reminder messages

To setup schedule reminder messages for volunteers:

1. Choose Setup from the [menu \[pg:0215\]](#).
2. Select 'Scheduling.'
3. To setup automatic monthly schedule reminders for volunteers, select 'Monthly and on-demand volunteer reminders.' To setup automatic daily schedule reminders for volunteers, select 'Daily volunteer reminders.'
4. Follow the instructions on the Setup page to setup the reminder messages.
5. Click the **Save** button.

If you track volunteer coordinators in Volgistics, you can also send coordinators schedule reminders too.

To setup schedule reminder messages for coordinators:

1. Choose Setup from the [menu \[pg:0215\]](#).
2. Select 'Scheduling.'
3. To setup automatic monthly schedule reminders for coordinators, select 'Monthly and on-demand coordinator reminders.' To setup automatic daily schedule reminders for coordinators, select 'Daily coordinator reminders.'
4. Follow the instructions on the Setup page to setup the reminder messages.
5. Click the **Save** button.

You can choose to send just monthly reminders, just daily reminders, or both monthly and daily reminders.

You can choose to send just volunteer schedule reminders, just coordinator schedule reminders, or both volunteer and coordinator schedule reminders.

### Who will receive automatic schedule reminders

If you use volunteer schedule reminders, your schedule reminder messages are sent overnight on the frequency you choose (for example, on the 25th of every month for the coming month). Reminders will be sent automatically to every volunteer who...

- Has an email address in their record.
- Is scheduled on the day or month for which the reminder is sent.
- Has not [declined schedule reminder email \[pg:0409\]](#) messages.

Email reminders cannot be sent to volunteers for whom an email address is not entered.

If you schedule both individuals and groups in Volgistics, schedule reminders are sent to all *Individual* volunteers, and to the group contact for each [Group record \[pg:1909\]](#) scheduled. In the case of *Group* records (where you do not track the group members individually), there is not a way to send automatic schedule reminders to the separate members of a group you've scheduled, as their individual email addresses are not tracked. Instead the group contact would receive the automatic schedule reminder.

If you use coordinator schedule reminders, your schedule reminder messages are sent overnight on the frequency you choose (for example, on the 25th of every month for the coming month). Reminders will be sent automatically to every coordinator who...

- Has an email address in their record.
- Has an assignment with one or more volunteers scheduled on the day or month for which the reminder is sent.
- Has not [declined schedule reminder email \[pg:0409\]](#) messages.

Email reminders cannot be sent to coordinators for whom an email address is not entered.

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## How to Edit a Schedule Entry

Help topic 2536

Added or revised 10-28-2016

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If you find that your scheduling needs have changed or that a schedule entry contains a mistake, it is possible to make changes to an existing schedule entry. This help topic explains how to edit a schedule entry.

### Editing a *one time* schedule entry

If a volunteer has been scheduled to serve for one shift on one date, you can edit the schedule entry like this:

1. Choose Schedule from the main [menu \[pg:0215\]](#).
2. Go to the date of the schedule entry.

3. Locate the entry that needs editing.
4. Click the orange "Edit" link next to the entry.

5. In the "Schedule a volunteer" box that is displayed, make any necessary changes to the entry. You can edit the volunteer; Assignment; times of the shift; frequency of the shift; add or change a [schedule note \[pg:0750\]](#), or schedule a [substitute \[pg:0745\]](#).
6. Click the **Save** button to save your changes.

### Editing an *ongoing* schedule entry

You can also edit an entry if it is for an ongoing period. For example, if a volunteer usually serves in an Assignment every Saturday from 9:00 am to 12:00 pm, but he or she is no longer able to serve at this time and must begin serving from 10:00 am until 1:00 pm, you can edit the schedule entry to reflect this. You would do so like this:

1. Choose Schedule from the main [menu \[pg:0215\]](#).
2. Go to the date on which the change needs to be made for the schedule entry.
3. Locate the entry that needs editing.
4. Click the orange "Edit" link next to the entry.
5. In the "Schedule a volunteer" box that is displayed, make any changes in the Volunteer; Assignment; From, and/or To fields.
6. Click the **Save** button to save your changes.

Note that schedule entries are different from [schedule openings \[pg:0776\]](#), and that editing a schedule entry will not edit openings that are part of the schedule.

---

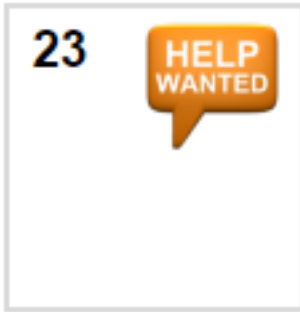
## Why does the "Help Wanted" icon appear for dates without any openings

Help topic 2538

Added or revised 06-09-2016

---

When volunteers are permitted to [self-schedule \[pg:1494\]](#) through [VicNet \[pg:1724\]](#) or [VicTouch \[pg:1778\]](#), they will see a *Help Wanted* graphic on the dates on which it is possible for them to sign-up to serve.



Two possible conditions will lead to a volunteer seeing a *Help Wanted* icon on a date. Either the Assignment has [schedule openings \[pg:0776\]](#) on that date, or the Assignment is set up to allow scheduling for any times.

If no openings have been added for a specific Assignment on a certain date, but a *Help Wanted* icon appears on that date, it is likely that the Assignment's [Rules tab \[pg:0781\]](#) is set to permit scheduling for any times. To check whether volunteers are able to self-schedule for openings only or at any times, take the following steps:

1. Choose Assignments from the main [menu \[pg:0215\]](#).
2. Click on the name of the Assignment for which the *Help Wanted* icon is appearing.
3. Go to the Assignment's Rules tab.
4. Under *Allow Scheduling for...* determine when volunteers are able to self-schedule.

A screenshot of a web interface showing the 'Rules' tab for an assignment. At the top, there is a dropdown menu labeled 'This Type:' with 'Adult' selected. Below this, there is a radio button option: 'Any volunteer can schedule themselves or be scheduled by a coordinator'. Underneath, the section 'Allow scheduling for...' is displayed. It has two radio button options: 'Openings only' and 'Any times on these days'. The 'Any times on these days' option is selected. Below this, there are seven checkboxes for days of the week: 'Sundays' (unchecked), 'Mondays' (checked), 'Tuesdays' (checked), 'Wednesdays' (checked), 'Thursdays' (checked), 'Fridays' (checked), and 'Saturdays' (unchecked). At the bottom of the section, there is a heading 'Self-scheduling alerts' followed by the text 'If a volunteer *schedules* themselves for this assignment.'

5. If necessary, make any changes.

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# How to Schedule Substitutes for Regularly Scheduled Volunteers

Help topic 2555

Added or revised 10-18-2016

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Volgistics comes with a built-in feature to make [scheduling substitute volunteers \[pg:0745\]](#) for short term absences easier. If your volunteer will only be gone a couple of days, this way works best. However, if your regularly scheduled volunteers will be gone for a number of days, you would need to schedule the substitute on each day the regularly scheduled volunteer will be gone. While this works fine, here is another way you can schedule a substitute for an extended time.

For the example, we will show how to schedule a replacement volunteer from May 23 through June 6, for an assignment that takes place every weekday.

1. Select Assignments from the Menu.
2. Go to the assignment the regularly scheduled volunteer fills.
3. Click on the Schedule tab and navigate to the daily view for the last date the volunteer will serve. For the example, this would be May 22nd.
4. Click the

## Edit

link in the row where the volunteer's name appears. This opens the "Edit a schedule entry" box. Note, if the volunteer is filling an [opening \[pg:0776\]](#), be sure to click the **Edit** link on the left. The link on the right will open the "Edit an opening" box used for changing the opening's settings.

						Edit	Remove	Edit	Delete	
	4:00 p	11:30 p	<input type="checkbox"/>	Saconiwelsky, Larry (5:00 p to 11:30 p)	✓		Edit	Remove	Edit	Delete
	4:00 p	11:30 p	<input type="checkbox"/>	Vanbeek, Allison	✓	<b>Edit</b>	Remove	Edit	Delete	

9 volunteers scheduled, 0 unfilled openings Remove all

5. In the "Edit a schedule entry" box, select Ending then the last date the volunteer will serve. For the example, this would be May 22.

## Edit a schedule entry

Volunteer:

From:  to

Frequency:  One time:

Regular:

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Every	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
1st	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2nd	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3rd	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4th	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5th	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Alternate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Time period: Starting:

Ongoing

Ending:

Note:

Substitute:

Linked to opening number 10 which begins 03-22-2011

6. Click the **Save** button.
7. Go to the next date the regular volunteer would normally be scheduled. For the example, you could click the **Next day** button to go to the daily schedule for May 23.
8. If the regularly scheduled volunteer was filling an opening, click the "Fill" link for the unfilled opening. Otherwise, use the "Schedule a volunteer" box to place the substitute volunteer on the schedule.
9. Select the substitute volunteer's name and setup the days of the week and times if necessary.
10. In the "Time period" section, select the dates the substitute will start and end their coverage. For the example, this would be May 23 through June 6.

### Fill an opening

Volunteer: Vega, Melissa

From: 4:00 p to 11:30 p

Frequency:  One time: May 23 2012

Regular:

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Every	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
1st	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2nd	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3rd	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4th	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5th	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Alternate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Time period: Starting: May 23 2012

Ongoing

Ending: June 6 2012

This volunteer will be linked to opening number 10

Save Cancel

11. Click the **Save** button.

12. Go to the daily view of the schedule for the date the regularly scheduled volunteer will return. For the example, this would be June 7.

13. If the regularly scheduled volunteer was filling an opening, click the "Fill" link for the unfilled opening. Otherwise, use the "Schedule a volunteer" box to place the regular volunteer back on the schedule.

14. Select the returning volunteer's name and setup the days of the week and times if necessary.

15. Check to make sure Regular is selected in the "Frequency" section and Ongoing is selected in the "Time period" section.

16. Click the **Save** button.

#### Related help

[Help Topic 1180 \[pg:0746\]](#) - Scheduling Overview

[Help Topic 2030 \[pg:0758\]](#) - How to Delete Schedule Openings

[Help Topic 2132 \[pg:0766\]](#) - How to Edit a Schedule Opening

[Help Topic 2158 \[pg:0776\]](#) - How do I add schedule openings?

[Help Topic 2536 \[pg:0794\]](#) - How to Edit a Schedule Entry



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## Their Date Archived Set Rule

Help topic 1069

Added or revised 02-20-2010

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This help topic explains how to define a [Set rule \[pg:0853\]](#) based on the 'Date archived' date on the History tab. This date reflects when a volunteer record was archived.

**Only the volunteer records that are currently archived will have a 'Date archived.'** For this reason, this Set rule is useful only in Sets you use with [archived \[pg:1819\]](#) volunteer records.

You create Set rules on the Set Definition page. If you're not already on the Set Definition page you can get there by choosing Sets from the [menu \[pg:0215\]](#), and then clicking the **Create a new set** button.

To create a Set of volunteers based on their date archived, select 'Their date archived' from the "Include volunteers in this set based on" drop down list.

This Set rule can capture volunteers whose date archived is any date, a specific date, in a specified range of dates or months, at least a certain number of days ago, not more than a certain number of days ago, or blank.

### Any date

Choose the "Any date" option to capture all volunteers with any date archived recorded on their History tab (this would include all archived volunteer records, since every archived volunteer record will have a date archived).

### In

Use the second option to pull volunteers with a date archived in a specific month and/or in a specific year. For instance, setup the 'Their date archived' Set rule as shown below to include in a Set only the volunteer records that were archived in 'the previous month':

The screenshot shows a web form titled "Their date archived" with a "Rule" label in the top right. The form has several radio button options: "Any date", "In", "Exactly", "Anytime between", "More than 1 day(s) ago", and "Not more than 1 day(s) ago". The "In" option is selected and circled in red. To the right of the "In" option is a dropdown menu showing "The previous month" and a year dropdown showing "2009", both of which are also circled in red. Below the "Exactly" option are two rows of date pickers: "January", "1", "2010" and "January", "1", "2010" with "and" between them. Below the "Anytime between" option are two rows of date pickers: "January", "1", "2010" and "January", "1", "2010". A "Help" link is in the bottom right corner.

### Exactly / Any time Before / Any time After / Not

Volunteers with a date archived of a specific date, or any date prior to or after a specific date, can be included with the third option. The following example shows a Set rule that would pull all volunteer records that were archived on January 1, 2007. Such a Set might be useful when you need to identify all of the volunteer records that were archived on a specific date, or in a specific year.

Exactly

#### Anytime between

Similarly, if a system operator wants to find all the volunteer records archived during a given work week, they can use the fourth option to include all volunteer records with a date archived anytime between a range of dates. In the image below, the Set rule will capture all volunteers with a date archived between December 24th and December 28th, 2007.

Anytime between     
and

#### More than (-- ) day(s) ago

The "More than (-- ) day(s) ago" option pulls those volunteers with date archived dates more than the specified number of days ago, as of the date the Set is used. Therefore, like the 'previous month' selection in the second option above, the same Set used at different times will pull different groups of volunteers.

#### Not more than (-- ) day(s) ago

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## Their Checklist Set Rule

Help topic 1095

Added or revised 07-06-2009

---

This help topic explains how to define a [set rule \[pg:0853\]](#) based on which Checklist items are due (or will be due) for a volunteer.

You create Set rules on the Set Definition page. If you're not already on the Set Definition page you can get there by choosing Sets from the [menu \[pg:0215\]](#), and then clicking the **Create a new set** button.

To create a Set of volunteers based on whether or not a particular Checklist item is due now (or will soon be due), select 'Their checklist' from the "Include volunteers in this set based on" drop down list.

This rule uses information from the Checklist box on each volunteer's History tab.

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

Save Cancel  Tagged New Previous Next

**Checklist**

Checklist items: Awards:

Application approved  Volunteer of the Year

Attends orientation  10,000 Hours Award

Background check

Department orientation

Drivers license check

Initial interview

Name tag

TB Test

Save Refresh

If you have a Checklist item called "TB Test," you could create a Set that finds all of the volunteers for whom the "TB Test" item is currently due, as it is for the volunteer whose History tab is shown in the illustration above (you know this because the TB Test item is not checked).

This Set rule enables you to create Sets that work the same way as the [Tickler \[pg:0148\]](#) page.

Their (item) checklist item is

Choose this option to create a Set that includes volunteers for whom a particular checklist item is due now; past due; or will soon expire.

Choose a specific Checklist item from the drop-down list to include volunteers for whom that specific item is due; or select "Any" from this drop-down list to include volunteers for whom *any* checklist item is due.

Due now

Check "Due now" if you want to include volunteers for whom the item is due now. This will cause your Set to include all of the volunteers for whom the item is due on whatever date you use this Set.

Due in

Check "Due in" and then select a specific month and year to find all of the volunteers for whom the checklist item is due in the selected month. For example, choose "December 2009" to find all of the volunteers for whom a checklist item will expire (become due) in December 2009.

Due in the next \_\_\_ days

Check this option and then choose the number of days to include all of the volunteers for whom the checklist item will become due within that number of days. For example, choose 30 days to create a Set that includes all of the volunteers for whom the item will expire sometime in the next 30 days. This condition will always start from the date you use this Set. In other words, the Set will always look 30 days ahead of whatever the current date is.

Past due more than \_\_\_ days

Check this option and then choose the number of days to include all of the volunteers for whom the checklist item has been expired. For example, choose 60 days to create a Set that includes all of the volunteers for whom the item has been due for 60 days or more.

If you choose more than one condition, volunteers will appear in your set if they have *any* of the conditions you choose. For example, a Set with the Set rule shown below will include the volunteers for whom the "TB Test" item is either currently due (due now), or whose TB Test will expire anytime in the next 30 days.

The screenshot shows a configuration window titled "Rule" with a light blue background. The main heading is "Their checklist". Below this, there are several options for defining a rule:

- A radio button is selected for "Their **TB Test** checklist item is...".
- Under this selection, there are four sub-options:
  - Due now
  - or  Due in **January** **2009**
  - or  Due in the next **30** days
  - or  Past due more than **1** days
- Below these, there is another radio button option: "They are currently eligible for the **Any** award".

They are currently eligible for the (item) award

Choose this option to create a Set that includes volunteers who are currently eligible for an award.

To find volunteers who are currently eligible for a particular award, choose that award from the drop-down list. To find volunteers who are currently eligible for a any award, choose "Any" from the drop-down list.

Your set will include the volunteers for whom the selected award(s) are currently listed on their Checklist.

The example Set rule shown below will include volunteers who are currently eligible for any award.

---

## Their State/Province Set Rule

Help topic 1096

Added or revised 07-06-2009

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This help topic explains how to define a [set rule \[pg:0853\]](#) based on the volunteer's state or province.

You create Set rules on the Set Definition page. If you're not already on the Set Definition page you can get there by choosing Sets from the [menu \[pg:0215\]](#), and then clicking the **Create a new set** button.

To create a Set of volunteers based on a volunteer's state or province, select 'Their state' (or 'Their province') from the "Include volunteers in this set based on" drop down list.

This Set rule looks at the value in each volunteer's State (or Province) field on their Core tab to determine if a volunteer should be included in the Set. Volunteer's are included only if their state (or province) matches the rule.

**Address**

Street 1:

Street 2:

Street 3:

City:

State:   Zip:

Mail:  No postal mail  No email

Home:

Work:

Cell:

Fax:

Pager:

Other:

Email:

Web site:

Their state (Their province)

Choose "is" to create a Set that includes all of the volunteer's whose state or province matches the entry you choose. Choose "is not" to create a Set that includes all of the volunteers whose state or province is anything other than the entry you choose.

Use the drop-down list to choose the state or province you want to include (or exclude if you chose "is not").

The Set rule shown in the example below includes all of the volunteers who live in Michigan (MI).

**Their State** Rule

Their State  is  is not

The Set rule shown in the example below includes all of the volunteers who do not have a state or province entered in their volunteer record.

---

## Their Date of Last Activity Set Rule

Help topic 1098

Added or revised 02-20-2010

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This help topic explains how to define a [Set rule \[pg:0853\]](#) based on the [Date of last activity \[pg:0076\]](#) date on the Core tab. This date reflects the most recent date that a volunteer had service recorded.

You create Set rules on the Set Definition page. If you're not already on the Set Definition page you can get there by choosing Sets from the [menu \[pg:0215\]](#), and then clicking the **Create a new set** button.

To create a Set of volunteers based on their *date of last activity*, select 'Their date of last activity' from the "Include volunteers in this set based on" drop down list.

This Set rule can capture volunteers whose *date of last activity* is any date, a specific date, in a specified range of dates or months, at least a certain number of days ago, not more than a certain number of days ago, or blank.

### Any date

Choose the "Any date" option to capture all volunteers with any *date of last activity* recorded on their Core tab.

### In

Use the second option to pull volunteers with a *date of last activity* in a specific month and/or in a specific year. For instance, setup the 'Their *date of last activity*' Set rule as shown below to include in a Set only the volunteers who have a *date of last activity* in 'the previous month':

The screenshot shows a configuration window titled "Their date of last activity" with a "Rule" label in the top right. The "In" radio button is selected and circled in red. The dropdown menu for the month is set to "The previous month" and is also circled in red. Other options include "Any date", "Exactly", "Anytime between", "More than 1 day(s) ago", "Not more than 1 day(s) ago", and "Blank". A "Help" link is visible in the bottom right corner.

By choosing to include volunteers with a *date of last activity* in 'the previous month,' you can run the same report for this same Set of volunteers each month and Volgistics will pick up only volunteers with *dates of last activity* in the month prior to the month the report is run.

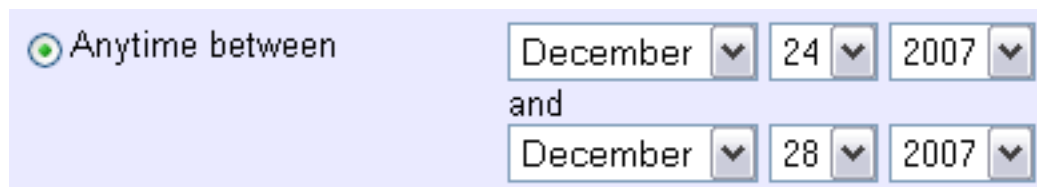
### Exactly / Any time Before / Any time After / Not

Volunteers with a *date of last activity* of a specific date, or any date prior to or after a specific date, can be included with the third option. The following example shows a Set rule that would pull all volunteers with a *date of last activity* of January 1, 2007. Such a Set might be useful when trying to find all volunteers who served *most recently* on a particular date.

The screenshot shows the "Exactly" option selected. The dropdown menu is set to "January", the day dropdown is set to "1", and the year dropdown is set to "2007".

### Anytime between

Similarly, if a system operator wanted to find all of the volunteers who served most recently during a given work week, they can use the fourth option to include all volunteer records with a *date of last activity* anytime between a range of dates. In the image below, the Set rule will capture all volunteers with a *date of last activity* between December 24th and December 28th, 2007.



#### More than (-- day(s) ago

The "More than (-- day(s) ago" option pulls those volunteers with a *date of last activity* more than the specified number of days ago, as of the date the Set is used. Therefore, like the 'previous month' selection in the second option above, the same Set used at different times will pull different groups of volunteers.

#### Not more than (-- day(s) ago

The "Not more than (-- day(s) ago" option pulls those volunteers with a *date of last activity* not more than the specified number of days ago, as of the date the Set is used. Again, the same Set used at different times will pull different groups of volunteers.

#### Blank

Finally, the 'Their date of last activity' Set rule can include volunteers in a Set when they do not have a *date of last activity* recorded on their Core tab.

#### **Related help**

---

## **Their Email Set Rule**

Help topic 1128

Added or revised 03-20-2008

---

This help topic explains how to define a [Set rule \[pg:0853\]](#) based on the information recorded in the Email field on the Core tab.

You create Set rules on the Set Definition page. If you're not already on the Set Definition page you can get there by choosing Sets from the [menu \[pg:0215\]](#), and then clicking the **Create a new set** button.

To create a Set of volunteers based on their Email select 'Their email' from the "Include volunteers in this set based on" drop down list.

This Set rule can capture volunteers who do or do not have an email address recorded in the Email field, select volunteers based on their email preferences, or include volunteers who do or do not have the 'No email' checkbox marked on the Core tab.

To include volunteers who have an email address recorded on their Core tab, define the Set rule like this:

**Their email**

They  have  do not have an email address recorded

They  want to receive  do not want to receive  email

'No email'  is checked  is not checked

To capture volunteers who have indicated an [email preference \[pg:1327\]](#) not to receive a certain [type of email \[pg:1321\]](#), use the second option in this Set rule. In the example below, the Set created from this rule will include volunteers who prefer not to receive [Schedule reminder \[pg:0791\]](#) email messages.

They  want to receive  do not want to receive  email

If the 'No email' box on the Core tab is checked for a volunteer, it means that that volunteer cannot be contacted via email. In this case, the Email field is not empty simply because the organization is missing information; the volunteer has specifically stated that they cannot be reached in this way. This can be an important distinction.

The image below shows how to define a rule that will capture all volunteers for whom the 'No email' box is checked.

---

## Their Email Validity Set Rule

Help topic 1129

Added or revised 03-20-2008

---

This help topic explains how to define a [Set rule \[pg:0853\]](#) based on the validity of the information recorded in the Email field on the Core tab.

You create Set rules on the Set Definition page. If you're not already on the Set Definition page you can get there by choosing Sets from the [menu \[pg:0215\]](#), and then clicking the **Create a new set** button.

To create a Set of volunteers based on their Email validity select 'Their email validity' from the "Include volunteers in this set based on" drop down list.

This Set rule can capture volunteers whose email addresses have, through [Volgistics' email validity tracking features \[pg:0377\]](#), been classified as green (good), yellow (some failures), red (bad) and/or white (undetermined).



You can mark as many of the validity classifications as you'd like.

### is any of these...

If you choose the "is any of these..." option, the Set will include volunteers with any of the chosen email address validity icons. For example, you would choose to include volunteers with green, yellow or white email address validity icons like this:

The screenshot shows a configuration window titled "Their email validity" with a "Rule" label in the top right. On the left, there are two radio button options: "is any of these..." (selected) and "is not any of these...". Below these is the text "Their email address validity". On the right, there is a list of six email validity categories, each with a checkbox and a colored square icon: (undetermined) with a white square, (good) with a green square, (some failures) with a yellow square, (invalid email address) with a red square, (recipient opted-out) with a red square, and ('No email' is checked) with a red square. A "Help" link is located in the bottom right corner.

### is not any of these...

---

## Their City Set Rule

Help topic 1130

Added or revised 03-20-2008

---

This help topic explains how to define a [Set rule \[pg:0853\]](#) based on what city is recorded on the Core tab in the volunteer record.

You create Set rules on the Set Definition page. If you're not already on the Set Definition page you can get there by choosing Sets from the [menu \[pg:0215\]](#), and then clicking the **Create a new set** button.

To create a Set of volunteers based on city, select 'Their city' from the "Include volunteers in this set based on" drop down list.

### Is

To find volunteers who have a specific city recorded in the City field, select 'Is' and enter the city name in the "Is" field.

For example, to include in a Set all volunteers with "Chicago" recorded in their City field, define the rule as in the image below.

## Their City

- Is
- Is blank

[Is blank](#)

---

## Their Zip Set Rule

Help topic 1131

Added or revised 03-20-2008

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This help topic explains how to define a [Set rule \[pg:0853\]](#) based on what zip code is recorded on the Core tab in the volunteer record.

You create Set rules on the Set Definition page. If you're not already on the Set Definition page you can get there by choosing Sets from the [menu \[pg:0215\]](#), and then clicking the **Create a new set** button.

To create a Set of volunteers based on zip code, select 'Their zip' from the "Include volunteers in this set based on" drop down list.

[Is exactly](#)

To find volunteers who have a specific zip code recorded in the Zip field, enter the zip code in the "Is exactly" field.

For example, to include in a Set all volunteers with "47401" recorded in their Zip field, define the rule as in the image below.

## Their Zip

- Is exactly
- Starts with
- Is blank

[Starts with](#)

To include volunteers whose Zip field starts with a particular digit or digits, choose the second option and enter as much of the zip code as you know.

---

## Their Age Set Rule

Help topic 1132

Added or revised 03-20-2008

---

This help topic explains how to define a [Set rule \[pg:0853\]](#) based on the age recorded in the Age field or the date recorded in the Date of birth field on the Profile tab in the volunteer record. If an organization uses the Date of birth field to [track volunteer date of birth \[pg:1861\]](#), Volgistics automatically calculates a volunteer's age, based on the date entered in that field. If an organization does not use the Date of birth field, they can manually enter a volunteer's age in the Age field; however, this number will not be automatically updated by Volgistics since the system does not know the volunteer's date of birth.

You create Set rules on the Set Definition page. If you're not already on the Set Definition page you can get there by choosing Sets from the [menu \[pg:0215\]](#), and then clicking the **Create a new set** button.

To create a Set of volunteers based on age, select 'Their age' from the "Include volunteers in this set based on" drop down list.

The 'Their age' Set rule can find volunteers of an exact age; within a range of ages; with a date of birth before or after a specific date; with a date of birth within a range of dates, or with an incomplete Date of birth field entry.

**Their Age** Rule

Their age is  and older

Their age is at least  and not more than

Their date of birth is

Their date of birth is between   and

The Date of birth is incomplete in their record

### Their age is

The first option is useful when a report should include only volunteers of a specific age, only volunteers of a certain age and older, or only volunteers of a certain age and younger. For example, an organization might want to find out which volunteers are eligible to participate in their senior volunteer program. To capture volunteers who are 55 years old and older, define this Set rule like this:

**Their Age**

Their age is  and older

Their age is at least (--) and not more than (--)

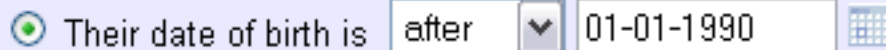
If an organization needed to find their 'young adult' volunteers, they would use this Set rule's second option to capture volunteers between the ages of 18 and 25. It would look like this:

 Their age is at least  and not more than

Their date of birth is (before/after) (xx-xx-xxxx)

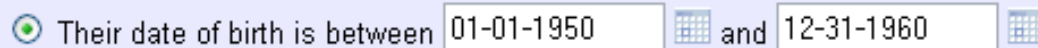
The third option is very similar to the first; however, the first option can find volunteers without any information in the Date of birth field (as long as they have manually entered an accurate number in the Age field). Ultimately, an identical group of volunteers could be pulled by using either of these options. Choosing to define a 'Their age' Set rule by the first or third option is simply a matter of data availability and convenience. The Set pulls information for rules defined with this option from the Date of birth field rather than the Age field on the Profile tab.

With the goal of finding all volunteers born after January 1, 1990, setup the 'Their age' Set rule like this:

 Their date of birth is

Their date of birth is between (xx-xx-xxxx) and (xx-xx-xxxx)

Just as options one and three are similar; option four can ultimately be setup to pull many or all of the same volunteers as option two. A 'Their age' Set rule configured to find volunteers born between January 1, 1950 and December 31, 1960 would like this:

 Their date of birth is between  and

The Date of birth is incomplete in their record

Finally, the 'Their age' Set rule can capture all volunteers with an incomplete Date of birth in their record, like this:

---

## Their Status Dates Set Rule

Help topic 1133

Added or revised 02-14-2012

---

This help topic explains how to define a [Set rule \[pg:0853\]](#) based on the Status dates recorded in the Dates box on the History tab in the volunteer record.

You create Set rules on the Set Definition page. If you're not already on the Set Definition page you can get there by choosing Sets from the [menu \[pg:0215\]](#), and then clicking the **Create a new set** button.

To create a Set of volunteers based on a Status date, select 'Their status dates' from the "Include volunteers in this set based on" drop down list.

This Set rule can identify volunteers who do or do not have a Status date for a particular Status tracked on the History tab in the volunteer record.

### They have a -- status date that is...

When this type of Set rule is looking for volunteers who do have a Status date for a particular Status, system operators can look for volunteers who have that kind of Status date:

- (a) At all, by selecting the 'Any date' option;
- (b) In a particular month or period of time, by selecting the 'In' option;
- (c) Exactly, Anytime before, or Anytime after a certain date;
- (d) Anytime between specific dates, or
- (e) More than (-- ) days ago, as of the date the Set is used.

### Only if the Notation for the date is

In addition, operators can include only those volunteers who have the Status date with a specific Notation. To create a Set that includes only volunteers who have a Status date with a particular notation, check this checkbox and then choose the Notation from the drop-down list.

### Only if (Spare drop-down) is

If you customized the spare drop-down field for your Date records, you can specify that volunteers must also have a specific Spare-down value to be included in this Set by checking this checkbox and choosing the appropriate value from the drop-down.

### Only if (Spare checkbox) is

If you customized the spare checkbox field for your Date records, you can specify that volunteers must also have a specific Spare-checkbox value to be included in this Set by checking this checkbox and then choosing the appropriate value (checked or not checked).

### Only if (Spare text) is

If you customized the spare text field for your Date records, you can further specify that volunteers must also have a specific Spare text field value to be included in this Set by checking this checkbox and entering the text value. To be included in this Set, volunteers must have an entry in this field that exactly matches whatever you enter here (except that the comparison is not case sensitive, so 'YES' would be the same as 'yes' for example).

For example, the following image shows how one would define a rule to capture all volunteers with an 'Inactive' Status date anytime between January 1, 2009 and December 31, 2009, only if the Notation for the date is 'Moved.'

The screenshot shows a web form titled "Rule" for defining a set rule. The main section is "Their status date". It features several radio button options for date selection: "Any date", "In" (with "Any month" and "Any year" dropdowns), "Exactly" (with "January", "1", and "2009" dropdowns), "Anytime between" (with "January 1 2009" and "December 1 2009" dropdowns), and "More than 1 day(s) ago". Below these are three "and" conditions: "Only if the Notation for the date is Moved" (checked), "Only if Spare dropdown is One", and "Only if Spare checkbox is" (with "Checked" and "Not checked" radio buttons). There is also an "Only if Spare text is" field. At the bottom, there is an option "They do not have any Active status dates". A "Help" link is in the bottom right corner.

### They do not have any -- status dates

Again, the 'Their status dates' Set rule can also pull out all volunteers who do not have a status date for a specified Status. For example, this is how to capture all volunteers who do not have any 'LOA' Status dates:

---

## Their Award Dates Set Rule

Help topic 1134

Added or revised 02-14-2012

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This help topic explains how to define a [Set rule \[pg:0853\]](#) based on the [Award \[pg:1551\]](#) dates recorded in the Dates box on the History tab in the volunteer record.

You create Set rules on the Set Definition page. If you're not already on the Set Definition page you can get there by choosing Sets from the [menu \[pg:0215\]](#), and then clicking the **Create a new set** button.

To create a Set of volunteers based on an Award date, select 'Their award dates' from the "Include volunteers in this set based on" drop down list.

This Set rule can identify volunteers who do or do not have a date for a particular Award recorded on their History tab.

#### They have a -- award date that is...

When this type of Set rule is looking for volunteers who do have an Award date for a particular Award tracked in Volgistics, system operators can look for volunteers who have that kind of Award date:

- (a) At all, by selecting the 'Any date' option;
- (b) In a particular month or period of time, by selecting the 'In' option;
- (c) Exactly, Anytime before, or Anytime after a certain date;
- (d) Anytime between specific dates, or
- (e) More than (--) days ago, as of the date the Set is used.

#### Only if the Notation for the date is

In addition, operators can include only those volunteers who have the Award date with a specific Notation. To create a Set that includes only volunteers who have an Award date with a particular notation, check this checkbox and then choose the Notation from the drop-down list.

#### Only if (Spare drop-down) is

If you customized the spare drop-down field for your Date records, you can specify that volunteers must also have a specific Spare-down value to be included in this Set by checking this checkbox and choosing the appropriate value from the drop-down.

#### Only if (Spare checkbox) is

If you customized the spare checkbox field for your Date records, you can specify that volunteers must also have a specific Spare-checkbox value to be included in this Set by checking this checkbox and then choosing the appropriate value (checked or not checked).

#### Only if (Spare text) is

If you customized the spare text field for your Date records, you can further specify that volunteers must also have a specific Spare text field value to be included in this Set by checking this checkbox and entering the text value. To be included in this Set, volunteers must have an entry in this field that exactly matches whatever you enter here (except that the comparison is not case sensitive, so 'YES' would be the same as 'yes' for example).

For example, a rule seeking to include volunteers who have a '10,000 Hours Award' award date that is any time between January 1, 2000 and December 31, 2008 would be setup like this:

**Their award date** Rule

They have a  award date that is...

Any date

In

Exactly

Anytime between     
and

More than  day(s) ago

and  Only if the Notation for the date is

and  Only if Spare dropdown is

and  Only if Spare checkbox is

Checked

Not checked

and  Only if Spare text is

They do not have any  award dates

[Help](#)

They do not have any -- award dates

Again, this rule can also find volunteers who do not have any Award dates at all, or any Award dates for a particular Award. A Set rule that should include all volunteers without a 'Volunteer of the Year' Award date would look like this:

---

## Their Class Dates Set Rule

Help topic 1135

Added or revised 03-31-2017

---

This help topic explains how to define a [Set rule \[pg:0853\]](#) based on the [Class \[pg:1853\]](#) dates recorded in the Dates box on the History tab in the volunteer record.

You create Set rules on the Set Definition page. If you're not already on the Set Definition page you can get there by choosing Sets from the [menu \[pg:0215\]](#), and then clicking the **Create a new set** button.

To create a Set of volunteers based on their Class dates, select *Their class dates* from the *Include volunteers in this set based on* dropdown list.

This Set rule can identify volunteers who do or do not have a date for a particular Class recorded on their History tab.



### They have a -- class date that is...

When this type of Set rule is looking for volunteers who do have a Class date for a particular Class tracked in Volgistics, [System Operators \[pg:0065\]](#) can look for volunteers who have that kind of Class date:

- (a) At all, by selecting the *Any date* option;
- (b) In a particular month or period of time, by selecting the *In* option;
- (c) Exactly, Anytime before, or Anytime after a certain date;
- (d) Anytime between specific dates, or
- (e) More than (--) days ago, as of the date the Set is used.

### Only if the Notation for the date is

In addition, operators can include only those volunteers who have a Class date with a specific Notation. To create a Set that includes only volunteers who have a Class date with a particular notation, check this checkbox and then choose the Notation from the dropdown list.

### Only if (Spare dropdown) is

If you customized the spare dropdown field for your Date records, you can specify that volunteers must also have a specific spare dropdown value to be included in this Set by checking this checkbox and choosing the appropriate value from the dropdown list.

### Only if (Spare checkbox) is

If you customized the spare checkbox field for your Date records, you can specify that volunteers must also have a specific spare checkbox value to be included in this Set by checking this checkbox and then choosing the appropriate value (checked or not checked).

### Only if (Spare text) is

If you customized the spare text field for your Date records, you can further specify that volunteers must also have a specific Spare text field value to be included in this Set by checking this checkbox and entering the text value. To be included in this Set, volunteers must have an entry in this field that exactly matches whatever you enter here (except that the comparison is not case sensitive, so 'YES' would be the same as 'yes' for example).

For example, a rule seeking to include volunteers who have a 'CPR' class date that is more than 365 days ago would be configured like this:

**Their class date** **Rule**

They have a  class date that is...

Any date

In

Exactly

Anytime between     
and

More than  day(s) ago

and  Only if the Notation for the date is

and  Only if Spare dropdown is

and  Only if Spare checkbox is

Checked

Not checked

and  Only if Spare text is

They do not have any  class dates

[Help](#)

Their do not have any -- class dates

Again, this rule can also find volunteers who do not have any class dates for a particular class. A rule made to include volunteers without any CPR class dates would be defined like this:

---

## Their Dates Set Rule

Help topic 1136

Added or revised 02-14-2012

---

This help topic explains how to define a [Set rule \[pg:0853\]](#) based on the date event dates recorded in the Dates box on the History tab in the volunteer record.

You create Set rules on the Set Definition page. If you're not already on the Set Definition page you can get there by choosing Sets from the [menu \[pg:0215\]](#), and then clicking the **Create a new set** button.

To create a Set of volunteers based on a date event date, select 'Their dates' from the "Include volunteers in this set based on" drop down list.

This Set rule can identify volunteers who do or do not have a date for a particular date event recorded on their History tab.

### They have a -- date that is...

When the 'Their date' Set rule is looking for volunteers who do have a date for a particular date event tracked in Volgistics, system operators can look for volunteers who have that kind of date event date:

- (a) At all, by selecting the 'Any date' option;
- (b) In a particular month or period of time, by selecting the 'In' option;
- (c) Exactly, Anytime before, or Anytime after a certain date;
- (d) Anytime between specific dates, or
- (e) More than (--) days ago, as of the date the Set is used.

### Only if the Notation for the date is

In addition, operators can include only those volunteers who have the Date with a specific Notation. To create a Set that includes only volunteers who have a Dates date with a particular notation, check this checkbox and then choose the Notation from the drop-down list.

### Only if (Spare drop-down) is

If you customized the spare drop-down field for your Date records, you can specify that volunteers must also have a specific Spare-down value to be included in this Set by checking this checkbox and choosing the appropriate value from the drop-down.

### Only if (Spare checkbox) is

If you customized the spare checkbox field for your Date records, you can specify that volunteers must also have a specific Spare-checkbox value to be included in this Set by checking this checkbox and then choosing the appropriate value (checked or not checked).

### Only if (Spare text) is

If you customized the spare text field for your Date records, you can further specify that volunteers must also have a specific Spare text field value to be included in this Set by checking this checkbox and entering the text value. To be included in this Set, volunteers must have an entry in this field that exactly matches whatever you enter here (except that the comparison is not case sensitive, so 'YES' would be the same as 'yes' for example).

An example of something that might be tracked as a Date event is attendance at a volunteer recognition event. If a volunteer attended a date event called 'Volunteer Recognition Banquet' a date event record could be added to their History tab to indicate they attended the event. This Set rule provides the ability to pull together all volunteers with a 'Volunteer Recognition Banquet' date stored in their Dates box.

The following image depicts a rule that would capture all volunteers with a 'Volunteer Recognition Banquet' date that is any time in 2009:

**Their date date** Rule

They have a **Volunteer Recognition Banquet** date that is...

Any date

In **Any month** **2009**

Exactly **January** **1** **2009**

Anytime between **January** **1** **2009**  
and **January** **1** **2009**

More than **1** day(s) ago

and  Only if the Notation for the date is **Advertisement**

and  Only if Spare dropdown is **One**

and  Only if Spare checkbox is  
 Checked  
 Not checked

and  Only if Spare text is

They do not have any **Date of first contact** dates

[Help](#)

They do not have any -- dates

Alternatively, volunteers whose records lack any 'Volunteer Recognition Banquet' date would be captured in a rule setup like this:

## Their Mail Dates Set Rule

Help topic 1137

Added or revised 02-14-2012

This help topic explains how to define a [Set rule \[pg:0853\]](#) based on the Mail dates recorded in the Dates box on the History tab in the volunteer record.

You create Set rules on the Set Definition page. If you're not already on the Set Definition page you can get there by choosing Sets from the [menu \[pg:0215\]](#), and then clicking the **Create a new set** button.

To create a Set of volunteers based on a mail date, select 'Their mail dates' from the "Include volunteers in this set based on" drop down list.

This Set rule can identify volunteers who do or do not have a date for a particular type of mail recorded on their History tab.

They have a -- mail date that is...

When this type of Set rule is looking for volunteers who do have a mail date for a particular type of mail tracked in Volgistics (for example, a newsletter, welcome letter or orientation packet), system operators can look for volunteers who have that kind of mail date:

- (a) At all, by selecting the 'Any date' option;
- (b) In a particular month or period of time, by selecting the 'In' option;
- (c) Exactly, Anytime before, or Anytime after a certain date;
- (d) Anytime between specific dates, or
- (e) More than (--) days ago, as of the date the Set is used.

#### Only if the Notation for the date is

In addition, operators can include only those volunteers who have the Mail Date with a specific Notation. To create a Set that includes only volunteers who have a Mail date date with a particular notation, check this checkbox and then choose the Notation from the drop-down list.

#### Only if (Spare drop-down) is

If you customized the spare drop-down field for your Date records, you can specify that volunteers must also have a specific Spare-down value to be included in this Set by checking this checkbox and choosing the appropriate value from the drop-down.

#### Only if (Spare checkbox) is

If you customized the spare checkbox field for your Date records, you can specify that volunteers must also have a specific Spare-checkbox value to be included in this Set by checking this checkbox and then choosing the appropriate value (checked or not checked).

#### Only if (Spare text) is

If you customized the spare text field for your Date records, you can further specify that volunteers must also have a specific Spare text field value to be included in this Set by checking this checkbox and entering the text value. To be included in this Set, volunteers must have an entry in this field that exactly matches whatever you enter here (except that the comparison is not case sensitive, so 'YES' would be the same as 'yes' for example).

For example, an organization might add a mail date record to a volunteer's record when they mail them a volunteer orientation packet. The 'Their mail dates' Set rule is useful when tracking which volunteers have been mailed a volunteer orientation packet.

A rule seeking to include volunteers who have an 'Orientation packet' mail date that is on any date would be setup like this:

**Their mail date**

They have a  mail date that is...

Any date

In

Exactly

Anytime between     
and

More than  day(s) ago

Only if the Notation for the date is

They do not have any  mail dates

They do not have any -- mail dates

Again, this rule can also find volunteers who do not have any mail dates for a particular type of mail. A 'Their mail dates' Set rule made to include volunteers without any 'Newsletter' mail dates would be defined like this:

---

## Their Mandatory Service Set Rule

Help topic 1138

Added or revised 10-07-2016

---

This help topic explains how to define a [Set rule \[pg:0853\]](#) based on the [Mandatory service \[pg:1419\]](#) data recorded on the Service tab in the volunteer record.

You create Set rules on the Set Definition page. If you're not already on the Set Definition page you can get there by choosing Sets from the [menu \[pg:0215\]](#), and then clicking the **Create a new set** button.

To create a Set of volunteers based on mandatory service, select 'Their mandatory service' from the "Include volunteers in this set based on" drop down list.

### Their mandatory service

This Set rule can include volunteers based on the mandatory service program; whether or not 'Completed' is checked; hours remaining; hours performed; hours required; starting date; due by date; completed on date, and whether they have no mandatory service records. Mark as many of the options as necessary.

Program is

Use this option to include only volunteers who have been assigned to a particular mandatory service program.

#### Completed

Use this option to include either volunteers for whom 'Completed' is or is not checked in the Mandatory Service box on the Service tab in the volunteer record.

#### Hours remaining are

Mark this option to include volunteers based on the number of hours remaining in their service mandate. Choose 'At least,' 'Exactly' or 'Fewer than' and enter a number of hours to define this type of rule.

#### Hours performed are

Use this option to include volunteers in the Set based on the number of hours they have completed toward their mandatory service at the time the Set is used.

#### Hours required are

Use this option to include volunteers for whom the number of hours required is 'At least,' 'Exactly' or 'Fewer than' a number of hours you specify.

#### Starting date is in

Mark this option to include volunteers in the Set based on the recorded month and/or year in which their mandatory service is to start.

#### Due by date is in

Mark this option to include volunteers in the Set based on the recorded month and/or year in which their mandatory service is due.

#### Completed on date is in

Use this option to include volunteers for whom the 'Completed on' date is in the month and/or year you specify.

#### They have no mandatory service records

To find all volunteers who have no mandatory service records, setup a 'Their mandatory service' Set rule like this:

**Their mandatory service** Rule

<input type="checkbox"/> Program is	State University Student Program
<input type="checkbox"/> Completed	Completed is not checked
<input type="checkbox"/> Hours remaining are	At least 0:00
<input type="checkbox"/> Hours performed are	At least 0:00
<input type="checkbox"/> Hours required are	At least 0:00
<input type="checkbox"/> Starting date is in	Any month 2007
<input type="checkbox"/> Due by date is in	Any month 2007
<input type="checkbox"/> Completed on date is in	Any month 2007
<input checked="" type="checkbox"/> They have no mandatory service records	

As another example of the 'Their mandatory service' Set rule, the image below depicts a rule that will capture volunteers in the 'State University Student Program' for whom 'Completed' is not checked; at least 25 hours of mandatory service are remaining; at least 30 hours are required; their mandatory service starting date is in September 2007, and their due by date is in January 2008.

---

## Their Date Entered Set Rule

Help topic 1139

Added or revised 03-20-2008

---

This help topic explains how to define a [Set rule \[pg:0853\]](#) based on the 'Date entered' date on the History tab. This date reflects when a volunteer record was first added to the Volgistics database.

You create Set rules on the Set Definition page. If you're not already on the Set Definition page you can get there by choosing Sets from the [menu \[pg:0215\]](#), and then clicking the **Create a new set** button.

To create a Set of volunteers based on their date entered, select 'Their date entered' from the "Include volunteers in this set based on" drop down list.

This Set rule can capture volunteers whose date entered is any date, a specific date, in a specified range of dates or months, at least a certain number of days ago, not more than a certain number of days ago, or blank.

### Any date

Choose the "Any date" option to capture all volunteers with any date entered recorded on their History tab.

### In

Use the second option to pull volunteers with a date entered in a specific month and/or in a specific year. For instance, setup the 'Their date entered' Set rule as shown below to include in a Set only the volunteers who have a date entered in 'the previous month':



### Their date entered

Any date

In The previous month  Any year

Exactly  January  1  2007

Anytime between  January  1  2007   
and  
 January  1  2007

More than  1  day(s) ago

Not more than  1  day(s) ago

Blank

By choosing to include volunteers with a date entered in 'the previous month,' you can run the same report for this same Set of volunteers each month and Volgistics will pick up only volunteers with dates entered in the month prior to the month the report is run.

#### Exactly / Any time Before / Any time After / Not

Volunteers with a date entered of a specific date, or any date prior to or after a specific date, can be included with the third option. The following example shows a Set rule that would pull all volunteers with a date entered of January 1, 2007. Such a Set might be useful when trying to manage all volunteers whose applications were received on a particular date.

Exactly  January  1  2007

#### Anytime between

Similarly, if a system operator is not sure when they received a particular application, but they know that a volunteer application was received during a given work week, they can use the fourth option to include all volunteer records with a date entered anytime between a range of dates. In the image below, the Set rule will capture all volunteers with a date entered between December 24th and December 28th, 2007.

Anytime between  December  24  2007   
and  
 December  28  2007

### More than (-- ) day(s) ago

The "More than (-- ) day(s) ago" option pulls those volunteers with date entered dates more than the specified number of days ago, as of the date the Set is used. Therefore, like the 'previous month' selection in the second option above, the same Set used at different times will pull different groups of volunteers.

### Not more than (-- ) day(s) ago

The "Not more than (-- ) day(s) ago" option pulls those volunteers with date entered dates not more than the specified number of days ago, as of the date the Set is used. Again, the same Set used at different times will pull different groups of volunteers.

### Blank

---

## **Their Start Date Set Rule**

Help topic 1140

Added or revised 03-20-2008

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This help topic explains how to define a [Set rule \[pg:0853\]](#) based on the 'start date' recorded on the History tab. By default, this date reflects when a volunteer record was first given an 'Active' Status; however, [start dates \[pg:1890\]](#) can be customized by Volgistics system operators.

You create Set rules on the Set Definition page. If you're not already on the Set Definition page you can get there by choosing Sets from the [menu \[pg:0215\]](#), and then clicking the **Create a new set** button.

To create a Set of volunteers based on their start date, select 'Their start date' from the "Include volunteers in this set based on" drop down list.

This Set rule can capture volunteers whose start date is any date, a specific date, in a specified range of dates or months, at least a certain number of days ago, not more than a certain number of days ago, or blank.

### Any date

Choose the "Any date" option to capture all volunteers with any 'start date' recorded on their History tab.

### In

Use the second option to pull volunteers with a start date in a specific month and/or in a specific year. For instance, setup the 'Their start date' Set rule as shown below to include in a Set only the volunteers who have a start date in 'the current month':

**Their start date**

Any date

In The current month  Any year

Exactly  January  1  2007

Anytime between

January  1  2007

and

January  1  2007

More than  1  day(s) ago

Not more than  1  day(s) ago

Blank

By choosing to include volunteers with a start date in 'the current month,' you can run the same report for this same Set of volunteers each month and Volgistics will pick up only volunteers with start dates in the month the report is run.

Exactly / Any time before / Any time after / Not

Volunteers with a 'start date' of a specific date, or any date prior to or after a specific date, can be included in a Set with the third 'Their start date' Set rule option. The following example shows a Set rule that would pull all volunteers with a start date of December 15, 2007.

Exactly  December  15  2007

Anytime between

If a system operator is not sure of a volunteer's start date, but they know that their start date was during a given work week, they can use the fourth option to include all volunteer records with a start date anytime between a range of dates. In the image below, the Set rule will capture all volunteers with a 'start date' between December 10th and December 14th, 2007.

Anytime between

December  10  2007

and

December  14  2007

More than (-- ) day(s) ago

The "More than (-- ) day(s) ago" option pulls those volunteers with start dates more than the specified number of days ago, as of the date the Set is used. Therefore, like the 'current month' selection in the second option above, the same Set used at different times will pull different groups of volunteers.

## Not more than (--) day(s) ago

The "Not more than (--) day(s) ago" option pulls those volunteers with start dates not more than specified number of days ago, as of the date the Set is used. Again, the same Set used at different times will pull different groups of volunteers.

## Blank

---

# Their Stop Date Set Rule

Help topic 1141

Added or revised 03-20-2008

---

This help topic explains how to define a [Set rule \[pg:0853\]](#) based on the 'stop date' recorded on the History tab. By default, this date reflects when a volunteer record was first given an 'Inactive' Status; however, [stop dates \[pg:1890\]](#) can be customized by Volgistics system operators.

You create Set rules on the Set Definition page. If you're not already on the Set Definition page you can get there by choosing Sets from the [menu \[pg:0215\]](#), and then clicking the **Create a new set** button.

To create a Set of volunteers based on their stop date, select 'Their stop date' from the "Include volunteers in this set based on" drop down list.

This Set rule can capture volunteers whose stop date is any date, a specific date, in a specified range of dates or months, at least a certain number of days ago, not more than a certain number of days ago, or blank.

## Any date

Choose the "Any date" option to capture all volunteers with any 'stop date' recorded on their History tab.

## In

Use the second option to pull volunteers with a stop date in a specific month and/or in a specific year. For instance, setup the 'Their stop date' Set rule as shown below to include in a Set only the volunteers who have a stop date in 'any month' in 'the previous year':

## Their stop date

Any date

In Any month The previous year

Exactly January 1 2007

Anytime between January 1 2007  
and January 1 2007

More than 1 day(s) ago

Not more than 1 day(s) ago

Blank

By choosing to include volunteers with a stop date in 'any month' in 'the previous year' you can run the same report for this same Set of volunteers each year and Volgistics will pick up only volunteers with stop dates in the year prior to the year the report is run.

### Exactly / Any time before / Any time after / Not

Volunteers with a 'stop date' of a specific date, or any date prior to or after a specific date, can be included in a Set with the third 'Their stop date' Set rule option. The following example shows a Set rule that would pull all volunteers with a stop date anytime before November 15, 2007.

Anytime before November 15 2007

### Anytime between

If a system operator is not sure of a volunteer's stop date, but they know that their stop date was during a given work week, they might use the fourth option to include all volunteer records with a stop date anytime between a range of dates. In the image below, the Set rule will capture all volunteers with a 'stop date' between December 3rd and December 7th, 2007.

Anytime between December 3 2007  
and December 7 2007

### More than (-- day(s) ago

The "More than (-- day(s) ago" option pulls those volunteers with stop dates more than the specified number of days ago, as of the date the Set is used. Therefore, like the 'any month' in 'the previous year' selection in the second option above, the same Set used at different times will pull different groups of volunteers.

## Not more than (-- ) day(s) ago

The "Not more than (-- ) day(s) ago" option pulls those volunteers with stop dates not more than specified number of days ago, as of the date the Set is used. Again, the same Set used at different times will pull different groups of volunteers.

## Blank

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# Their Years of Service Set Rule

Help topic 1142

Added or revised 03-20-2008

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This help topic explains how to define a [Set rule \[pg:0853\]](#) based on the 'years of service' statistic recorded on the volunteer record's Core tab. By default, this data reflects the period of time a volunteer has been 'Active,' excluding any periods during which a volunteer had any Status other than 'Active.' However, the definition of [years of service \[pg:0077\]](#) can be customized by Volgistics system operators to also include time when volunteers had Status(es) other than 'Active.'

You create Set rules on the Set Definition page. If you're not already on the Set Definition page you can get there by choosing Sets from the [menu \[pg:0215\]](#), and then clicking the **Create a new set** button.

To create a Set of volunteers based on their years of service, select 'Their years of service' from the "Include volunteers in this set based on" drop down list.

This Set rule can capture volunteers whose years of service are at least a specified number of years and/or months; no more than a specified number of years and/or months, or within a range of specified years and/or months.

## Their years of service are at least

The following image demonstrates how to use the 'Their years of service' Set rule to capture volunteers whose 'years of service' are at least 5 years and 6 months.

**Their years of service**

At least 5 years, 6 months

No more than 0 years, 0 months

Between 0 years, 0 months  
and 0 years, 0 months

## Their years of service are no more than

To capture all volunteers with years of service less than or equal to a certain amount of years and/or months, use the second option. For example, define a 'Their years of service' Set rule to pick up volunteers with 2 or fewer years of service like this:

**Their years of service**

At least  years,  months  
 Their Years of service are  No more than  years,  months  
 Between  years,  months  
 and  years,  months

Their years of service are between

Finally, use this type of Set rule to find volunteers with a number of years of service that falls within a range of years and/or months. The image below illustrates a Set rule that would include volunteers with a 'years of service' value from 5 years, 1 month through 9 years, 11 months. In this case, volunteers with 5 years, 0 months and 10 years, 0 months would not be included in the Set.

---

## Their Assignment Cluster Set Rule

Help topic 1143

Added or revised 03-20-08

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This help topic explains how to define a [Set rule \[pg:0853\]](#) based on volunteers' [Assignment clusters \[pg:0934\]](#). This type of Set rule is useful only if an organization has already customized and uses the 'Cluster' field on the Assignment tab. It is especially helpful when there is a need to report on volunteers who perform the same Assignment at multiple Places within an account.

You create Set rules on the Set Definition page. If you're not already on the Set Definition page you can get there by choosing Sets from the [menu \[pg:0215\]](#), and then clicking the **Create a new set** button.

To create a Set of volunteers based on Assignment cluster, select 'Their Assignment cluster' from the "Include volunteers in this set based on" drop down list.

The 'Their Assignment cluster' rule determines whether to include volunteers in the Set based on the data stored in the Assignments box on the Service tab in the volunteer record, as well as the data stored in each Assignment's 'Cluster' field on the Assignment tab.

The first option when creating a Set Rule based on 'Their Assignment cluster' is to include volunteers if they have an Assignment in one of any of the cluster names in the drop down list. Each cluster name that has been added to the 'Cluster' field drop down table options for the Assignment tab will appear in this drop down list.

For example, a volunteer might be assigned to an Assignment called 'Trail Maintenance,' under a Place called 'Conservation' and a Site called 'North.' This 'Trail Maintenance' Assignment might be part of a cluster called 'Trail Maintenance,' which includes all 'Trail Maintenance' Assignments at various Places and Sites. The Assignment tab for that particular Trail Maintenance Assignment might look like this:

Assignment | Coordinators | Profile | Description | Volunteers | Schedule

Save | Cancel | Combine, move or delete

**Name**

Site: **North**  
 Place: **Conservation**  
 Assignment: Trail Maintenance  
 Cluster: Trail Maintenance  
 Status: Active  Advertise  Sign-in option  Schedule reminders

When this Assignment is added to a volunteer's Service tab, the volunteer will have an assignment in the 'Trail Maintenance' cluster.

When defining a 'Their Assignment cluster' Set rule to include all volunteers with an Assignment in the 'Trail Maintenance' cluster, one would setup the rule like this:

**Their Assignment cluster** Rule

They  have an assignment in Trail Maintenance  do not have

Assigned  Inactive  
 Former  Referral  
 Substitute  Preference  
 Trainee

**And** their assignment "From" date is Any date

**And** their assignment "To" date is Any date

They do not have an assignment that is part of an assignment cluster

The Set rule can be further limited to include only volunteers with a specific Role(s) in the Assignment within that cluster, or to include volunteers with a specified Assignment 'From' date or 'To' date in that Assignment.

For example, the following 'Their Assignment cluster' Set rule will include volunteers who have the Role of either 'Assigned' or 'Former' in an Assignment within the 'Trail Maintenance' cluster, and who have an Assignment 'From' date that is on or before December 1, 2007.



They  have  do not have an assignment in

**And their Role in the assignment is**
 Assigned  Inactive  
 Former  Referral  
 Substitute  Preference  
 Trainee

**And their assignment "From" date is**

**And their assignment "To" date is**

They do not have an assignment that is part of an assignment cluster

---

## Their Schedule Set Rule

Help topic 1144

Added or revised 09-12-14

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This help topic explains how to define a [Set rule \[pg:0853\]](#) based on when a volunteer is/was scheduled.

You create Set rules on the Set Definition page. If you're not already on the Set Definition page you can get there by choosing Sets from the [menu \[pg:0215\]](#), and then clicking the **Create a new set** button.

To create a Set of volunteers based on when they are, or are not, scheduled to serve, select *Their schedule* from the *Include volunteers in this set based on* dropdown list.

The

*Their schedule*

rule determines whether to include volunteers in the Set based on the data stored on the Schedule tab in the volunteer record. While in many cases the dates volunteers are scheduled to serve will become dates on which they have [service entires \[pg:1581\]](#) recorded on the Service tab of their record--this is not always the case. For example, a volunteer may have been on the schedule on more than one date, but then unexpectedly was unable to serve on one (or more) of those dates. On the other hand, a volunteer may not have been on the schedule at all, but may have been called in last minute to serve in an emergency situation.

The *Their schedule* Set rule allows a [System Operator \[pg:0065\]](#) to find volunteers who are, or are not, on the schedule, regardless of whether or not they actually serve on those dates.

For example, the following illustration will make a Set that includes volunteers who are scheduled to serve on the specific date of January 2, 2015.

**Their schedule** Rule

They  are  are not

scheduled on January 2 2015

scheduled in Any month 2014

**And they are scheduled in** Any assignment

[Help](#) Remove this rule

Another option within this Set is to include volunteers who are scheduled to serve in a particular month and/or year. In the following example, volunteers will be included in the Set if they are on the schedule for the current month in the current year. (Using this Set in different months will pull different groups of volunteers.)

**Their schedule** Rule

They  are  are not

scheduled on January 2 2015

scheduled in The current month The current year

**And they are scheduled in** Any assignment

[Help](#) Remove this rule

When you make your Set to find volunteers who *are* scheduled, you can also limit the search to find only volunteers who are scheduled in a particular **Site, Place or Assignment** [pg:0096]. To do this, make your selection for the time frame you want to search, check the box beside *And they are scheduled in*, and select the Site, Place or Assignment from the dropdown list.

In the example below, volunteers will be included in the Set if they are scheduled in the *Orientation* Assignment anytime during January 2015.

**Their schedule** Rule

They  are  are not

scheduled on January 2 2015

scheduled in January 2015

**And they are scheduled in** Orientation

[Help](#) Remove this rule

The *Their schedule* Set rule can also be used to include volunteers who *are not* scheduled on a particular date, or in a certain month and/or year.

The following rule will include volunteers who are *not* on the schedule for January 5, 2015.

**Their schedule** Rule

They  are  **are not**

scheduled on January 5 2015

scheduled in Any month 2014

**And they are scheduled in** Any assignment

[Help](#)

Finally, the following rule shows how to include volunteers who are *not* scheduled in *the coming month*. This will automatically be for the current year unless the Set is run in December. In this case, it will be for the following year. (Using this Set in different months will pull different groups of volunteers.)

**Their schedule** Rule

They  are  **are not**

scheduled on January 5 2015

scheduled in The coming month 2014

**And they are scheduled in** Any assignment

[Help](#)

---

## Their Checklist Dates Set Rule

Help topic 1145

Added or revised 02-14-2012

---

This help topic explains how to define a [Set rule \[pg:0853\]](#) based on the [Checklist \[pg:0142\]](#) dates recorded in the Dates box on the History tab in the volunteer record.

You create Set rules on the Set Definition page. If you're not already on the Set Definition page you can get there by choosing Sets from the [menu \[pg:0215\]](#), and then clicking the **Create a new set** button.

To create a Set of volunteers based on a Checklist date, select 'Their checklist dates' from the "Include volunteers in this set based on" drop down list.

This Set rule can identify volunteers who do or do not have a date for a particular Checklist item recorded on their History tab.

They have a -- checklist date that is...

When this type of Set rule is looking for volunteers who do have a Checklist date for a particular Checklist item tracked in Volgistics, system operators can look for volunteers who have that kind of Checklist date:

- (a) At all, by selecting the 'Any date' option;
- (b) In a particular month or period of time, by selecting the 'In' option;

- (c) Exactly, Anytime before, or Anytime after a certain date;
- (d) Anytime between specific dates, or
- (e) More than (--) days ago, as of the date the Set is used.

For example, a rule seeking to include volunteers who have a 'Background Check' Checklist date that is any time between January 1, 2009 and December 31, 2009 would be setup like this:

The screenshot shows a configuration window titled "Rule" for the condition "Their checklist date". The main configuration is as follows:

- They have a **Background check** checklist date that is...
  - Any date
  - In **Any month** **Any year**
  - Exactly **January** **1** **2009**
  - Anytime between **January** **1** **2009** and **December** **31** **2009**
  - More than **1** day(s) ago
- and  Only if the Notation for the date is **Complete**
- and  Only if Spare dropdown is **Two**
- and  Only if Spare checkbox is
  - Checked
  - Not checked
- and  Only if Spare text is **Dans**
- They do not have any **Initial interview** checklist dates

A "Help" link is located in the bottom right corner of the form.

Only if the Notation for the date is

In addition, operators can include only those volunteers who have the Checklist date with a specific Notation. To create a Set that includes only volunteers who have a Checklist date with a particular notation, check this checkbox and then choose the Notation from the drop-down list.

Only if (Spare drop-down) is

If you customized the spare drop-down field for your Date records, you can specify that volunteers must also have a specific Spare-down value to be included in this Set by checking this checkbox and choosing the appropriate value from the drop-down.

Only if (Spare checkbox) is

If you customized the spare checkbox field for your Date records, you can specify that volunteers must also have a specific Spare-checkbox value to be included in this Set by checking this checkbox and then choosing the appropriate value (checked or not checked).

### Only if (Spare text) is

If you customized the spare text field for your Date records, you can further specify that volunteers must also have a specific Spare text field value to be included in this Set by checking this checkbox and entering the text value. To be included in this Set, volunteers must have an entry in this field that exactly matches whatever you enter here (except that the comparison is not case sensitive, so 'YES' would be the same as 'yes' for example).

### They do not have any -- checklist dates

Again, this rule can also find volunteers who do not have any Checklist dates at all, or any Checklist dates for a particular checklist item. A Set rule that should include all volunteers without any 'Background check' Checklist dates would look like this:

---

## Their Photo Set Rule

Help topic 1177

Added or revised 10-30-2009

---

This help topic explains how to define a [Set rule \[pg:0853\]](#) based on whether or not a photo has been uploaded for a volunteer.

You create Set rules on the Set Definition page. If you're not already on the Set Definition page you can get there by choosing Sets from the [menu \[pg:0215\]](#), and then clicking the **Create a new set** button.

To create a Set of volunteers based on whether or not they have a photo in their volunteer record, select 'Their photo' from the "Include volunteers in this set based on" drop down list.

This Set rule can capture volunteers for whom a photo has or has not been uploaded.

The screenshot shows a configuration window for a Set Rule. The title bar reads "Their photo" on the left and "Rule" on the right. The main content area displays the text "Their photo" followed by a radio button selection. The "has" option is selected, and the "has not" option is unselected. The text "been uploaded" is positioned to the right of the radio buttons.

### has

Choose "has" to include volunteer records that currently include a photo.

### has not

---

## Find Volunteers with Invalid Text Numbers

Help topic 1296

Added or revised 06-05-2014

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You can use a Set to find the volunteers who have invalid text numbers based on the [Text Number Validity \[pg:0333\]](#) field.

To create such a Set:

1. Choose Sets from the [menu \[pg:0215\]](#).
2. Click the **Create a new set** button.
3. Under "What would you like to call this set?" enter a name for the set. For example 'Bad text numbers.'
4. Under "Include volunteers in this set based on" select "Their text number validity."
5. Click the **Go** button.
6. Configure the set rule as shown below.

The screenshot shows a configuration window titled "Their text number validity" with a "Rule" label in the top right corner. On the left, there are two radio button options: "is any of these..." (selected) and "is not any of these...". To the right, there is a list of seven criteria, each with a checkbox and a colored square: (undetermined) with a white square, (good - no recent failures) with a green square, (some failures) with a yellow square, (invalid mobile phone number) with a red square and checked checkbox, (Not opted-in to text messaging) with a red square and checked checkbox, (The 'No text message' checkbox is checked) with a red square and checked checkbox, and (They opted out by sending "STOP") with a red square and checked checkbox. At the bottom right, there is a "Help" link and a "Remove this rule" button.

7. Click the **Finished** button.

---

## Their Text Message Set Rule

Help topic 1297

Added or revised 07-18-2014

---

This help topic explains how to define a [Set rule \[pg:0853\]](#) based on the information recorded in the *Text* field on the [Core tab \[pg:1868\]](#) of the volunteer record. In order to have a number recorded in this field, a volunteer must [opt-in \[pg:0323\]](#) to [text messaging \[pg:0352\]](#).

The Set rule can also find volunteers based on their [text message preferences \[pg:0381\]](#), or include volunteers who do (or do not) have the *No text message* box checked on the Core tab.

You create Set rules on the Set Definition page. If you're not already on the Set Definition page, you can get there by choosing Sets from the [menu \[pg:0215\]](#), and then clicking the **Create a new set** button.

To create a Set of volunteers based on their

*Text*

field, select

*Their text messages*

from the

*Include volunteers in this set based on* dropdown list. *This option will not appear in the dropdown list unless you have [enabled text messaging \[pg:0321\]](#) in your account.*

To include volunteers who have a number recorded in the *Text* field, define the Set rule like this:

The screenshot shows a configuration panel titled "Their text messages" with a "Rule" label in the top right. It contains three radio button options:

- They  have  do not have a text message mobile phone number recorded
- They  want to receive  do not want to receive  text messages
- 'No text message'  is checked  is not checked

At the bottom right, there are links for "Help" and a button labeled "Remove this rule".

The screenshot shows a contact form with the following fields and options:

- Work: (555) 777-9311  Ok to call
- Cell: (555) 867-5309  Ok to call
- Text: (555) 867-5309
- Fax: (800) 649-2568  Ok to call

Two red arrows point to the "Text" and "Cell" input fields.

To capture volunteers who have indicated a [message preference \[pg:1327\]](#) to receive a certain [type of message \[pg:1321\]](#) by text (or a text alert that an email was sent), use the second option in this Set rule. In the example below, the Set will find volunteers who have *Text Message* or *Email with Text Notification* selected for the *Recruitment appeals* message type:

**Their text messages** Rule

They  have  do not have a text message mobile phone number recorded

They  want to receive  do not want to receive  text messages

'No text message'  is checked  is not checked

[Help](#)

You can also use the second option to find volunteers who do not want to receive a certain type of message by text. In the example below, the Set will include volunteers who have *Email* or *None* selected for their preferences for *Schedule reminder* [pg:0791] messages:

**Their text messages** Rule

They  have  do not have a text message mobile phone number recorded

They  want to receive  do not want to receive  text messages

'No text message'  is checked  is not checked

[Help](#)



**Their text messages**
Rule

They  have  do not have a text message mobile phone number recorded

They  want to receive  do not want to receive  text messages

'No text message'  is checked  is not checked

[Help](#)

---

**Their email**
Rule

They  have  do not have an email address recorded

They  want to receive  do not want to receive  email

'No email'  is checked  is not checked

[Help](#)

If the *No text message* box on the Core tab is checked for a volunteer, it means that the volunteer cannot be contacted via text message. If this field is checked, it means that the volunteer, or your organization, has specifically decided the volunteer should not have text messages sent to them. For example, if the volunteer has been dismissed from your organization, but you need to keep his or her record intact for reports.

The image below shows how to define a rule that will capture all volunteers for whom the *No text message* box is checked.

---

## Their Text Number Validity Set Rule

Help topic 1298

Added or revised 07-21-2014

---

This help topic explains how to define a [Set rule \[pg:0853\]](#) based on the validity of the information recorded in the Text field on the [Core tab \[pg:1868\]](#) of the volunteer record.

You create Set rules on the Set Definition page. If you're not already on the Set Definition page you can get there by choosing Sets from the [menu \[pg:0215\]](#), and then clicking the **Create a new set** button.

To create a Set of volunteers based on their text number validity, select "Their text number validity" from the "Include volunteers in this set based on" dropdown list.

*This option will not appear in the dropdown list unless you have [enabled text messaging \[pg:0321\]](#) in your account.*

This Set rule can capture volunteers whose text numbers have been classified as green (good), yellow (some failures), red (bad) and/or white (undetermined). Volgistics uses a [validity tracking feature \[pg:0333\]](#) to determine a number's validity.

You can mark as many of the validity classifications as you'd like.

is any of these...

If you choose the "is any of these..." option, the Set will include volunteers with any of the chosen text number validity icons. For example, you would choose to include volunteers with green, yellow or white text number validity icons like this:

**Their text number validity** Rule

Their text number validity  is any of these...  is not any of these...

- (undetermined)
- (good - no recent failures)
- (some failures)
- (invalid mobile phone number)
- (Not opted-in to text messaging)
- (The 'No text message' checkbox is checked)
- (They opted out by sending "STOP")

[Help](#)

is not any of these...

---

## Find the Volunteers Who Became Active in a Certain Year

Help topic 2048

Added or revised 12-12-2006

---

You can create a Set that includes all of the volunteers who became active in a specific calendar or fiscal year. This Set will include the volunteers who have a **start date** [pg:1890] date during the year you choose. By default, volunteers will have this date if their record was marked 'active' for the first time anytime during the year you choose.

To create a set that finds all of the volunteers who became active in a certain calendar year:

1. Choose Sets from the **menu** [pg:0215].
2. Click the **Create a new set** button.
3. Under "What would you like to call this set?" enter a name for the set. For example 'Volunteers who started in 2006.'
4. Under "Include volunteers in this set based on" select "Their start date."
5. Click the **Go** button.

**Their start date** Rule

Any date  
 In Any month   
 Exactly     
 Anytime between January    
and  
January    
 More than  day(s) ago  
 Not more than  day(s) ago  
 Blank

6. Configure the set rule as shown above. Choose the calendar year you're interested in from the year drop down list. The example shown finds all of the volunteers who have a start date in 2006.

7. Click the **Finished** button.

You can also create Sets that include volunteers who became active anytime between two dates you specify. For example, if you have a fiscal year that runs July 1st through the end of June, you can create a Set that finds the volunteers who have a start date during that period.

To create a set that finds all of the volunteers who became active anytime between two dates:

1. Choose Sets from the [menu \[pg:0215\]](#).
2. Click the **Create a new set** button.
3. Under "What would you like to call this set?" enter a name for the set. For example 'Volunteers who started in FY 2006.'
4. Under "Include volunteers in this set based on" select "Their start date."
5. Click the **Go** button.

**Their start date** Rule

Any date  
 In Any month 2006  
 Exactly January 1 2006  
 Anytime between July 1 2005  
and  
June 30 2006  
 More than 1 day(s) ago  
 Not more than 1 day(s) ago  
 Blank

6. Configure the set rule as shown above. Choose the starting and ending dates you're interested in, as shown. The Set rule in the example shown above finds all of the volunteers who have a start date between July 1, 2005 and June 30, 2006.

7. Click the **Finished** button.

#### Related help

[Help Topic 2049 \[pg:0843\]](#) - Find the volunteers who became inactive in a certain year

---

## Find the Volunteers Who Became Inactive in a Certain Year

Help topic 2049

Added or revised 12-12-2006

---

You can create a Set that includes all of the volunteers who first became inactive in a specific calendar year or fiscal. This set will include the volunteers who have a [stop date \[pg:1890\]](#) during the year you choose. Volunteers will have this date if their records was marked 'inactive' anytime during the year you choose, and they are still inactive.

To create a set that finds all of the volunteers who have a stop date in a certain calendar year:

1. Choose Sets from the menu.
2. Click the **Create a new set** button.
3. Under "What would you like to call this set?" enter a name for the set. For example 'Volunteers who stopped in 2006.'
4. Under "Include volunteers in this set based on" select "Their stop date."
5. Click the **Go** button.

**Their stop date** Rule

Any date  
 In Any month  2006   
 Exactly   2006   
 Anytime between January  1  2006   
and  
January  1  2006   
 More than  day(s) ago  
 Not more than  day(s) ago  
 Blank

6. Configure the set rule as shown above. Choose the calendar year you're interested in from the year drop down list. The example shown finds all of the volunteers with a stop date in 2006.

7. Click the **Finished** button.

You can also create Sets that include volunteers who became inactive anytime between two dates you specify. For example, if you have a fiscal year that runs July 1st through the end of June, you can create a Set that finds the volunteers who became inactive during that period.

To create a set that finds all of the volunteers who have a stop date between any two dates:

1. Choose Sets from the menu.
2. Click the **Create a new set** button.
3. Under "What would you like to call this set?" enter a name for the set. For example 'Volunteers who stopped in FY 2006.'
4. Under "Include volunteers in this set based on" select "Their stop date."
5. Click the **Go** button.

**Their stop date** Rule

Any date  
 In Any month 2006  
 Exactly January 1 2006  
 Anytime between July 1 2005  
and  
June 30 2006  
 More than 1 day(s) ago  
 Not more than 1 day(s) ago  
 Blank

6. Configure the set rule as shown above. Choose the starting and ending dates you're interested in, as shown. In example shown above finds all of the volunteers who have a stop date anytime between July 1, 2005 and June 30, 2006.

7. Click the **Finished** button.

#### Related help

[Help Topic 2048 \[pg:0841\]](#) - Find the volunteers who became active in a certain year

---

## Find the Volunteers Who Served Hours in a Certain Year

Help topic 2050

Added or revised 09-22-2006

---

If you record volunteer hours, you can create a Set that includes all of the volunteers who served any number of hours anytime during a certain fiscal or calendar year. These would be the volunteers who were active during the year.

To create a set that finds all of the volunteers who performed at least some hours of service in a certain calendar year:

1. Choose Sets from the menu.
2. Click the **Create a new set** button.
3. Under "What would you like to call this set?" enter a name for the set. For example 'Volunteers who served in 2006.'
4. Under "Include volunteers in this set based on" select "Their service."
5. Click the **Go** button.

**Their Service**
Rule

They have...

At least  hours in

At least  hours between  
 the beginning of   and the end of

At least  Life hours

They do not have any  recorded

Only count service in

[Help](#)

6. Configure the set rule as shown above. In the example shown above, the Set has been configured to find volunteers who have at least 0:01 hours (one minute) of service recorded anytime between the beginning of January 2006, and December 2006. Choose the range of dates you want to consider. For example, if you want to find volunteers who served any hours between July 1, 2005 and June 30, 2005, select July 2005 and June 2006 as your date range.

Since the Set is configured to find volunteers who have at least one minute of service recorded during the date range you specify, volunteers with any number of hours during this period are included.

---

## How can I find active volunteers who have not served recently?

Help topic 2054

Added or revised 12-05-2011

---

A common task you may like to perform is looking for volunteers whose status is 'active,' for whom no recent volunteer service has been recorded. You can create a [Set \[pg:0858\]](#) that shows you exactly who these volunteer are.

To create a set that finds all of the volunteers whose status is 'active,' but who have no recent service recorded:

1. Choose Sets from the menu.
2. Click the **Create a new set** button.
3. Under "What would you like to call this set?" enter a name for the set. For example 'Follow-up Needed.'
4. Under "Include volunteers in this set based on" select "Their current status."
5. Click the **Go** button.

**Their current Status** Rule

Their Status is currently any of these:  Active  
 Applicant  
 Inactive  
 Prospect

[Help](#)

6. Configure the set rule as shown above.
7. Under "Add another rule based on..." select 'Their Service.'
8. Click the **Go** button.

**Their Service** Rule

They have...

Exactly  hours in

At least  hours between  
the beginning of   and the end of

At least  Life hours

They do not have any  recorded

They have any  recorded on

Only count service in

[Help](#)

9. Configure the second set rule as shown above. Your finished Set should look like this:



**Define a new set**

What would you like to call this set?

Which Volgistics operators should be able to use this Set?  
 Only those at headquarters  
 Operators at any Site

**Include volunteers in this set if...**

**Their current Status** Rule

Their Status is currently any of these:  Active  
 Applicant  
 Inactive  
 Prospect

[Help](#)

**Their Service** Rule

They have...

Exactly  hours in  2007

At least  hours between the beginning of  2007 and the end of  2007

At least  Life hours

They do not have any hours recorded

They have any hours recorded on  30 2007

Only count service in

[Help](#)

**This set has 2 rules...**

Include volunteers in this Set only if they pass **every one** of these rules  
 Include volunteers in this Set if they pass **any single one** of these rules

Add another rule based on...

If you want this set to have an additional rule, select the kind of rule you want to add and then click the Go button.

Click the **Finished** button if you are finished defining this set

[Help](#)

10. Click the Finished button.

Your Set is now ready to use. You can use this set to [view this set of volunteers \[pg:0861\]](#), or to [print a report that includes only this set \[pg:0863\]](#).

Hint: if you want to make these volunteers inactive in a single step, you can [tag the volunteers in this set \[pg:1544\]](#), choose Tags from the menu, select "Inactive" from the "Change the Status of all tagged volunteer records to:" drop down list, and then click the **Go** button.

---

## Find the Volunteers who are Active without an Assignment

Help topic 2057

Added or revised 02-03-2008

---

You can create a [Set \[pg:0858\]](#) that includes all of the volunteers whose [Status \[pg:1832\]](#) is currently "Active" but who do not have any assignments (specifically: those who do not have any assignment records entered on the Assignments box in their Service tab).

To create this Set:

1. Choose Sets from the [menu \[pg:0215\]](#).
2. Click the **Create a new set** button.
3. Under "What would you like to call this set?" enter a name for the set, such as "No assignment."
4. Under "Include volunteers in this set based on" select "Their current status" and then click the **Go** button.
5. For "Their Status is currently any of these," check "Active."
6. Under "Add another rule based on..." choose "Their assignment" and then click the **Go** button.
7. Select "They do not have any assignment," as shown below, for the "Their Assignment" rule.

### Define a new set

What would you like to call this set?

**Include volunteers in this set if...**

**Their current Status** Rule

Their Status is currently any of these:  Active  
 Applicant  
 Inactive  
 Prospect

[Help](#)

**Their Assignment** Rule

They  are assigned to   are not

Assigned  Trainee  
 Former's  
 Substitute

And their assignment "From" date is

And their assignment "To" date is

They do not have any assignment

[Help](#)

**This set has 2 rules...**

Include volunteers in this Set only if they pass **every one** of these rules  
 Include volunteers in this Set if they pass **any single one** of these rules

Add another rule based on...

If you want this set to have an additional rule, select the kind of rule you want to add and then click the Go button.

Click the **Finished** button if you are finished defining this set

[Help](#)

8. Click the **Finished** button to save your new Set.

## Related help

---

# Find the Volunteers who Don't Have an Email Address in their Record

Help topic 2063

Added or revised 02-22-2007

---

You can create a [Set \[pg:0858\]](#) that will include volunteers who do not have an email address like this:

1. Choose Sets from the [menu \[pg:0215\]](#).
2. Click the **Create a new set** button.
3. Under "What would you like to call this set?" enter a name for the set. For example 'Missing email address.'
4. Under "Include volunteers in this set based on" select "Their email."
5. Click the **Go** button.
6. Configure the set rule to "They do not have an email address recorded," and shown here:

The screenshot shows a configuration window titled "Rule" with a light blue background. The main heading is "Their email". There are three radio button options for the rule type:

- They  have  do not have an email address recorded
- They  want to receive  do not want to receive  email
- 'No email'  is checked  is not checked

7. Click the **Finished** button.

Your new Set will include all volunteer records that do have any entry in the Email address field on the [Core tab \[pg:1868\]](#).

You can now view or print this Set of volunteers.

## Related help

[Help Topic 2183 \[pg:0861\]](#) - How to view the volunteers in a Set

---

## Find Volunteers with Invalid Email Addresses

Help topic 2067

Added or revised 10-04-2016

---

You can use a Set to find the volunteers who have invalid email addresses, based on the [Email address validity field \[pg:0377\]](#).

To create such a Set:

1. Choose Sets from the [menu \[pg:0215\]](#).
2. Click the **Create a new set** button.
3. Under "What would you like to call this set?" enter a name for the set. For example, "Bad email addresses."
4. Under "Include volunteers in this set based on" select "Their email validity."
5. Click the **Go** button.
6. Configure the set rule as shown below.

**Their email validity** Rule

Their email address validity  is any of these...  is not any of these...

<input type="checkbox"/>	<input type="checkbox"/>	(undetermined)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	(good)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	(some failures)
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	(invalid email address)
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	(recipient opted-out)
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	('No email' is checked)

[Help](#)

7. Click the **Finished** button.

---

## Find the Volunteers Who Served on a Particular Date

Help topic 2069

Added or revised 10-26-2007

---

You can always view the schedule to see who was scheduled on any particular date in the past; however, not all scheduled volunteers necessarily served, and volunteers may have served on a date even though they were not scheduled to do so.

If you use VicTouch or you collect or post individual service records for each day a volunteer serves, you can see which volunteers actually have service recorded on a particular date. This is a useful query in situations where you need to find 'everyone who was here on this date...'

You can perform this kind of a query using a [Set \[pg:0858\]](#).

To create a set that finds all of the volunteers who served on a specific date:

1. Choose Sets from the [menu \[pg:0215\]](#).
2. Click the **Create a new set** button.
3. Under "What would you like to call this set?" enter a name for the set. For example 'Volunteers who served on...'
4. Under "Include volunteers in this set based on" select "Their service."
5. Click the **Go** button.

**Their Service** Rule

They have...

At least 0:00 hours in The current month 2007

At least 0:00 hours between the beginning of January 2007 and the end of December 2007

At least 0:00 Life hours

They do not have any hours recorded

They have any hours recorded on June 25 2007

Only count service in Central City

[Help](#)

6. Configure the set rule as shown above. Choose the date for which you want to find volunteers who had service. The example shown finds all of the volunteers who served on June 25, 2007.

7. Click the **Finished** button.

You can now use this Set to view or print the list of volunteers who served on the selected date. [Help topic 2183 \[pg:0861\]](#) explains how to view the volunteers in a Set. [Help topic 2184 \[pg:0863\]](#) explains how to print this list.

---

## Set Rules

Help topic 2177

Added or revised 09-22-2014

---

You can use the Volgistics [Sets \[pg:0858\]](#) feature to define custom volunteer groupings, such as "everyone with more than 100 hours" or "all junior volunteers who served last year."

Sets are made up of one or more *rules*. Volgistics uses a Set's *rules* to determine which volunteers to include in the Set. For instance: you can create a Set rule that says...

"Only include volunteers in this Set if their birthday is in September"

With such a rule, your Set would include just volunteers who have September birthdays.

Set rules are based on specific [fields \[pg:0940\]](#) of information in the database, and the values they contain. In the "September birthday" example, the rule is based on information in the [Date of birth \[pg:1861\]](#) field.

(As a side note, the Volgistics "Date of birth" field does allow you to enter a month and day of birth without a year value. This is useful to organizations that want to track birthdays, but that don't ask volunteers to give their year of birth.)

You can base a Set's rules on any of these kinds of information:

Query (or Search) Item	Help Topic Number
Address Label Reports	714
age	132
Archived Date	069
Assignment	196
Assignment Cluster	143
Availability	878
award Dates	134
award Eligibility	095
irthday	178
Characteristics	208
Checkbox - Spare	188
hecklist	095
hecklist Dates	145
City	130
Class Dates	135
Country	879
urrent Status	179
Daily Availability	878

Date of Birth (Age)	132
Date of Birth (Birthday)	178
Date of Last Activity	098
Date(s)	136
ate(s) - Archived	069
ate(s) - Award	134
ate(s) - Checklist	145
Date(s) - Class	135
Date(s) - Date of Last Activity	098
Date(s) - Dates	136
Date(s) - Entered	139
Date(s) - Mail	137
ate(s) - Start	140
ate(s) - Status	133
ate(s) - Stop	141
Dropdown - Spare	187
Email	128
Email Preferences	128
Email Validity	129
Entered Date	139
Fields - Spare	201
lags	198
Group Records	877
Individual Records	877
ind	877
Mail Dates	137
Mandatory Service	138
Message Preferences	128 and 1297
No Email	128
No Postal Mail	714
No Text Message	297
ast Status	189
hoto	177
Postal Code/Zip	131
Province/State	096

ole(s) - Assignment	196
ole(s) - Assignment Cluster	143
chedule	144
ervice	200
Service - Date of Last Activity	098
Service - Hours	200
ervice - Mandatory	138
ervice - Years of	142
ite	197
Spare Checkbox	188
Spare Dropdown	187
Spare Fields	201
tart Date	140
State/Province	096
tatus - Current	179
tatus - Dates	133
tatus - Past	189
top Date	141
ext Message Opt-in	297
Text Message Validity	298
ype	199
Years of Service	142
Zip/Postal Code	131

You choose a Set's rules on the Set Definition page when you [create or edit a Set \[pg:0859\]](#).

---

## Their Birthday Set Rule

Help topic 2178

Added or revised 06-14-2011

---

This help topic explains how to define a [set rule \[pg:0853\]](#) based on when a volunteer's birthday is.

You create Set rules on the Set Definition page. If you're not already on the Set Definition page you can get there by choosing Sets from the [menu \[pg:0215\]](#), and then clicking the **Create a new set** button.

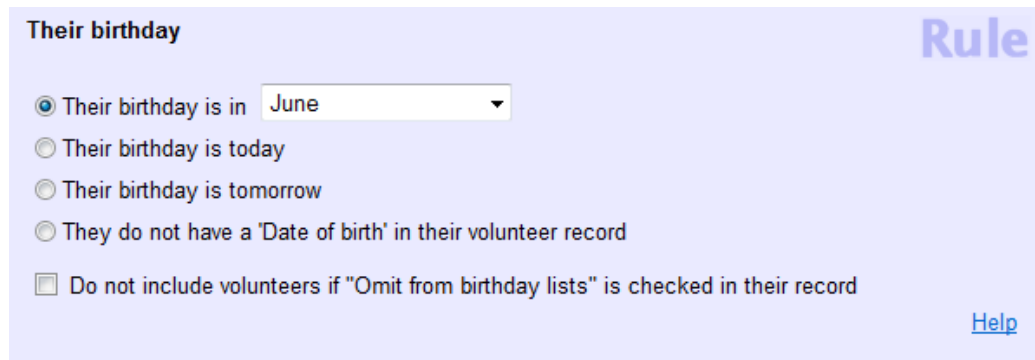
To create a Set of volunteers based on when the volunteer's birthday is, select 'Their birthday' from the "Include volunteers in this set based on" drop down list.



This rule uses information from the volunteer's 'Date of birth' field. The 'Date of birth' field is located on the Profile tab for each volunteer. Volunteer must have at least a day and month of birth entered in the 'Date of birth' field in order for them to be included in Sets based on their day or month of birth.

### Their birthday is in (month)

Choose this option if you want the set to include volunteers who have a birthday in the month specified. For example, if you want to find all of the volunteers who have a birthday in June, select this option and choose "June" as shown here:



**Their birthday** **Rule**

Their birthday is in

Their birthday is today

Their birthday is tomorrow

They do not have a 'Date of birth' in their volunteer record

Do not include volunteers if "Omit from birthday lists" is checked in their record

[Help](#)

You can also select:

- Any month

Choosing 'any month' will find volunteers with a birthday in any month of the year. This selection is useful for finding volunteers who have at least a day and month entered in the 'Date of birth' field.

- The current month

Choosing 'The current month' will find the volunteers who have a birthday in whatever month it is when you use this set. This selection is useful for creating a Set you can use each month to generate a birthday list for people who have a birthday in the current month.

- The coming month

Choosing 'The coming month' will find the volunteers who have a birthday in whatever month follows the current month at the time you use the set. This selection is useful for creating a Set you can use each month to generate a birthday list for people who have a birthday in the following month.

- The previous month

Choosing 'The previous month' will find the volunteers who have a birthday in whatever month preceded the current month at the time you use the set.

### Their birthday is today

Choose this option to include all of the volunteers whose birthday is today. If you use the Set on a later date it will include all of the volunteers whose birthday is on that date.

### Their birthday is tomorrow

Chose this option to include all of the volunteers whose birthday is tomorrow. If you use this Set on a later date it will include all of the volunteers whose birthday is the on the following day.

They do not have a 'Date of birth' in their volunteer record

Select this option to include all of the volunteers who do not have any entry in the 'Date of birth' field. The Date of birth appears on the Profile tab for each volunteer, unless it has been hidden by your organization.

Use this selection if you want to be sure you have a date of birth entered for all volunteers.

Do not include volunteers if "Omit from birthday lists" is checked in their record

---

## Their Current Status Set Rule

Help topic 2179

Added or revised 03-20-2008

---

This help topic explains how to define a [Set rule \[pg:0853\]](#) based on what a volunteer's [Status \[pg:1832\]](#) is currently. Volunteer Status is tracked on the Core tab in the volunteer record.

You create Set rules on the Set Definition page. If you're not already on the Set Definition page you can get there by choosing Sets from the [menu \[pg:0215\]](#), and then clicking the **Create a new set** button.

To create a Set of volunteers based on volunteer Status, select 'Their current status' from the "Include volunteers in this set based on" drop down list.

Their Status is currently any of these

Check the volunteer Status(es) you want to include in this Set. You must check at least one volunteer Status.

For example, to create a Set that includes only 'Active' volunteers you would create a rule like the one shown here:

Their current Status Rule

Their Status is currently any of these:  Active  
 Applicant  
 Inactive  
 Prospect

[Help](#)

If you select more than one Status, your Set will include volunteers that have any of the checked statuses. For example, to create a Set that finds volunteers whose Status is currently either 'Active,' or 'Applicant,' you would create a rule like the one shown here:

## Their current Status

## Rule

Their Status is currently any of these:

- Active
- Applicant
- Inactive
- Prospect

[Help](#)

---

## Sets

Help topic 2180

Added or revised 04-19-2017

---

A Set is a Volgistics tool you use to define custom volunteer groupings. You can use Sets to print reports that include just the volunteers in the set, or to send messages (such as email or text) to all of the volunteers in a set.

These are some examples of Sets:

- Those who started volunteering in a certain month or year
- Volunteers who are active and have a birthday next month
- Volunteers with more than a certain number of hours in a specific assignment during the last year.

You may create as many different Sets as you need.

Once you define a Set of volunteers you can use the set again later, and as often as you want. For example, if you create a Set that includes volunteers whose birthday is next month, you can use that set each month to print a list of the volunteers who have their birthday in the coming month.

Here are some help topics with more information on the Sets feature:

[How to define a set \[pg:0859\]](#)

[How to view the volunteers in a Set \[pg:0861\]](#)

[How to print a report for a set \[pg:0863\]](#)

[Send messages to the volunteers in a Set \[pg:0396\]](#)

[Using Tags with Sets \[pg:1544\]](#)

### Examples of Set definitions:

These Help Topics show you how to create Sets which include volunteers who meet a variety of specific conditions.

[Help Topic 2049 \[pg:0843\]](#) - Find the volunteers who became inactive in a certain year

[Help Topic 2048 \[pg:0841\]](#) - Find the volunteers who became active in a certain year

- [Help Topic 2069 \[pg:0851\]](#) - Find the volunteers who served on a particular date  
[Help Topic 2050 \[pg:0845\]](#) - Find the volunteers who served hours in a certain year  
[Help Topic 2222 \[pg:0878\]](#) - Find the volunteers with no recent activity  
[Help Topic 2057 \[pg:0848\]](#) - Find the volunteers who are Active without an assignment

---

## How to Create a Set

Help topic 2181

Added or revised 09-30-2016

---

[Sets \[pg:0858\]](#) are made up of 'rules.' A Set's rules specify which volunteers are in the set. For example: if you want a set that includes all of the volunteers who have at least 1,000 hours recorded in their record. The rule for this set would be "volunteers who have 1,000 or more "Life Hours."

Sets can have multiple rules. A Set with the rules shown below would create a set of volunteers who have over 1,000 hours, are currently active, and are 'adult' volunteers:

More than 1000 life hours, and  
Status is currently 'active,' and  
Type is 'Adult'

To define a new Set:

1. Choose Sets from the [menu \[pg:0215\]](#). If you don't have a Sets option on the [menu \[pg:0215\]](#), your operator rights prevent you from creating new Sets (however you may still be able to use Sets that others have created).
2. If you don't see the Set you want on the list of existing Sets, click the **Create a new set** button. This opens the 'Set Definition' window shown here:

**Define a new set**

What would you like to call this set?

Enter any name that describes this set of volunteers  
(e.g. 'Over 65' or 'Available weekends')

Include volunteers in this set based on

Select what it is the volunteers in this set will all  
have in common and then click the Go button.

[Help](#)

3. Under "What would you like to call this set?" enter a name for the new Set. The Set name may be anything you'd like, as long as you choose a name that is not already used for another Set.

Choose a name that helps you remember which volunteers are in the Set. For example, if your set will include 'corporate volunteers who served in 2005,' you might name the Set "2005 Corporate Volunteers."

4. If you use the [Site Level Access \[pg:0092\]](#) feature, and you are a headquarters level operator, Volgistics will ask "Which Volgistics operators should be able to use this Set?"

Select "Only those at headquarters" if you do not want site level operators to use the Set. Select "Users at all sites" if you would like site level operators to be able to use this Set.

If you select "Users at all sites," site level operators may use this Set, however they may not make changes to its definition. In addition, when site level operators use this Set they will see just the volunteers from their own site who are in the Set. For example, a Set you define to include all volunteers with more than 1,000 Life hours would only include volunteers with more than 1,000 Life hours at site 'XYZ' when the Set is used by an 'XYZ' site operator.

5. Under "Include volunteers in this set based on" choose the kind of rule you want your set to use. If your Set will have more than one rule, start by choosing the first rule.

6. Click the **Go** button.

7. Define your first rule. For help creating rules, click the Help link in the Rule box, or visit the [Rules \[pg:0853\]](#) help topic.

8. If your Set will include just one rule, click the **Finished** button once you've finished defining the rule. If your Set will include multiple rules, choose the next rule under "Add another rule based on..."

Once you are finished defining the rule(s) for your set you can start using it. These help topics include more information about using Sets:

[Testing a new Set \[pg:0861\]](#)

[How to view the volunteers in a Set \[pg:0861\]](#)

[How to print a report for a Set \[pg:0863\]](#)

[Send messages to the volunteers in a Set \[pg:0396\]](#)

[Using Tags with Sets \[pg:1544\]](#)

#### Examples of Set definitions:

These Help Topics show you how to create Sets which include volunteers who meet a variety of specific conditions.

[Help Topic 2049 \[pg:0843\]](#) - Find the volunteers who became inactive in a certain year

[Help Topic 2048 \[pg:0841\]](#) - Find the volunteers who became active in a certain year

[Help Topic 2069 \[pg:0851\]](#) - Find the volunteers who served on a particular date

[Help Topic 2050 \[pg:0845\]](#) - Find the volunteers who served hours in a certain year

[Help Topic 2222 \[pg:0878\]](#) - Find the volunteers with no recent activity

[Help Topic 2057 \[pg:0848\]](#) - Find the volunteers who are Active without an assignment

---

## Testing a New Set

Help topic 2182

Added or revised 09-30-2016

---

If you've just [defined a new Set \[pg:0859\]](#) - or changed an existing one - it's a good idea to test your [Set \[pg:0858\]](#) to be sure it includes the volunteers you expect. To test a Set:

1. Choose Volunteers from the [menu \[pg:0215\]](#).
2. Under the "Include" section, use the "Sets" dropdown list to select the Set you want to test.
3. Click the 'All' link near the top of the Volunteers page to display a list of all of the volunteers in the Set.

This list should include all of the volunteers you expect to see in the Set, and none that you don't. If necessary you can 'spot-check' as many of the volunteers as you'd like to be sure they meet the rules you've defined for the Set. For example, if your set should include volunteers who have at least 1,000 life hours, and who are 'Adult' volunteers; you would examine the Core tab to spot-check a record. The volunteer's Core tab should show at least 1,000 life hours in the Statistics box, and 'Adult' in the 'Type' field.

When you're finished testing, clear your Include settings like this:

1. Choose Volunteers from the [menu \[pg:0215\]](#).
2. Under the "Include" section click the "Clear" link.

If you discover that your Set includes volunteers you didn't want to include, or is missing volunteers you did want to include, return to Sets and modify your rules as needed. To modify a Set definition:

1. Choose Sets from the [menu \[pg:0215\]](#).
2. Click on the name of the Set you want to modify.
3. Make any changes you'd like to the Set's rules.
4. Click the **Finished** button when you're finished.

---

## How to View the Volunteers in a Set

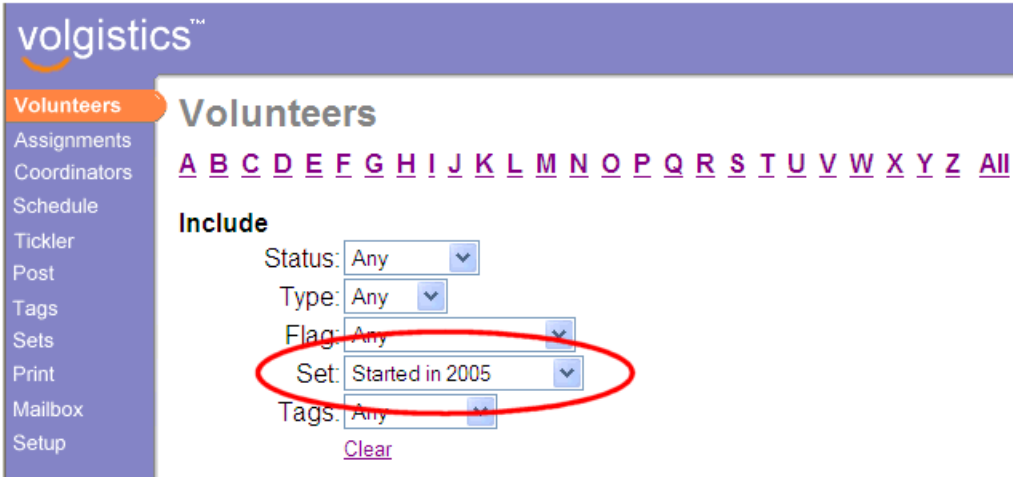
Help topic 2183

Added or revised 09-30-2016

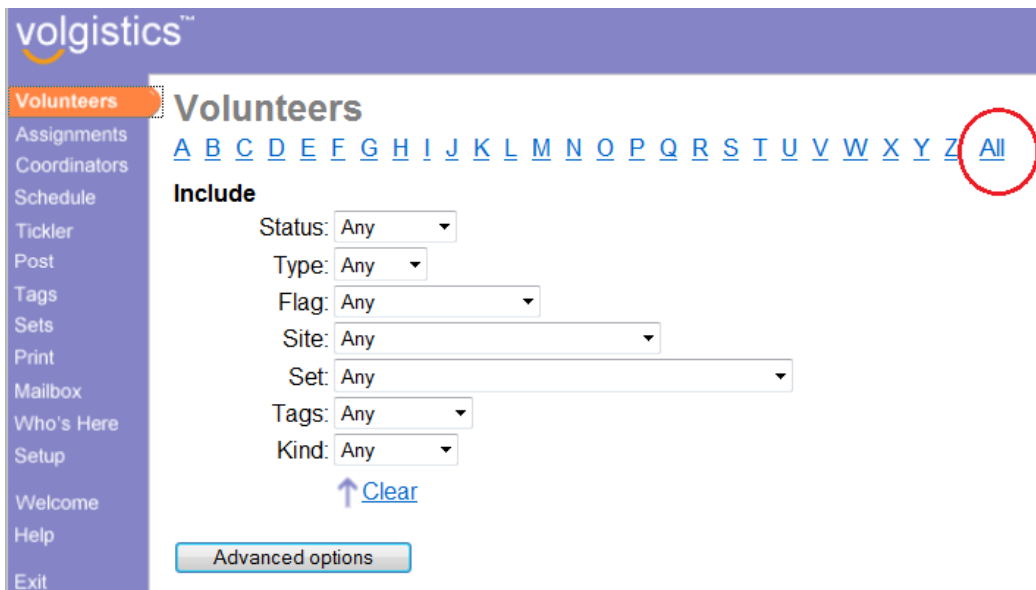
---

You can view a list of the volunteers in a [Set \[pg:0858\]](#) on the Volunteers page.

1. Choose Volunteers from the [menu \[pg:0215\]](#)
2. Under the "Include" section, select the Set you want to view from the "Sets" dropdown, as shown here:



3. Click the 'All' link near the top of the Volunteers page to display a list of all of the volunteers in the Set.



When you're finished viewing the volunteers in a Set you should clear the Include settings like this:

1. Choose Volunteers from the [menu \[pg:0215\]](#).
2. Under the "Include" section click the "Clear" link.

**Volgistics™**

**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

**Include**

Status: Active

Type: Any

Flag: Any

Site: Any

Set: Expired Texting & Driving

Tags: Any

Kind: Any

↑ Clear

Advanced options

**Related help** [Help topic 2182 \[pg:0861\]](#) - Testing a New Set  
[Help topic 2184 \[pg:0863\]](#) - How to Print a Report for a Set

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## How to Print a Report for a Set

Help topic 2184

Added or revised 09-30-2016

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You can use [Sets \[pg:0858\]](#) when you print reports if you want a report to include just the volunteers who are in a particular Set. For example, if you have a 'Junior volunteers' Set, you can print a report that includes just the Junior volunteers.

If you've already defined the Set you want to include on a report, you're all ready to start printing. If you haven't defined the Set yet, [create the Set \[pg:0859\]](#) first and then return here when you're finished.

To print a report that includes just the volunteers in a specific set:

1. Choose Print from the [menu \[pg:0215\]](#).
2. Select the report you want to print. You can use Sets with any volunteer report, including Address labels; Excel spread sheets; Labels; Name tags; Service details; Service summary; and Volunteer list reports.
3. Click the **Print it** button for the report you select.
4. On the Include page, check "These volunteers," as shown here:



**Include** Help Start printing Cancel

Which **volunteers** do you want to include in this report?

Tagged volunteers ( 0)

These volunteers:

Status

5. On the Include page, check "This set" and then use the drop-down list to choose the set you want the report to include, as shown here:

Set

This set: Junior volunteers ▼

Help Start printing Cancel

6. Click the **Start printing** button when you're ready to start printing the report.

You can use the "Include" window to further limit which volunteers will appear on the report by combining a Set with other selection criteria on the Include page. For example, if you have a 'Junior volunteers' Set, but you only want the report to include Junior volunteers who are currently 'active,' you would use the Include page to select the "Junior volunteers" Set and **also** choose to include only volunteers who are Active, as shown here:

**Include** Help Start printing Cancel

Which **volunteers** do you want to include in this report?

Tagged volunteers ( 0)

These volunteers:

**Status**

Any

Any of these

Active  Applicant  Inactive

Prospect

**Type**

Any

Any of these

Adult  Junior

**Flags**

Any

Any of these

All of these

Not any of these

Auxiliary  Regular  RSVP

Telephone Pioneer

**Set**

This set: Junior volunteers

Help Start printing Cancel

The report with the Include selections shown above will include just the Active Junior volunteers who are currently Active, because the Include page says to include just volunteers whose status is 'Active' and who are part of the 'Junior volunteers' Set. Whenever you choose multiple Include criteria like this, volunteers will appear on the report only if they meet **all** of the criteria you choose.

Here's another example:

**Include** Help Start printing Cancel

Which **volunteers** do you want to include in this report?

Tagged volunteers ( 0)

These volunteers:

**Status**

Any

Any of these

Active  Applicant  Inactive

Prospect

**Type**

Any

Any of these

Adult  Junior

**Flags**

Any

Any of these

All of these

Not any of these

Auxiliary  Regular  RSVP

Telephone Pioneer

**Set**

This set: No service ▼

Help Start printing Cancel

The report with the Include selections shown above will include just Active 'Adult' volunteers who have no service recorded, because

- Only the 'active' status is selected in the Status section
- Only 'Adult' volunteers are selected in the Type section
- A 'No service' Set is selected

Volunteers will appear on the report only if they have **all** three of these criteria.

#### Related help

[Help topic 2182 \[pg:0861\]](#) - Testing a New Set

[Help topic 2183 \[pg:0861\]](#) - How to View the Volunteers in a Set

[Help Topic 2206 \[pg:0464\]](#) - How do I make Set names print as part of report titles?

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## Their Spare Dropdown Fields Set Rule

Help topic 2187

Added or revised 12-20-2007

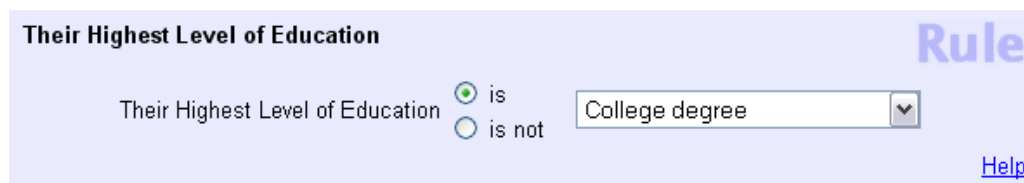
---

This help topic explains how to define a [Set rule \[pg:0853\]](#) based on any of the "Spare dropdown fields" that appear on the Profile tab.

You create set rules on the Set Definition page. If you're not already on the Set Definition page you can get there by choosing Sets from the [menu \[pg:0215\]](#), and then clicking the **Create a new set** button.

To create a set of volunteers based on any of the "spare dropdown fields," select the desired field from the 'Add a rule...' drop down list.

For example, an organization may have customized a spare dropdown field to track their volunteers' highest level of education. The following image depicts the rule setup for a Set of volunteers who have a college degree.



The image shows a screenshot of the 'Set Definition' page. The title is 'Their Highest Level of Education'. Below the title, there are two radio buttons: 'is' (selected) and 'is not'. To the right of these radio buttons is a dropdown menu with 'College degree' selected. In the top right corner, the word 'Rule' is displayed in a large, light blue font. In the bottom right corner, there is a blue 'Help' link.

Alternatively, there may be a need to exclude volunteers with a specific spare dropdown field entry. In the Education example, there might be a need to exclude all volunteers with the entry of "Did not complete high school." The image below shows how to define such a rule.

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## Their Spare Checkbox Fields Set Rule

Help topic 2188

Added or revised 03-20-2008

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This help topic explains how to define a [Set rule \[pg:0853\]](#) based on any of the "Spare checkbox fields" that appear on the Profile tab.

You create Set rules on the Set Definition page. If you're not already on the Set Definition page you can get there by choosing Sets from the [menu \[pg:0215\]](#), and then clicking the **Create a new set** button.

To create a Set of volunteers based on any of the "spare checkbox fields," select the desired field name from the "Include volunteers in this set based on" drop down list and make the appropriate selections in the Set rule definition box.

For example, an organization might have a spare checkbox field to track whether or not volunteers have any sort of criminal history. The following image shows how such an organization would define a Set rule to include only those volunteers whose 'Criminal Record' checkbox is not checked.

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## Their Past Status Set Rule

Help topic 2189

Added or revised 03-20-2008

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This help topic explains how to define a [Set rule \[pg:0853\]](#) based on what a volunteer's [Status \[pg:1832\]](#) was at some time in the past. This information is stored as Status dates recorded in the Dates box on the History tab in the volunteer record.

You create Set rules on the Set Definition page. If you're not already on the Set Definition page you can get there by choosing Sets from the [menu \[pg:0215\]](#), and then clicking the **Create a new set** button.

To create a Set of volunteers based on volunteers' past Status, select 'Their past status' from the "Include volunteers in this set based on" drop down list.

### Their Status was

Check the volunteer Status(es) you want to include in this Set. You must check at least one volunteer Status.

For example, to create a Set that includes only volunteers who had an 'Inactive' Status at some point in the past, you would create a rule like the one shown here:

**Their past Status** Rule

Active  
 Applicant  
 Inactive  
Their Status was  Prospect anytime during  Vacation  
 Sick  
 LOA

December 2007 through December 2007

[Help](#)

In this example, the Set would include all volunteers who had an 'Inactive' Status at any point in December 2007. The past Status Set rule can pick up volunteers who had a particular Status at some point during a time frame of multiple months by selecting different months and/or years from the drop down date fields.

If you select more than one Status, your Set will include volunteers that had any of the checked Statuses. For example, to create a Set that finds volunteers who had a Status of either 'Inactive' or 'LOA' during December 2007, you would create a rule like the one shown here:

**Their past Status** Rule

Active  
 Applicant  
 Inactive  
Their Status was  Prospect anytime during  Vacation  
 Sick  
 LOA

December 2007 through December 2007

[Help](#)

---

## Their Assignment Set Rule

Help topic 2196

Added or revised 03-31-17

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This help topic explains how to define a [Set rule \[pg:0853\]](#) based on whether or not a volunteer has a particular Assignment, or an Assignment at a specific Site or Place.

You create Set rules on the Set Definition page. If you're not already on the Set Definition page you can get there by choosing Sets from the [menu \[pg:0215\]](#), and then clicking the **Create a new set** button.

To create a Set of volunteers based on the volunteers' Assignments, select 'Their assignment' from the 'Add a rule...' drop down list.

When a Set has a rule based on volunteer Assignment, it looks at the Assignment box on the volunteer's Service tab to determine whether or not the volunteer has (or does not have) the assignment you specify. You can also (optionally) specify that the volunteer must have a particular [Role \[pg:0103\]](#) in the assignment; or a 'From date' or 'To date' in the assignment that falls in a particular time frame. Creating a rule that includes volunteers who have *no* assignment at all listed on their Service tab is also possible.

### They are (are not) assigned to

Choose this option if you want your set to include all of the volunteers assigned (or not assigned) to a specific Assignment, or any Assignment at a specific Site or Place.

Select 'are assigned' to include all of the volunteers who *are* assigned to a particular Assignment, Site, or Place. Select 'are not assigned' if you want to include only the volunteers who *do not* have a particular Assignment, or any Assignment at a particular Site or Place.

Use the drop down list to select the Assignment, Site, or Place.

### Examples

Here's an example of a rule that includes all of the volunteers who have an Assignment called 'Reading Buddy:'

The screenshot shows a configuration window titled "Their Assignment" with a "Rule" label in the top right corner. The interface includes the following elements:

- Radio buttons for "They  are assigned to" and "They  are not assigned to".
- A dropdown menu showing "Reading Buddy".
- Checkboxes for roles: "Assigned", "Former", "Substitute", "Trainee", "Inactive", "Referral", and "Preference".
- Fields for "And their assignment 'From' date is" and "And their assignment 'To' date is", each with a date picker and a calendar icon.
- A radio button for "They do not have any assignment".
- A "Help" link in the bottom right corner.

Since there's no Role; From date; or To date specified, this set includes all volunteers who have the 'Reading Buddy' Assignment listed in the 'Service' box on their Service tab regardless of what their Role is in that Assignment.

In the example below, the Rule calls for volunteers who have the 'Reading Buddy' Assignment, but only if their Role in the 'Reading Buddy' Assignment is either "Assigned" or "Substitute."

The screenshot shows a configuration window titled "Rule" with a sub-header "Their Assignment". It contains several sections:

- A radio button group with "They" selected, and sub-options "are" (selected) and "are not".
- A dropdown menu set to "Reading Buddy".
- A section "And their Role in the assignment is" with a list of roles: "Assigned" (checked), "Former", "Substitute" (checked), and "Trainee".
- A section "And their assignment 'From' date is" with a dropdown set to "Any date" and an empty date field.
- A section "And their assignment 'To' date is" with a dropdown set to "Any date" and an empty date field.
- A radio button option "They do not have any assignment".
- A "Help" link in the bottom right corner.

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## Their Site Set Rule

Help topic 2197

Added or revised 02-14-2012

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This help topic explains how to define a [Set rule \[pg:0853\]](#) based on which Sites a volunteer is associated with.

You create Set rules on the Set Definition page. If you're not already on the Set Definition page you can get there by choosing Sets from the [menu \[pg:0215\]](#), and then clicking the **Create a new set** button.

To create a Set of volunteers based on Site, select 'Their Site' from the "Include volunteers in this set based on" drop down list.

This Set rule appears only if you use the [Site Level Access \[pg:0092\]](#) feature, and it determines which volunteers should be included in the Set by looking at the Sites box on the volunteer Core tab.

Site Set rules can be based on whether volunteers do or not have a particular Site; whether they have no Site, or whether they have a minimum number of Sites.

### Their Site

The first option will capture all volunteers who have a specific Site recorded in the Sites box on their Core tab. Help topic 2037 describes [how a volunteer's record becomes associated with a particular Site or Sites \[pg:0094\]](#). In the example provided below, the Set will capture all volunteers who are associated with the South Site.

**Their Site** **Rule**

Their Site     
  is     
 South ▼

is not

They have no Site

They have 1 ▼ or more Sites

[Help](#)

By choosing the 'is not' radio button rather than the 'is' button, this Set could have included all volunteers whose records do not contain an association with the South Site.

The second group of volunteers that can be pulled into a Set with this type of Set rule are those volunteers without any Site at all. The Set rule to capture volunteers without a Site looks like this:

**Their Site** **Rule**

Their Site     
  is     
 Headquarters ▼

is not

They have no Site

They have 1 ▼ or more Sites

[Help](#)

It can sometimes be useful to view a Set of volunteers without a Site to determine which volunteers within the Set are actually in need of being assigned to a Site.

Finally, the 'Their Site' Set rule can be used to identify volunteers with a minimum number of Sites. This rule can include volunteers with *at least* any number of Sites (between one and twelve) recorded on their Core tab.

The following image shows a rule that would capture volunteers with at least any 2 Sites on their Core tab:

**Their Site** **Rule**

Their Site     
  is     
 Headquarters ▼

is not

They have no Site

They have 2 ▼ or more Sites

[Help](#)



---

## Their Flags Set Rule

Help topic 2198

Added or revised 03-20-2008

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This help topic explains how to define a [Set rule \[pg:0853\]](#) based on whether or not a volunteer has a specific Flag.

You create Set rules on the Set Definition page. If you're not already on the Set Definition page you can get there by choosing Sets from the [menu \[pg:0215\]](#), and then clicking the **Create a new set** button.

To create a Set of volunteers based on volunteer Flags, select 'Their flags' from the "Include volunteers in this set based on" drop down list.

The 'Their flags' Set rule includes volunteers in the Set based on the Flags listed on the Core tab in the volunteer record. This rule can include volunteers who have or do not have any of the Flags tracked by your organization.

Their Flags include any of these...

Choose this option to include volunteers who have any of the Flags you specify. In the example below, the rule would capture all volunteers who have 'Regular' and/or 'RSVP' Flags.

The screenshot shows a configuration window for a 'Rule'. On the left, under 'Their Flags', there is a dropdown menu with the text '(Choose up to 12)'. Below it are four checkboxes: 'Regular' (checked), 'Auxiliary' (unchecked), 'RSVP' (checked), and 'Telephone Pioneer' (unchecked). In the center, there are two radio button options: 'include any of these...' (selected) and 'do not include any of these...'. A 'Help' link is located in the bottom right corner of the window.

Their Flags do not include any of these...

Choose this option to include volunteers who do not have the Flags you have marked. In the image that follows, the rule would pick up all volunteers who do not have the 'Telephone Pioneer' Flag. In other words, volunteers with the 'Regular,' 'Auxiliary,' and 'RSVP' Flags would be included in a Set with this rule, along with volunteers without any Flags.

---

## Their Type Set Rule

Help topic 2199

Added or revised 03-20-08

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This help topic explains how to define a [Set rule \[pg:0853\]](#) based on whether or not a volunteer is a specific Type.

You create Set rules on the Set Definition page. If you're not already on the Set Definition page you can get there by choosing Sets from the [menu \[pg:0215\]](#), and then clicking the **Create a new set** button.

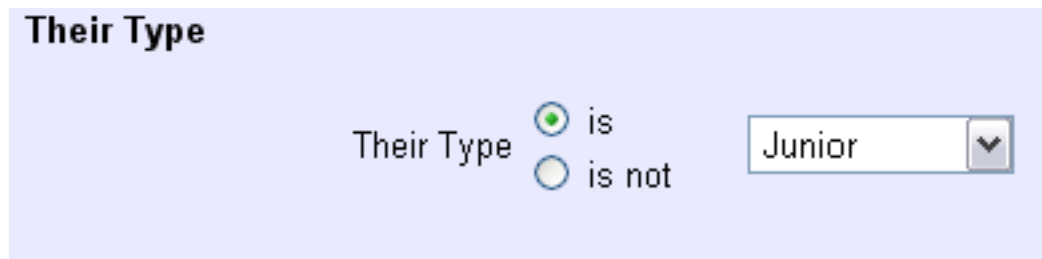
To create a Set of volunteers based on volunteer Type, select 'Their type' from the "Include volunteers in this set based on" drop down list.

The 'Their type' Set rule includes volunteers based on the data recorded in the [Type field \[pg:0212\]](#) on the Core tab in the volunteer record.

This Set rule can capture volunteers who are of a certain Type or are specifically not of a certain Type.

### Their Type

The following image shows a Set rule that would pick up all volunteers of the Type 'Junior.'



The image shows a configuration window for a Set rule titled "Their Type". It features two radio buttons: "is" (which is selected) and "is not". To the right of these buttons is a dropdown menu currently displaying "Junior".

This sort of Set rule is frequently used to create separate reports for volunteers of a different Type (for example, creating one report for 'Adult' volunteers and another for 'Junior' volunteers).

### Their type is not...

---

## Their Service Set Rule

Help topic 2200

Added or revised 11-06-12

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This help topic explains how to define a [Set rule \[pg:0853\]](#) based on each volunteer's service records (e.g. their hours or other measure of service). You create Sets on the Set Definition page. If you're not already on the Set Definition page you can get there by choosing Sets from the [menu \[pg:0215\]](#), and then clicking the **Create a new set** button. You can learn more about creating and using Sets in [Help topic 2181 \[pg:0859\]](#).

To create a Set of volunteers based on volunteer service, select "Their Service" from the "Include volunteers in this set based on" dropdown list. The "Their service" rule determines whether to include volunteers in the Set based on the data stored in their Service box on the [Service tab \[pg:1581\]](#) in the volunteer record.

There are eight main ways to define a Set rule by service.

1. The first option allows the System Operator to define a Set by the number of hours, [Merit Hours \[pg:1564\]](#), or other [Service Measure \[pg:1557\]](#) recorded in a particular month and/or year, or group of months. The following image shows how this Set rule would be setup to include volunteers with less than 40 hours of service recorded for March 2007.



The image shows a configuration window for a Set rule. It features a radio button (which is selected) and a dropdown menu set to "Fewer than". To the right of this is a text input field containing "40". Further right is another dropdown menu set to "hours", followed by the word "in", another dropdown menu set to "March", and finally a dropdown menu set to "2007".

2. Secondly, this type of Set rule allows a System Operator to base the Set on volunteers who have served: "At least," "Exactly," or "Fewer than" a specified number of hours (or other service) within a range of dates. In the following example, volunteers with at least 1 hour of service recorded between the beginning of January 2007 and the end of December 2007 would be included in the Set.



The screenshot shows a configuration interface for a Set rule. It features a radio button on the left, followed by a dropdown menu set to "At least", a text input field containing "1", another dropdown menu set to "hours", and the word "between". Below this, there are two date ranges: "the beginning of" followed by a dropdown for "January" and a year dropdown for "2007", and "and the end of" followed by a dropdown for "December" and a year dropdown for "2007".

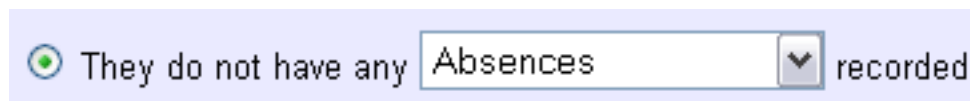
3. The "Their service" Set rule's third option lets the System Operator include volunteers based on their hours (or other service) over their Life, YTD (Year-to-date), MTD (Month-to-date), or a floating subtotal date range. The [Statistics \[pg:1387\]](#) help topic shows how you define Life, YTD, MTD and floating subtotal ranges in your account.

The following image shows a Set rule that will include volunteers with fewer than 10 Life hours.



The screenshot shows a configuration interface for a Set rule. It features a radio button on the left, followed by a dropdown menu set to "Fewer than", a text input field containing "10", another dropdown menu set to "Life", and a dropdown menu set to "hours".

4. Option four lets a System Operator pull all volunteers *without* any hours, [Merit Hours \[pg:1564\]](#), or any other [Service Measure \[pg:1557\]](#) recorded. For example, the following image shows a Set rule that would capture volunteers without any Absences (a Service Measure) recorded.



The screenshot shows a configuration interface for a Set rule. It features a radio button on the left, followed by the text "They do not have any", a dropdown menu set to "Absences", and the word "recorded".

5. The next option is to include volunteers who have any number of hours (or other service) recorded on one specific date. This option can be especially important when tracking volunteer service for special events.

In the following example, the "Their service" Set rule is setup so that all volunteers with any hours recorded on December 28, 2007 will be included in the Set.



The screenshot shows a configuration interface for a Set rule. It features a radio button on the left, followed by the text "They have any", a dropdown menu set to "hours", the word "recorded on", and three date dropdowns: "December", "28", and "2007".

6. Alternatively, a System Operator might want to know which volunteers did not serve any hours (or complete other service) on a particular day. The image below shows how to include volunteers who *do not* have any "Calls Answered" (a [Service Measure \[pg:1557\]](#)) recorded on June 1, 2007.




The screenshot shows a configuration interface for a Set rule. It features a radio button on the left, followed by the text "They do not have any", a dropdown menu set to "Calls Answered", the word "recorded on", and three date dropdowns: "June", "1", and "2007".

This option is also helpful because you can combine it with other Set rules. For example, [Help topic 2320 \[pg:0879\]](#) shows how to combine the "Their service" and "Their schedule" rules to find volunteers who did not serve as expected on a given day.


7. The next option checks the number of service records stored on a volunteer's [Service tab \[pg:1581\]](#). This option does not take into consideration the number of hours or other service measures indicated by each entry--it merely counts the number of service records included in the Service box.

The image below shows how to use this option to include volunteers with less than five service records on their Service tab in the Set.



They have Fewer than 5 service record(s)

8. This option will include volunteers in the Set if they have at least one service record that meets the requirements during the time frame selected. This can be useful if you're looking for abnormally small or large service entries. For example, the following settings would find any volunteers who have a service entry with less than 10 minutes of service recorded during any month of 2007.



They have at least one service record with Fewer than 0:10 hours in Any month 2007

Or the following settings will find any records with over 8 hours of service on a single entry during October 2007.



They have at least one service record with At least 8:01 hours in October 2007

*Please keep in mind*, that if you keep [group records \[pg:1909\]](#) or allow [service to be tracked \[pg:2026\]](#) for a range of dates as a lump sum, these could create service entries with over 8 hours of service.

9. Finally, the "Only count service in" box can be checked to further limit the volunteers included in a Set. Mark this option

*in addition to*

one of the options above to include volunteers in the Set only if they have the required service in a specific Site, Place, Assignment or [Assignment Cluster \[pg:0934\]](#). The example below shows how to include volunteers with at least one hour and thirty minutes of service in the "Front Desk" Assignment recorded in the current month.

**Their Service** **Rule**

They have...

At least  hours in

At least  hours between the beginning of   and the end of

Fewer than  Life hours

They do not have any  recorded

They have any  recorded on

They do not have any  recorded on

They have   service record(s)

They have at least one service record with   hours in

Only count service in

[Help](#)

This option can also be used to identify volunteers with service not associated with any Assignment. For example, if volunteers are showing on reports with "(None)" in the Assignment column. In this case, mark the box and choose "No Assignment" from the dropdown list. The following image shows a Set rule that will pick up volunteers with at least 2 hours of service in 2007 that were not associated with any Assignment.

**Their Service** Rule

They have...

At least  hours in

At least  hours between the beginning of   and the end of

Fewer than  Life hours

They do not have any  recorded

They have any  recorded on

They do not have any  recorded on

They have   service record(s)

They have at least one service record with   hours in

Only count service in

[Help](#)

---

## Their Spare Fields Set Rule

Help topic 2201

Added or revised 03-20-08

---

This help topic explains how to define a [Set rule \[pg:0853\]](#) based on any of the "Spare fields" that appear on the Profile tab.

You create Set rules on the Set Definition page. If you're not already on the Set Definition page you can get there by choosing Sets from the [menu \[pg:0215\]](#), and then clicking the **Create a new set** button.

To create a Set of volunteers based on any of the "spare fields," select the desired field name from the "Include volunteers in this set based on" drop down list and make the appropriate selections in the Set rule definition box.

An example of data that might be tracked in a spare field on the Profile tab is Driver's license number. In this example, a Set rule can be used to find volunteers with a Driver's license field that does or does not contain specific characters, or volunteers whose Driver's license field is blank.

The following image depicts a Set rule that would include volunteers with a blank Driver's License field.

---

## Their Characteristics Set Rule

Help topic 2208

Added or revised 11-17-2016

---

This help topic explains how to define a [Set rule \[pg:0853\]](#) based on volunteer characteristics (e.g. skills). You track volunteer characteristics on the Profile tab in the volunteer record.

You create Set rules on the Set Definition page. If you're not already on the Set Definition page you can get there by choosing Sets from the [menu \[pg:0215\]](#), and then clicking the **Create a new set** button.

To create a Set of volunteers based on volunteer characteristics, select the appropriate characteristic (e.g. 'Their skills') from the "Include volunteers in this set based on" drop down list.

In the example of volunteer Skills, after choosing to create a rule based on 'Their skills,' each of the skills tracked by your organization will be listed in a drop down table. Choose the skill of interest, and choose either 'is checked' or 'is not checked' to pick up volunteers who do, or do not, have the skill checked on their Profile tab.

The following image shows how one would create a rule to include volunteers whose 'Accounting' Skill field is checked on the volunteer record Profile tab.

---

## Find the Volunteers With No Recent Activity

Help topic 2222

Added or revised 02-14-2012

---

One easy way to do this is to create a "Set" that finds the volunteers who have not had any service posted recently, and then to view or print the volunteers in this Set.

Create the Set like this:

1. From the [menu \[pg:0215\]](#), select "Sets."
2. Click the **Create a new set** button.
3. Under "What would you like to call this set?" enter a name for the Set. For example "No recent activity."
4. Under "Include volunteers in this set based on" select "Their Service" and then click the **Go** button.
5. Setup the first Rule as shown below. While the example pictured below looks for volunteers with no service in the last 3 months, you can setup this rule to include volunteers with no service in...
  - The current month
  - The previous month
  - The last 1 month
  - The last 2 months
  - The last 3 months
  - The last 4 months

- The last 6 months
- The last year

**Their Service**
Rule

They have...

Exactly  hours in

At least  hours between the beginning of   and the end of

At least  Life hours

They do not have any hours recorded

Only count service in

[Help](#)

6. If you want your list only to include 'Active' volunteers who have no recent activity, add an additional Set rule like this:

A. Under "Add another rule based on..." select "Their current status" and then click the **Go** button.

B. Check the "Active" status (plus any other statuses you may want to include).

7. Click the **Finished** button.

You can now [view \[pg:0861\]](#) or [print \[pg:0863\]](#) the list of volunteers who have no recent activity.

This Set finds volunteers who have no hour entries for the time period you choose for the Set. This approach to finding volunteers with no recent activity works, as long as you track volunteer service in Volgistics.

#### Related help

[Help Topic 2183 \[pg:0861\]](#) - How to view the volunteers in a Set

## How to find volunteers who did not serve as scheduled

Help topic 2320

Added or revised 10-04-2016

You may print a report that you can use to identify volunteers who did not appear for their scheduled shift. In order to do this, all service for the volunteers who did work on the date needs to be entered into the system. Then you will need to create a set to identify volunteers who were scheduled, but did not have service hours recorded.

To do this:

1. Select 'Sets' from the Menu.



2. Click the **Create a new set** button.
3. Give your set a unique title.
4. Under 'Include volunteers in this set based on,' select 'Their Service' and click the **Go** button.
5. Select 'They do not have any hours recorded' and the date you're looking for.
6. Under 'Add another rule based on...,' select 'Their Schedule' and click the **Go** button.
7. Select that the volunteer was scheduled and the date you're looking for.
8. Under 'This set has 2 rules...' make sure the setting is on 'Include volunteers in this Set only if they pass every one of these rules.'
9. Click the **Finished** button

Your completed set should appear like the example below:

**Define a new set**

What would you like to call this set?

Which Volgistics operators should be able to use this Set?  
 Only those at headquarters  
 Operators at any Site

**Include volunteers in this set if...**

**Their Service** Rule

They have...

At least  hours in

At least  hours between the beginning of   and the end of

At least  Life hours

They do not have any hours recorded

They have any hours recorded on

They do not have any hours recorded on

Only count service in

[Help](#)

**Their schedule** Rule

They  are  are not  scheduled on

scheduled in

[Help](#)

**This set has 2 rules...**

Include volunteers in this Set only if they pass **every one** of these rules  
 Include volunteers in this Set if they pass **any single one** of these rules

Add another rule based on...

If you want this set to have an additional rule, select the kind of rule you want to add and then click the Go button.

Click the **Finished** button if you are finished defining this set

[Help](#)

This set can be used run a report by following the steps in [help topic 2184 \[pg:0863\]](#).

## Related help

[Help topic 2180 \[pg:0858\]](#) - Sets

[Help topic 2183 \[pg:0861\]](#) - How to view the volunteers in a Set

[Help topic 2275 \[pg:1424\]](#) - Tracking Volunteer Absences

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## Their Postal Mail Set Rule

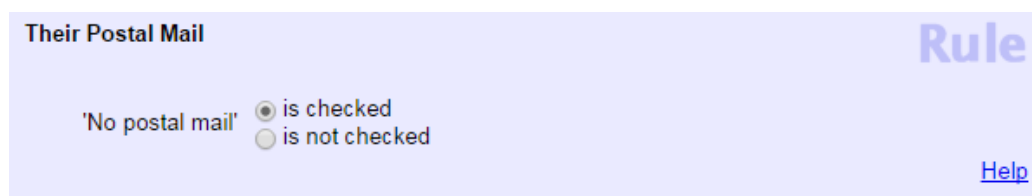
Help topic 2714

Added or revised 09-22-2014

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This help topic explains how to define a [Set rule \[pg:0853\]](#) based on whether or not the *No postal mail* box on the [Core tab \[pg:1868\]](#) of the volunteer's record is checked or un-checked. When the box is checked, the system automatically prevents the volunteer's information from being included on any [Address Label reports \[pg:0483\]](#) run in your account. If this field is checked, it means that the volunteer (or your organization) has specifically decided the volunteer should not have information sent to them using postal mail. This could be used when more than one person in the household volunteers with your organization, or the volunteer has been dismissed but you still need to keep a record for him or her.

The image below shows how to define a rule that will capture all volunteers for whom the *No postal mail* box is checked.



You can also use this Set rule to find all volunteers who do not have the *No postal mail* box checked. The image below shows how to define a rule to identify these volunteers.

---

## Their Kind Set Rule

Help topic 2877

Added or revised 05-12-14

---

This help topic explains how to define a [Set rule \[pg:0853\]](#) based on the record's *Kind* field. The *Kind* field is used to identify [group \[pg:1909\]](#) or individual volunteer records.

You create Set rules on the Set Definition page. If you're not already on the Set Definition page, you can get there by choosing Sets from the [menu \[pg:0215\]](#), and then clicking the **Create a new set** button.

To create a Set of volunteers based on volunteer Kind, select

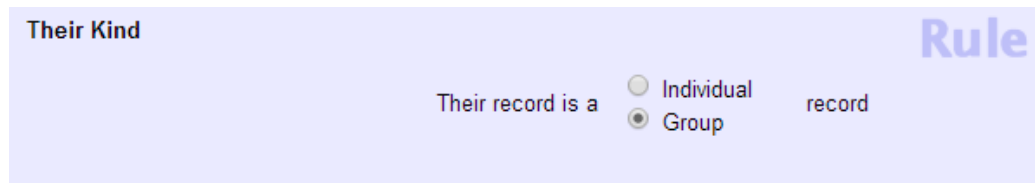
*Their Kind*

from the

*Include volunteers in this set based on*

dropdown list. This Set rule can capture volunteers who are either individual or [group \[pg:1909\]](#) records.

The following image shows a Set rule that would pick up all volunteers that are listed as group records:



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## Their Daily Availability Set Rule

Help topic 2878

Added or revised 05-12-14

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This help topic explains how to define a [Set rule \[pg:0853\]](#) based on the selections a volunteer has made in their *Daily availability* field.

This option will only appear when making a Set if you are using pre-set intervals (instead of actual times) to track availability. You can check this setting, and setup your *Daily availability* field if necessary, by:

1. Select [Setup \[pg:0887\]](#) from the menu.
2. Expand the *Field options* link.
3. Select *Profile tab (for volunteers)*.
4. Select *Daily availability*.
5. Be sure the *Track daily availability using* option is set to *These pre-set intervals*.

Thursdays  
 Fridays  
 Saturdays

**Track daily availability using**

Actual times  
 These pre-set intervals: 

1.

2.

3.

4.

5.

6. If necessary, change the default intervals and other setup options for the field.

7. Click the **Save** button at the bottom of the page to exit.

After you have made sure the

#### *Daily availability*

field is setup to use pre-set intervals, you can make a Set based on it on the Set Definition page. If you're not already on the Set Definition page, you can get there by choosing Sets from the [menu \[pg:0215\]](#), and then clicking the **Create a new set** button.

To create a Set of volunteers based on their availability, select *Their daily availability* from the *Include volunteers in this set based on* dropdown list.

The options for including volunteers in the Set will vary depending on the setup of the *Daily availability* field in your account, and your selections when you define the Set. Here are some examples of how this can be used.

#### Example One

If an account has the *Daily availability* field setup with the default settings where each weekday is available and the pre-set intervals are Morning, Afternoon and Evening, this image shows how they could find volunteers who are available in the afternoon *or* evening on Fridays:

**Their daily availability** Rule

On  their availability is  any of these...  
 all of these...

Morning  
 Afternoon  
 Evening

Note that the rule has "any of these" selected for the *or* option. If they selected "all of these," only volunteers with both Afternoon and Evening would appear in the Set.

Example Two

A food bank has their *Daily availability* field setup with Monday through Friday selected and two hour shifts running from 6:00 am to 10:00 pm entered as the pre-set intervals. This image shows how they could make a Set to find volunteers to fill a four hour shift from 6:00 am to 10:00 am on Monday morning:

**Their daily availability** Rule

On  their availability is  any of these...  
 all of these...

6:00 am - 8:00 am  
 8:00 am - 10:00 am  
 10:00 am - Noon  
 Noon - 2:00 pm  
 2:00 pm - 4:00 pm  
 4:00 pm - 6:00 pm  
 6:00 pm - 8:00 pm  
 8:00 pm - 10:00 pm

Notice that the "all of these" option is selected so that the Set will only find records where both items are selected. If "any of these" were selected, the Set would find volunteers with either the two hour "6:00 am - 8:00 am" shift selected *or* the two hour "8:00 am - 10:00 am" shift selected.

Example Three

A music festival that takes place over Memorial Day weekend has their *Daily availability* field setup to *Track daily availability for these dates only* and has entered May 23, 2014 as the beginning date and May 26, 2014 as the ending date. They have entered six shift ranges volunteers can select as the pre-set intervals. This image shows how they could find volunteers available to work security on Sunday, May 25, 2014:

**Their daily availability** Rule

On  their availability is  any of these...  all of these...

- Setup 10am - Noon
- Afternoon Noon - 5pm
- Evening 5pm - 10pm
- Teardown 10pm - 11pm
- Security 11pm - 4am
- Security 4am - 10am

## Their Country Set Rule

Help topic 2879

Added or revised 05-12-14

This help topic explains how to define a [Set rule \[pg:0853\]](#) based on whether or not a volunteer has a certain country entered into the [Country \[pg:1302\]](#) field.

This option will only appear when making a Set if the *Hidden* setting on the Country field's setup page is set to *No*. You can make this change, and setup the items in your Country dropdown if necessary, by:

1. Select [Setup \[pg:0887\]](#) from the menu.
2. Expand the *Field options* link.
3. Select *Core tab*.
4. Select *Country*.
5. Change the *Hidden* setting to *No*.

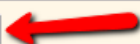
**Field Properties** Save Cancel

**Country**

Field location: **Core tab**

Type of field: **Dropdown**

Field name:

Hidden:  

Require an entry:

Default entry:

**Drop down table items**

Add a new item:  Save

Australia	Delete	Merge
Bahamas	Delete	Merge

6. If necessary enter a country you want on your list in the *Add a new item* field and click the **Save** button to the right of the field. Repeat this step until all the countries are added.

7. Click the **Save** button at the bottom of the page to exit.

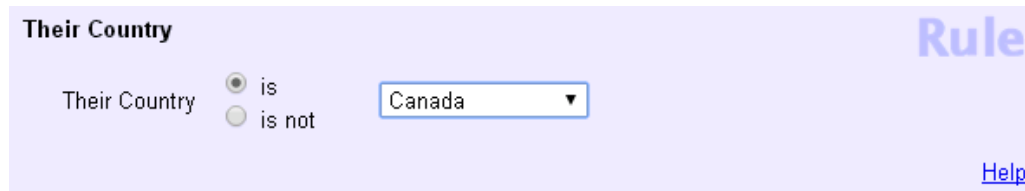
After you have made sure your Country field is not hidden, you can make a Set based on it on the Set Definition page. If you're not already on the Set Definition page, you can get there by choosing Sets from the [menu \[pg:0215\]](#), and then clicking the **Create a new set** button.

To create a Set of volunteers based on their country, select *Their Country* from the *Include volunteers in this set based on* dropdown list.

The *Their Country* Set rule includes volunteers based on the data recorded in the Country field on the [Core tab \[pg:1868\]](#) on the volunteer record.

This Set rule can capture volunteers who have a certain country entered on their record, or specifically do not have a certain country on their record.

The following image shows a Set rule that would find all volunteers with Canada entered as their country:



You can also use your Set to find volunteers based on if the field is blank. For example, if you needed to identify all volunteers who *have* a country selected, you could do this by setting up the rule as shown in this image:

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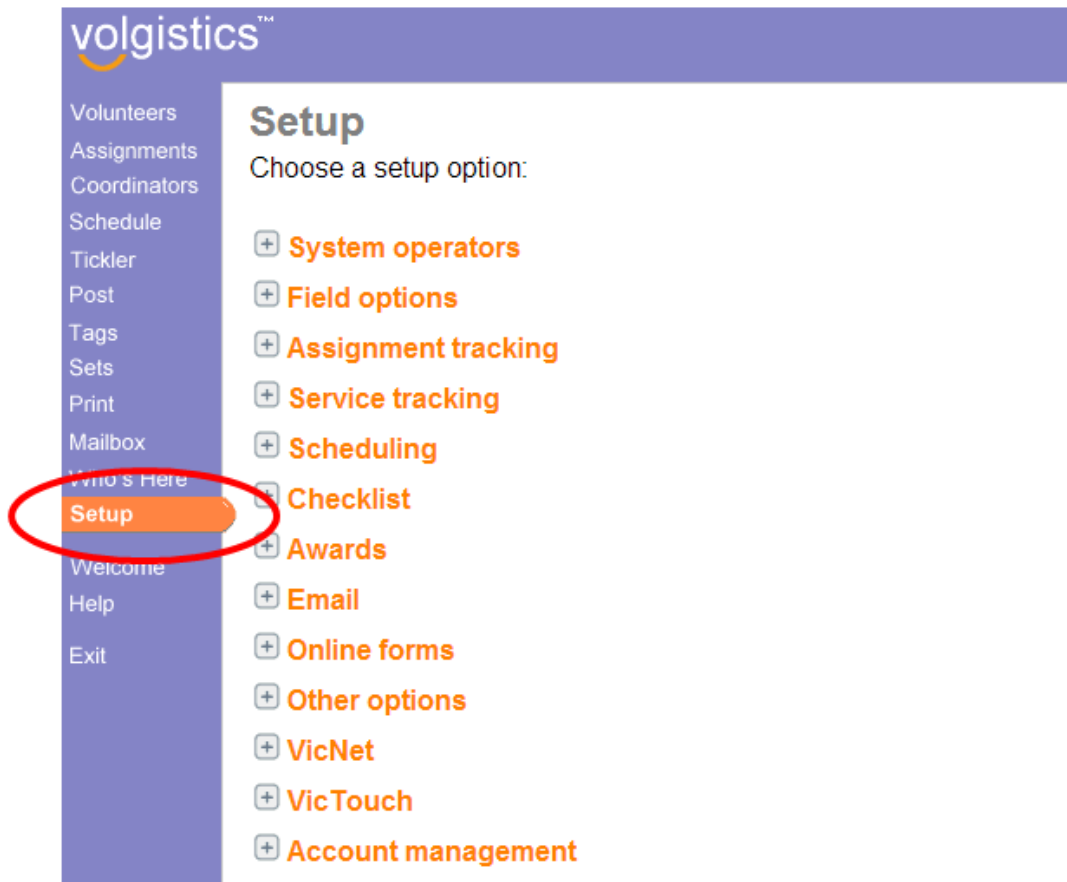
## Setup

Help topic 2241

Added or revised 10-05-2012

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The Setup menu option opens the Setup page.



The Setup page includes links to the system setup and configuration options.

Your organization's [Volgistics Administrator \[pg:0052\]](#) controls which Volgistics operators have access to the Setup page. If the Setup option does not appear on your Volgistics menu, you do not have access to the Setup controls. In this case you should contact your organization's Volgistics Administrator for assistance with configuration changes.

If you're unsure of whom the Administrators are for your account, or you want to check your operator record's access settings, you can do this by:

1. Select Help from the Menu.
2. Click the "Operator information" link at the bottom of the page.



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## Managing Volgistics Cookies

Help topic 1183

Added or revised 05-08-2008

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**Cookies** [pg:1615], or small pieces of information websites can save on your computer, can be permitted or blocked, either completely or from specific websites. Cookies from volgistics.com can be used to save login credentials at a computer.

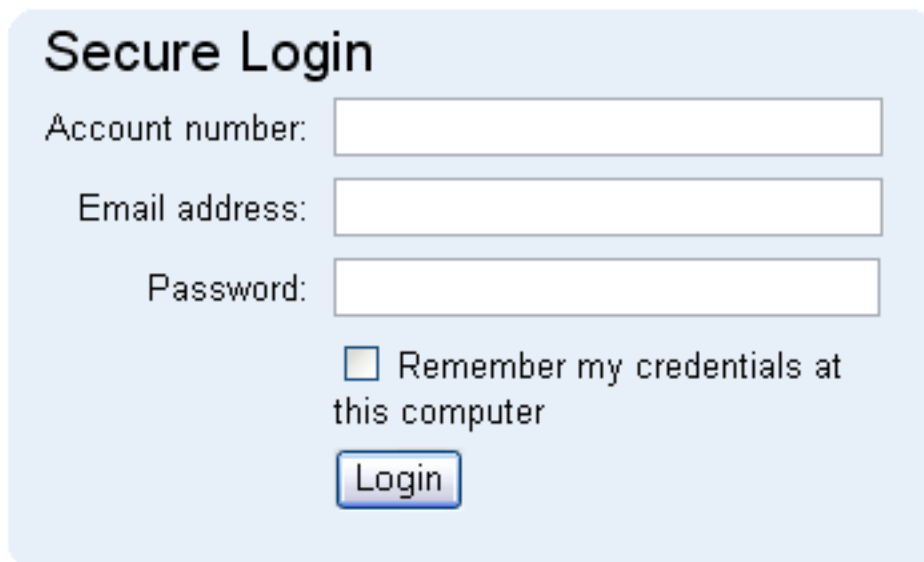
If you have access to Setup and you would like to manage cookies from volgistics.com, you can do so on the Cookies page. If you're not already on this page, you can get there by choosing Setup from the [menu \[pg:0215\]](#), choosing 'Account management,' and then selecting 'Cookies.'

### Clear

Clicking the **Clear** button will remove any Volgistics login credentials that were previously saved on this computer. A user will have to enter their complete login credentials the next time they login at this computer.

As long as Cookies from volgistics.com have not been blocked *after* being cleared on the Cookies page, users will see the "Remember my credentials at this computer" checkbox option on the Login page.

The Secure Login box after the **Clear** button has been clicked:



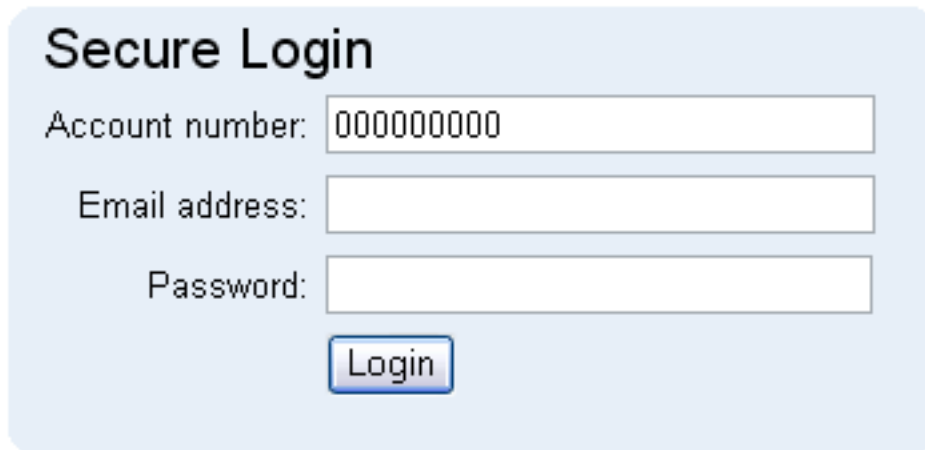
The image shows a light blue rounded rectangular box titled "Secure Login". Inside the box, there are three input fields: "Account number:", "Email address:", and "Password:". Below the "Password:" field is a checkbox labeled "Remember my credentials at this computer". At the bottom of the box is a "Login" button.

### Block

Clicking the **Block** button will prevent login credentials from being saved on this computer. This is particularly useful when multiple system operators work at the same computer, as it prevents any user from saving their login information on the Volgistics Login page.

When cookies from Volgistics are blocked from the Cookies page, the Login page remembers the account number but not any user's email address or password on that computer. The Login page also no longer contains the "Remember my credentials at this computer" checkbox.

The Secure Login box after the **Block** button has been clicked:

A screenshot of a 'Secure Login' form. The form is contained within a light blue rounded rectangle. At the top, the title 'Secure Login' is displayed in a large, bold, black font. Below the title, there are three input fields: 'Account number:' with the value '000000000', 'Email address:', and 'Password:'. Each field is a simple white rectangle with a thin border. Below the 'Password:' field is a blue 'Login' button with white text and a slight shadow.

**Note:** The "Clear" and "Block" functions on this page apply *only* to the computer on which the buttons are clicked. For example, if you want to prevent system operators from saving their login credentials on one specific computer that is shared by multiple users, you should go to the Cookies page on that shared computer to block cookies.

**Related help**

[Help Topic 2255 \[pg:1615\]](#) - Cookies

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## Restore All Archived Volunteer Records

Help topic 2038

Added or revised 10-05-2016

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To restore all archived volunteer records:

1. Choose [Setup \[pg:0887\]](#) from the menu.
2. Select "Account Management."
3. Click "Restore all archived volunteer records."
4. Follow the directions on that page.

**Related help**

[Help Topic 1997 \[pg:0442\]](#) - Including Archived Records on Reports

[Help Topic 1998 \[pg:1817\]](#) - Finding Archived Volunteer Records

[Help Topic 1999 \[pg:0709\]](#) - Archived Versus Non-Archived Records

[Help Topic 2000 \[pg:1819\]](#) - Archiving Volunteer Records

[Help Topic 2001 \[pg:1822\]](#) - Delete Archived Volunteer Records

[Help Topic 2034 \[pg:1852\]](#) - How do I restore a volunteer record from the archive?

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# Clearing Your Account

Help topic 2112

Added or revised 01-13-2016

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**Volgistics Administrators** [pg:0052] can clear all of the information from their Volgistics account. Clearing your account wipes the information for your account from the system.

In most cases, *you should not clear an established Volgistics database that you want to continue using*. However, there are some unique circumstances when starting over is useful. Here are some examples:

-You have a new Volgistics account and you've been experimenting with different customizations and test records. You want to clear the account all at once so you can get started with real information.

-You are using one of the conversion options to import information from another program. Once the import is finished you examine the data and find things you'd like to change about the way the import handled the data. As long as you have not started adding new data, you can clear the account and repeat the process with the changes.

-You inherited a Volgistics account that was not maintained for some time, and feel the most effective approach is to clear the account and start over.

## **Clear your account only when you are certain that:**

### **1.**

You understand what will happen when you clear your account. Read and understand this help topic before proceeding.

### **2.**

You no longer want to keep any of the information in your Volgistics account.

**3.** You have the authority in your organization to do this (only **System Operators** [pg:0065] who are **Administrators** [pg:0052] can clear their account).

## **What is removed when you clear an account?**

When you clear your account, the following information is deleted from your account. This includes:

- Every non-archived volunteer record
- Every **archived** [pg:1819] volunteer record
- All **service entries** [pg:1581] (hours)

- All [Site, Place, and Assignment \[pg:0096\]](#) records
- All [Coordinator \[pg:0163\]](#) records
- Everything in your Volgistics mailbox (except help inquiries) including any report files in your [In Box \[pg:0303\]](#) and sent messages in your [Out Box \[pg:0362\]](#)
- All [custom reports \[pg:0467\]](#) you've created unless you choose to keep reports
- All [System Operators \[pg:0065\]](#) unless you ask to keep your account setup
- All of the [Setup \[pg:0887\]](#) options for your account unless you ask to keep your account setup
- All [VicDoc \[pg:1648\]](#) documents currently stored for records

### Who will clearing your account affect?

Clearing your account affects everyone who uses it. Here are some of the things that happen to access when you clear an account:

- Unless you choose to keep your account setup, no one but you will have credentials to access your account once it's cleared. You will need to [enter new System Operators \[pg:1440\]](#) to give others access.
- Even if you use [Site Level Access \[pg:0092\]](#), all volunteer, Site, Place, Assignment, Coordinators, and documents are deleted for all Sites. There *is not* a procedure for clearing the information for just a single Site.
- Volunteers will not have access to any information at [VicNet \[pg:1724\]](#) until you re-enter their records and assign temporary passwords.
- If you use [VicTouch \[pg:1778\]](#), volunteers will not be able to sign-in until you re-enter their records and PIN's.

Clearing your account does not change your account status or payment information. If you have a paid account, clearing your account does not change your service level, billing contact, or payment arrangements. Clearing a trial account does not change the trial account expiration date.

### How to clear your account

1. Choose [Setup \[pg:0887\]](#) from the menu.
2. Expand the *Account management* link.
3. Select *Clear account*.
4. Follow the instructions on the screen.

When you clear your account you can optionally keep your current account setup and reports, and save any [VicDoc \[pg:1648\]](#) documents you have uploaded. See the sections below for more information on this.

### Keep account setup

It's a good idea to keep your account setup if you're satisfied with the way you have your account customized, but you want to start over with new volunteer, Site, Place, Assignment, and Coordinator information. Do not keep your account setup if you want to start completely over from scratch.

By default, the *Keep account setup* checkbox is checked and disabled. This is because the *Keep reports* checkbox is checked and the only way reports can be saved is if the account setup is also saved. If you wish to delete the account's setup, you will need to un-check the *Keep reports* checkbox and then un-check the *Keep account setup* checkbox.

If you choose to keep your account setup, all of the customization options that appear under the Setup menu are preserved, including:

- All [System Operators \[pg:0065\]](#). However, if you use [Site Level Access \[pg:0092\]](#), any Site Level Access restrictions that System Operators had previously are removed.
- All [field customizations \[pg:0957\]](#) including custom field names, default values, and hidden fields.
- All [dropdown list \[pg:0963\]](#) (look-up table) values.
- Any Service Tracking customizations you've made remain including special [Service Measures \[pg:1557\]](#) and [Service Values \[pg:0516\]](#) you've setup.
- All [Checklist items \[pg:0142\]](#).
- All [Awards \[pg:1551\]](#).
- All [Sets \[pg:0858\]](#).
- All Volunteer [Application Forms \[pg:0413\]](#).
- Your organization [logo \[pg:1353\]](#) if one was provided.

Keeping your account setup **does not** save any assignments you currently have in your account. Clearing your account always deletes all Sites, Places, and Assignments.

If you choose

*not*

to keep your account setup, all the customization options that appear under the Setup menu (including those listed above) are deleted or reset. In this case your account will appear as if it was brand new, and you'll need to start over again with any customizations you want your account to have. To help you with this, the [Getting Started Interview \[pg:0200\]](#) will be repeated the first time you [login \[pg:0220\]](#) after clearing your account.

## **Keep reports**

The *Keep reports* checkbox is checked by default. In order for the *Keep reports* checkbox to be checked, the *Keep account setup* checkbox must also be checked. There is not a way to save reports without also saving the account's setup.

When the *Keep reports* checkbox is checked, it means that any [custom reports \[pg:0467\]](#) created in your account will still be available after you clear your account. [Stock reports \[pg:0595\]](#) are not impacted by clearing your account so they will be available after the account is cleared no matter if the *Keep reports* checkbox is checked or un-checked.

If you do not want custom reports to be saved, un-check the *Keep reports* checkbox before clearing your account.

Please note that this option saves the actual setup of the custom report, but not the content of completed [PDF \[pg:1606\]](#) and [Excel \[pg:0513\]](#) reports that have already been run. You will need to [save your reports \[ \]](#) to your local computer if you want them to be available after clearing your account. Clearing your account deletes all content from the [In Box \[pg:0303\]](#) tab of your Volgistics mailbox.

### **Download all VicDoc Documents**

If your account uses the [VicDocs \[pg:1648\]](#) feature, you will see a checkbox for downloading VicDoc documents when you clear the account. If you do not see this checkbox, your account's [service level \[pg:0719\]](#) does not include the VicDocs feature.

When the *Download all VicDoc Documents* checkbox is checked, all documents uploaded to the Docs tab of [volunteer \[pg:1630\]](#), [Coordinator \[pg:1636\]](#), and [Site, Place, and Assignment \[pg:1642\]](#) records will be gathered into a zip file when the account is cleared. This zip file will be available for 5 days on the [In Box \[pg:0303\]](#) tab of your account when you login after clearing your account. You will need to save the file to your local computer during the 5 days it is available. It will not be available after the 5 days end.

There is not a way to make a bulk upload of all the documents in the zip file to the account again. You would need to upload the documents individually to the Docs tab of each record if you want the documents to be in the account after the account is cleared.

### **Start**

There is not a way to undo clearing your account once the process has started so Volgistics requires several confirmation safeguards to be sure you wish to proceed. If you have read and agree to all the terms regarding clearing your account, enter "Yes" in the *Do you acknowledge the four items listed above?* field and click the **Start** button. At this point you can still cancel if you wish by clicking the **Cancel** button. If you wish to proceed, enter your password and click the **Continue** button. *Once a valid password is entered and the **Continue** button is clicked, you cannot stop the clearing process. There will not be a way to restore your account's information.*

Clearing your account may take as long as twenty to thirty minutes to complete. During this time you will not be able to login. Once Volgistics has finished clearing your account, you can login again.

If you chose to keep your account setup, any System Operators you had before you cleared your account will be able to login again. If you choose not to keep your account setup, only the Volgistics Administrator who cleared the account can login. To do this he or she will use the same login name and password that was used to clear the account because there will not be any other System Operator records left in the account.

When you login after clearing your account, you will not have any records for volunteers, Sites, Places, Assignments, or Coordinators.

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## How do I cancel an account?

Help topic 2262

Added or revised 01-25-2016

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You may cancel your Volgistics account at any time. For security, Volgistics' policies require all cancellations to be performed by an [Administrator \[pg:0052\]](#) for the account.

To cancel your account:

1. Log in to Volgistics.
2. Choose [Setup \[pg:0887\]](#) from the menu.
3. Select "Account management."
4. Select "Cancel account."
5. Follow the instructions on the Cancel Account page to cancel.

When you cancel an account you can no longer use Volgistics. Cancelling an account destroys all information in the account, including volunteer records, all of the account configuration settings, and all of the information about your organization. If your account contains volunteer data you wish to save, you must [retrieve your information from your account \[pg:0461\]](#) before you cancel. Data cannot be retrieved from cancelled accounts.

Once you cancel your account, Volgistics stops billing your credit card for the monthly service fee. There is no refund of any fees you may have already paid, or credits.

### VicDocs and Account Cancellation

If you use the optional [VicDocs module \[pg:1648\]](#), the last page of the cancellation process will include an option to receive any documents uploaded to the Docs tab of [volunteer \[pg:1630\]](#), [Coordinator \[pg:1636\]](#), and [Site, Place, or Assignment \[pg:1642\]](#) records. If this option is selected, the documents will be placed in a zip file when you cancel and a link to download these documents will be sent to the email address of the Administrator cancelling the account.

**Please note:** *The link to download the zip file of documents will only stay active for 5 days after you cancel the account. If you do not sign-in to your email, click the link, and then save the documents to your local computer during the 5 day period after the account is cancelled, the documents will no longer be available.*

**Want to start over?**

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# Assignment Tracking Ground Rules

Help topic 2047

Added or revised 01-13-2016

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Use the Assignment Tracking Ground Rules page to customize basic system functions that are related to Assignment tracking. If you're not already on the Assignment Tracking Ground Rules page and you have access to the Setup area, you can get to this page by choosing Setup from the menu, selecting 'Assignment tracking,' and then clicking 'Ground Rules.'

## Assignment Page

Display the Assignment page in a collapsible format

If you have more than one Site listed on the Assignments page you can optionally choose to initially see your Assignments as a *collapsible* list of Sites, or with the list of Sites, Places, and Assignments fully expanded.

If "Display the assignment page in a collapsible format" **is** checked, the Assignments page will always open with your Sites, Places, and Assignments in a collapsed list, as shown here:

 **Central City**

 **Southhaven**

When the Assignment list is displayed in this format, you can click the plus icon next to a Site name to expand the list of Places and Assignments under that Site, and you can click the minus icon next to an expanded Site to collapse that Site.





## **Central City**

[Add a new Place](#)

### **Direct Services**

[It's Fun to Read](#)

[Tutor](#)

[Add a new assignment](#)

### **Support Services**

[Information Desk](#)

[Speaker's Bureau](#)

[Add a new assignment](#)



## **Southhaven**

If you have many Sites, choosing to display your Assignments as a collapsible list can make it easier for you to navigate on the Assignments page.

If "Display the assignment page in a collapsible format" is **not** checked, the Assignments page will always open with your Sites, Places, and Assignments in a fully expanded list, as shown here

## Central City

[Add a new Place](#)

### Direct Services

[It's Fun to Read  
Tutor](#)

[Add a new assignment](#)

### Support Services

[Information Desk  
Speaker's Bureau](#)

[Add a new assignment](#)

## South Region

[Add a new Place](#)

### Direct Services

[Book Cart](#)

[Add a new assignment](#)

Selecting 'Display the assignment page in a collapsible format' will only affect the appearance of the Assignment page for System Operators who see more than one Site. If you use the [Site Level Access \[pg:0092\]](#) features, [System Operators \[pg:0065\]](#) who have access to just one Site will always see just their own Site listed on the Assignments page no matter which option you choose here.

#### Always display this Site expanded

If you select 'Display the assignment page in a collapsible format' you can optionally choose to have a specific Site always initially appear expanded. This is useful in organizations that manage ongoing events where each year's (or each season's) Assignments are created under a different Site. Choosing the current year's (or season's) Site here will cause that Site to initially appear expanded while all previous years' Sites will initially appear collapsed.

Check this checkbox and then choose the Site you wish to initially appear expanded if you want your Assignments page to open this way. This setting applies to the Assignments page for all [System Operators \[pg:0065\]](#) who can see more than one Site.

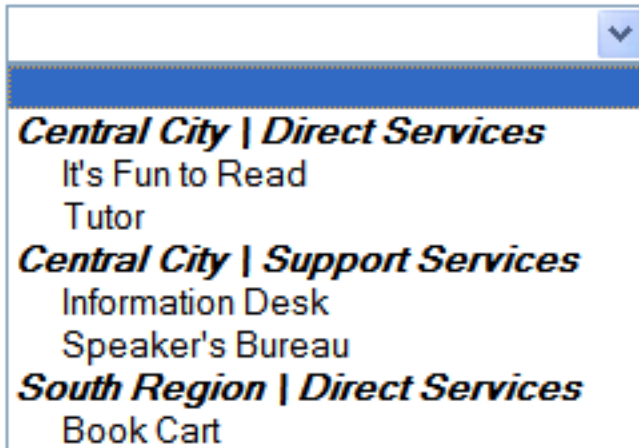
#### **Assignment dropdown list format**

When you post volunteer service in Volgistics you can optionally record the assignment where the service was performed. You use an Assignment dropdown list, or look-up table, to select the assignment on the service entry. Similar assignment dropdown lists appear in schedule reports, and other locations throughout Volgistics.

This option controls the format used to display your Assignments in these dropdown lists. Choose the format you prefer here.

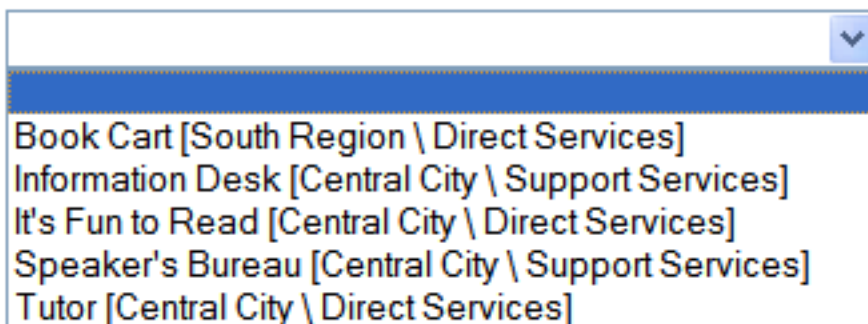
Hierarchical format

Choose this format if you prefer to see Assignments listed according to their Site and Place, as shown in this example:



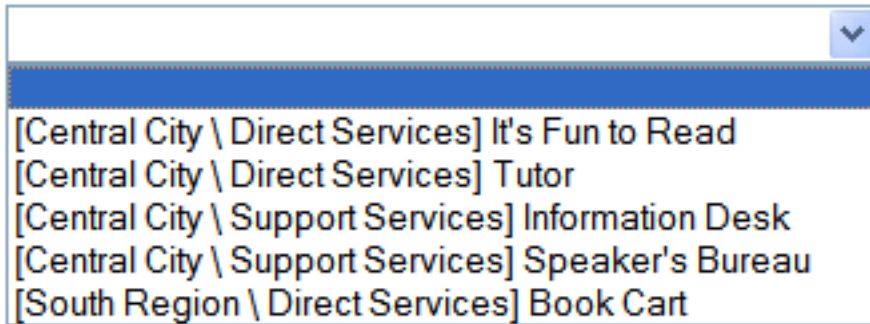
List format "Assignment name [Site\Place]"

Choose this format if you prefer to see Assignments listed alphabetically, with their Site and Place names in brackets following the Assignment name, as shown here:



List format "[Site\Place] Assignment name"

Choose this format if you prefer to see Assignments listed alphabetically by Site and Place name first, as shown in this example:



The Assignment dropdown list format selected here applies to all [System Operators \[pg:0065\]](#).

### Automatic assignments

Volgistics can automatically maintain this list of assignments for each volunteer based on the service and schedule entries. Check 'Record assignments automatically' if you want Volgistics to do this.

Click the **Make this retroactive** button if you want Volgistics to apply automatic assignments retroactively.

[Help topic 2265 \[pg:0906\]](#) explains more about how automatic assignments work, and what happens when you apply this feature retroactively.

### Related help

[Help Topic 2099 \[pg:0096\]](#) - Tracking assignments

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## Volunteer & Assignment Matching

Help topic 2249

Added or revised 02-13-2017

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Volunteer and Assignment matching compares the age, availability, characteristics, and preferences of each volunteer to the minimum age, availability needed, characteristics, and preferences of a selected Assignment. Volgistics counts volunteers as matched if they meet the minimum match criteria for the Assignment. Click on a link in the Content section below to be taken directly to that heading in the help topic.

### Content

- Set up volunteer & Assignment matching
- How do you include or exclude an Assignment from matching?
- Where do you enter data for matching?
- How are volunteers and Assignments matched?
- How to make a mandatory matching criterion
- Find volunteers that match your Assignment
- Find Assignments that match a volunteer

### Set up volunteer & Assignment matching

Before Volgistics can start matching volunteers and Assignments you must turn this feature on:

1. Choose [Setup \[pg:0887\]](#) from the Volgistics [menu \[pg:0215\]](#).
2. Select "Assignment tracking".
3. Click the "Ground rules" link.
4. Check "Use volunteer & Assignment matching features".
5. Click the **Save** button.

### **How do you include or exclude an Assignment from matching?**

You can tell Volgistics whether or not a particular Assignment should be used for matching on the Profile tab of that Assignment's record. To get there:

1. Choose Assignments from the menu
2. Click the Assignment you would like
3. Go to the Profile tab
4. Here you can check (or uncheck) "This assignment is one that volunteers may be matched to".
5. Click the **Save** button to save your change.

### **Where do you enter data for matching?**

You enter a volunteer's age, availability, [characteristics \[pg:0033\]](#), and preferences on the Profile tab in the volunteer record. You can assign a volunteer [Flags and a Type \[pg:0212\]](#) on the Core tab of their record.

You enter the minimum age, required Type and Flag, times that volunteers are needed, and characteristics for an Assignment on the Profile tab in the Assignment record.

### **How are volunteers and Assignments matched?**

Volunteers and Assignments are matched based on the minimum age, Flag, Type, availability, characteristics, and preferences.

#### Minimum age

If an Assignment has a minimum age entered on its Profile tab, only volunteers who have an age entered that is equal to or greater than that minimum will be matched to the Assignment. So if an Assignment has a minimum age of 18, no volunteer who is 17 or younger will be matched to it, regardless of how well they match the other criteria. Volunteers will also not be matched if they do not have any age entered.

#### Flag and Type

You can select a specific [Flag or Type \[pg:0212\]](#) that volunteers must have on the Profile tab of each Assignment. When a Flag and/or a Type is selected from the dropdown list, volunteers will only be matched to that Assignment if their record has the specific Flag and/or Type. If your volunteers don't need a specific Flag or Type for the Assignment, we recommend leaving those fields blank.

## Availability

If you track daily availability and an Assignment has some times needed entered on its Profile tab, then volunteers will only be matched if there is at least some overlap between the times needed in the Assignment and their own daily availability on the Profile tab of their volunteer record. If you track availability as actual times, there must be an overlap of at least 15 minutes on at least one day. If you track availability in pre-set intervals (e.g. Morning, Afternoon, and Evening) then the volunteer must have at least one interval checked on at least one day that is the same as the Assignment.

If you don't track daily availability or if no times needed have been entered for the Assignment, then availability will not be considered when matching volunteers to this Assignment.

If you'd like to track availability for both volunteers and Assignments, but you don't want the system to use it for matching, you can do so like this:

1. Choose **Setup** [pg:0887] from the Volgistics **menu** [pg:0215].
2. Select Field options.
3. Click Profile tab (for volunteers).
4. Click Daily availability.
5. Uncheck "Use availability information when matching volunteers and assignments".
6. Click the **Save** button to save your changes.

## Characteristics

Each **characteristic field** [pg:0033] in Volgistics can be configured to be used for volunteers only, for Assignments only, or for both volunteers and Assignments. If a characteristic field is used for both volunteers and Assignments, it can be used for matching. If an Assignment has a selection in one of these fields, volunteers will only be matched to that Assignment if they have at least one of the same options selected on the Profile tab of their volunteer record.

For example, suppose the Assignment 'Tax Help' requires volunteers to have some accounting experience. You might have a characteristic field called 'Skills' set up on the Profile tab in the volunteer record to capture skills and experience the volunteer might have. If the characteristic field is configured to be used for matching, then it will also appear on the Profile tab of the Assignment record.

The screenshot shows a 'Field Properties' dialog box for a characteristic field named 'Skills'. The dialog has a title bar with 'Save', 'Delete', and 'Cancel' buttons. The field is titled 'Skills' and is located on the 'Profile tab'. The type of field is 'Characteristic'. The characteristic name is 'Skills' and it can be chosen 'As many as you want'. Under 'Use this for...', there are three radio button options: 'Use this characteristic for matching volunteers and assignments. This characteristic appears on the Profile tab for both volunteers and assignments.' (which is selected and highlighted with a red box), 'Track this characteristic for volunteers only. This characteristic appears on the Profile tab for volunteers only', and 'Track this characteristic for assignments only. This characteristic appears on the Profile tab for assignments only'.

In the Assignment record, you indicate what skills are required. So you would check 'Accounting'.

## Tax Help

Assignment Coordinators **Profile** Description Volunteers Schedule Rules

Save Cancel

**Basics**

Minimum age:

This assignment is one that volunteers may be matched to

Match volunteers to this assignment only if their record has...

This Flag:

This Type:

**Time needed**

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Morning:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Afternoon:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Evening:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Availability needed:

From:  to:

Volunteers serve up to:  hours

**Skills**

Accounting  Data Entry  Office Work

Telephone Answering  Writing/Publishing

**Languages**

On the volunteer record, you would only check 'Accounting' if the volunteer has the necessary skill. With this arrangement, a volunteer will only be matched to 'Tax Help' if they have 'Accounting' checked in the 'Skills' field.

**volgistics**  
Volunteer Logistics

**Volunteers** **Bailey, George**

Assignments  
Coordinators  
Schedule  
Tickler  
Post  
Tags  
Sets  
Print  
Mailbox  
Who's Here  
Setup  
Welcome  
Help  
Exit

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Morning:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Afternoon:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Evening:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

My availability is:

From:  to:

I would like to serve up to:  hours

**Assignment Preference**

**Add**

Assignment:

**Skills**

Accounting  Data Entry  Office Work  
 Telephone Answering  Writing/Publishing

If you have a characteristic field that is configured to be used for matching, but an Assignment doesn't require any particular items in that field, just leave all of those options blank in the Assignment record.

### Preferences

In Volgistics, [preference fields \[pg:1011\]](#) can be set up to allow volunteers to select preferences based on Site, Place, or Assignment, as well as [Cluster \[pg:0934\]](#), [State \[pg:1016\]](#), or other custom dropdown lists in your Assignment records. In addition, they can be configured to allow volunteers to rank preferences ordinally (1st, 2nd, and 3rd choice), by importance (must be, must not be), or with no ranking.

If preferences include "Must be" or "Must not be" ranking, then only Assignments that match the preferences will be considered a match.

If preferences are not ranked or ranked ordinally, an Assignment will only be considered a match for a volunteer if the Assignment matches at least one item in each of the volunteer's preference fields.

### How to make a mandatory matching criterion

A mandatory match criterion would be a simple option you can choose which the volunteer is required to match in order to match the Assignment. For example, if an Assignment requires volunteers to be CPR certified, volunteers who are not certified should not be matched to it.

The easiest way to do this would be to use the [Type or Flags field \[pg:0212\]](#). Flags are already a great way to track different levels of training for the purposes of self-scheduling, this simply extends that use to matching as well. You could create a Flag called "CPR Certified" and apply it to those volunteers who are actually certified. Then you can configure the Profile tab of the Assignment with that Flag. With this arrangement, volunteers will only be matched to this Assignment if they have the appropriate Flag.



## Emergency Department

Assignment Coordinators **Profile** Description Volunteers Schedule Rules

Save Cancel

**Basics**

Minimum age:

This assignment is one that volunteers may be matched to

Match volunteers to this assignment only if their record has...

This Flag:

This type:

If you need to add more mandatory criteria than these, you could create additional characteristic fields with just one or two options. For example, if an Assignment requires volunteers to be CPR certified, and you're already using the Flag and Type fields for other requirements, you could define a Characteristic field like this

**CPR Certified**

No  Yes

Clear

With this configuration, volunteers will only be matched with this Assignment if they also have this same item selected on the Profile tab of their record.

### Find volunteers that match your Assignment

Now that you have volunteer & Assignment matching set up, you can find the volunteers who match an Assignment. To do this:

1. Select Assignments from the Volgistics [menu \[pg:0215\]](#).
2. Click on the Assignment for which you want to match volunteers.
3. Select the Volunteers tab for the Assignment.
4. Choose "These volunteers".
5. Under Status, check all volunteer Statuses you wish to include in this match.
6. Under [Role \[pg:0103\]](#), if you wish to see volunteers that already have a Role in this Assignment, check all the Roles you want to include. If you do not want to see their current Roles, you can leave them all unchecked.
7. Check "Matched volunteers".
8. Click **Search** to see the list of volunteers based on the options you selected.

# Tax Help

Assignment   Coordinators   Profile   Description   **Volunteers**   Schedule   Rules

**Volunteers** Messages

15 Volunteers listed

**Include:**

All volunteers  
 These volunteers

---

**Status**

Active                       Applicant                       Inactive  
 LOA                                       Prospect

---

**Role**

Assigned                       Former                       Inactive  
 Preference                       Substitute                       Trainee

Matched volunteers

---

[Help](#)   Search   Set all Assignments like this

Tag	Volunteer	Role	New role	
<input type="checkbox"/>	<a href="#">Armstrong, Mary</a>	Assigned	Assigned	Delete
<input type="checkbox"/>	<a href="#">Bailey, George</a>	Matched		
<input type="checkbox"/>	<a href="#">Bailey, Victor</a>	Matched		
<input type="checkbox"/>	<a href="#">Becker, Anna</a>	Matched		
<input type="checkbox"/>	<a href="#">Cook, Chantel</a>	Matched		

The Role column will show either the volunteer's current Role in the Assignment (if you chose to see these in step 6) or the word "Matched". You can set a Role for an individual volunteer by choosing it from the New role drop-down list that appears on the same line as their name. When you make this selection, the new Role will be saved right away.

In addition to selecting Roles for volunteers that match your Assignment, you can also [tag \[pg:1529\]](#) all the volunteers on the list by clicking the **Tag these** button at the bottom of the Volunteers tab. Or you can send all the volunteers on the list an email or text message by clicking the **Messages** link near the top of the page.

### Find Assignments that match a volunteer

You can also find all of the Assignments that match a particular volunteer. To do this:

1. Choose Volunteers from the [menu \[pg:0215\]](#).
2. Use the alphabet links and search options to [find the volunteer you'd like \[pg:1982\]](#), and then click their name.
3. Go to the Service tab of his or her record
4. Click **Include matched assignments**. This will cause the system to display all Assignments this volunteer is matched to.
5. If you'd like to give the volunteer a Role in a matched Assignment, click the "Edit" link, select the appropriate Role from the dropdown list, and then click the **Save** button.

### Considerations for site-level access

If you use the [Site Level Access \[pg:0092\]](#) features in Volgistics, then a volunteer's Site(s) will also be considered when matching. Volunteers will only be considered a match if they are assigned to the Site that the Assignment appears under. For example, consider the following list of Assignments

#### Site A

[Add a new Place](#)

#### Place A

[Assignment A](#)

[Add a new assignment](#)

#### Site B

[Add a new Place](#)

#### Place B

[Assignment B](#)

[Add a new assignment](#)

In this example, if a volunteer is assigned to Site A and not Site B, they could be matched to Assignment 1, but not Assignment 2. Even if they meet the other criteria for Assignment 2, they're not assigned to the correct Site, and so won't be matched to it.

### Related help

[Help Topic 2047 \[pg:0895\]](#) - Assignment Tracking Ground Rules

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## Record Assignments Automatically

Help topic 2265

Added or revised 09-12-2013

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Volunteer Assignments can be recorded in two ways:

1. Assignments can be [manually added to the Assignments box \[pg:0193\]](#) on the Service tab in each volunteer's record, or
2. Assignments can be automatically added to a volunteer's record whenever a volunteer has service in an Assignment or is scheduled to serve in an Assignment.

This help topic provides information about the "Record assignments automatically" option.

The "Record assignments automatically" option can be found on the [Assignment Tracking Ground Rules \[pg:0895\]](#) page. If you are not already on this page, you can get there by choosing Setup from the [menu \[pg:0215\]](#), clicking on "Assignment tracking," and then clicking on the "Ground Rules" link.

Check this option if you want Volgistics to automatically maintain this list of Assignments for each volunteer. Do not check this option if you want to control which Assignments a volunteer has yourself by entering a volunteer's Assignments manually.

When this box is checked, Volgistics automatically inserts a volunteer Assignment record on the volunteer's Service tab every time you post service or schedule a volunteer for a new Assignment. Volgistics sets the [role \[ \]](#) for these new volunteer Assignment records to 'Assigned.'

When this box is not checked, Volgistics will not automatically add Assignment records for volunteers. In this case, [System Operators \[pg:0065\]](#) can make volunteer Assignments on the Service tab manually.

### **Make this retroactive**

Click the **Make this retroactive** button if you want Volgistics to apply automatic Assignments *retroactively*. This means that Volgistics will automatically insert a volunteer Assignment record on each volunteer's Service tab for every assignment for which the volunteer currently has service recorded, or is (or has been) scheduled; unless they already have the Assignment with the 'Assigned' role listed on their Service tab.

For example, if volunteer 'George Bailey' has no volunteer Assignments recorded on his service tab, but he has volunteer hours recorded in the 'Docent' Assignment, and he is scheduled for the 'Book cart' Assignment; these two Assignments will appear on his Service tab if you apply this feature retroactively.

Once you apply this feature retroactively, there is not an automatic way to remove any of the volunteer Assignment records which are added.

### **Related help**

[Help Topic 1185 \[pg:0193\]](#) - Assigning Volunteers to an Assignment

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## Award Ground Rules

Help topic 2286

Added or revised 10-19-2012

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You use the Award Ground Rules page to configure several underlying rules Volgistics will use for tracking volunteer recognition. If you're not already on the Award Ground Rules page, you can get there by selecting Setup from the [menu \[pg:0215\]](#), choosing "Awards," and then clicking the "Ground Rules" link.

### **Volunteers are eligible for awards if their Status is**

Use this section to control which volunteers you want to give volunteer recognition to based on their volunteer [Status \[pg:1832\]](#). Check the statuses you want to receive recognition.

If a volunteer's Status is any of those you check in this section and they meet the requirements for any of your awards, the award will appear on the volunteer's Checklist box indicating that the volunteer is eligible for the award. The Checklist box is located on the History tab of the volunteer's record.

If a volunteer's Status is any of those you *do not* check in this section, they will not be shown as eligible for any awards-even if they meet the award's criteria.

If you want your volunteer recognition program to just include "active" volunteers, check only the Active Status in this section.

If a volunteer's Status is not one of those checked in this section, and their Status is changed back to one that is (for example, if they are changed from "Inactive" back to "Active"), they will become eligible for any award for which they meet the criteria.

### **Sequential award rule**

Volunteer awards are often "sequential." For example, awards based on the number of hours served are often based on a sequence such as 100 hours, 500 hours, 1,000 hours, and so forth. When you have these kinds of awards, there are two different ways you can go about presenting them *in situations where volunteers have achieved more than one level since you last gave awards*.

One is to give *every* award level that a volunteer is eligible for, the other is to give only the *highest* level they are eligible for.

Here's an example: suppose you have awards for 100 hours, 500 hours, and so forth. Further suppose that volunteer George Bailey started volunteering sometime since you last presented awards and he has now served 650 hours. The next time you give awards, should George be presented with a 100 hour award and a 500 hours award (he meets the criteria for each of these), or only the 500 hour award (the highest award he's eligible for)?

#### Every level they have achieved

Choose this option if you want to present volunteers with every award, even if they are eligible for a higher level award. With this setting, George Bailey would receive both the 100 and the 500 hour award in the example above.

#### Only the highest level they have achieved

Choose this option if you want to present volunteers with just the highest level award they are eligible for. With this setting, George Bailey would receive just the 500 hour award in the example above.

This setting is simply a matter of which way you prefer to give awards. If you recently added volunteer records and are entering your volunteers' past awards, you can either enter all of your volunteers' past awards (if you want to keep their award history), or you can just enter their most recent award. If you enter only their most recent award, set the sequential award rule to *Only the highest level they have achieved*. Otherwise all the sequential awards will appear on the volunteer's History tab.

Please keep in mind that this setting affects all sequential awards you setup in Volgistics. So if you change this for entering past awards and want new volunteers to receive each award in a sequence, you will need to remember to do this yourself because the volunteer's History tab will not show lower level awards if more than one level is achieved.

### **Related help**

[Help Topic 3022 \[pg:1551\]](#) - Tracking Volunteer Recognition

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## **Award Setup**

Help topic 2287

Added or revised 10-03-2014

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Use the Award setup page to establish an award you want to track in Volgistics. If you're not already on the award setup page you can get there by selecting Setup from the [menu \[pg:0215\]](#), choosing "Awards," and clicking the "Add a new award" link or clicking on the name of an award you want to change.

### **Award name**

Enter the name of this award. Award names can be anything you'd like and up to 30 characters long. These are some examples:

- 100 Hour Award
- 2,000 Hour Award
- 5 Year Award
- Tribune Award of Excellence
- Outstanding Junior

### **Volunteers are not eligible automatically (you decide who receives this award)**

Choose this option if the award is one that is based on some subjective criteria. In other words, if the recipients of this award are selected by a committee, yourself, or some other group. An example of an award that might be given on the basis of subjective criteria is a volunteer of the year award. Such an award might be based on a variety of factors, not simply how many hours or years of service a volunteer has.

When you choose this option, Volgistics never shows volunteers to be eligible for this award automatically. Instead, you enter this award manually on the History tab for the volunteers you choose to receive it.

### **Volunteers are eligible for this award if they meet all of these service conditions...**

Choose this option for awards based only on measurable volunteer service, such as hours served or years of service. Examples of awards based on measurable volunteer service include hour awards (e.g. 100 hours, 500 hours, 1,000 hours, and so forth) and years of service awards (e.g. 1 year, 5 years, 10 years). You can also have awards based on multiple service accomplishments (e.g. at least 5 years *and* 1000 hours for example).

When you choose this option, Volgistics will automatically show which volunteers are eligible to receive this award in the Checklist box on the History tab of each volunteer's record.

If you choose this option, use the remaining settings on the page to set the rules that determine when volunteers should receive this award. For example, if an award is given to volunteers who have served at least 100 hours, you would set that rule in this section.

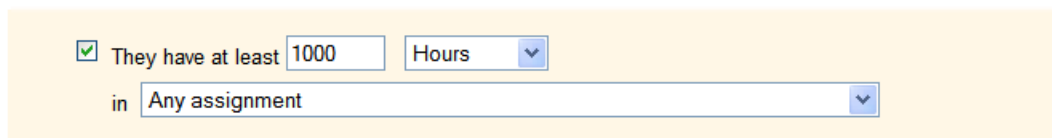
You can set up to five different rules that define who should receive this award, although most awards will probably have just one, or perhaps two rules. If you set more than one rule for a single award, a volunteer must meet **all** of the rules for the award before they will qualify for it. For example, if an award has these two conditions:

They have at least 1,000 hours in any assignment  
Their years of service are at least 5 years and 0 months

. . . then only the volunteers who have at least 1,000 hours and who also have at least five years of service will qualify for the award.

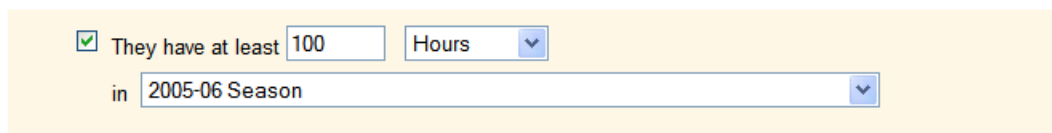
To set a condition for the award, put a checkmark next to the condition and then select the values you want the condition to have.

A condition based on the number of hours a volunteer has served would look like this:



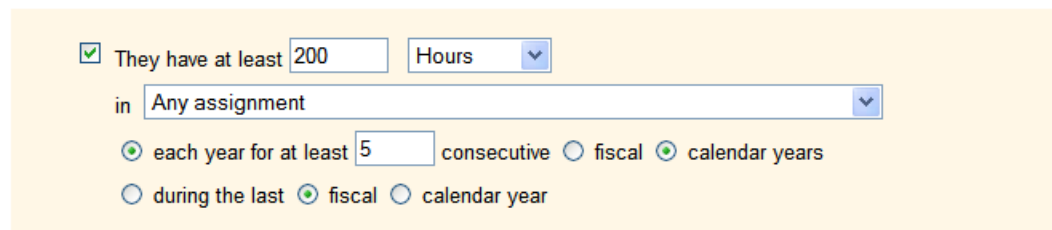
They have at least     
in

A condition that a volunteer must have served a certain number of hours in a specific assignment, or at a specific Site or Place, would look like this:



They have at least     
in

You can create sophisticated award conditions too. This is how you would set an award that is given only to volunteers who have served at least 200 hours a year, for at least five consecutive years.



They have at least     
in    
 each year for at least  consecutive  fiscal  calendar years  
 during the last  fiscal  calendar year

If you have an award based of length of service, notice that that there are two possible rules you can use:

At least  years and  months have passed since their first  date

Their years of service are at least  years and  months.

The difference between these two rules relates to the fact that a volunteer's length of service could be determined two different ways. One is to count the total number of years and months that have passed since the date a person first became an active volunteer-even if there were intervening months or years where the individual was not active. The other is to count the years and months since a person first became active, excluding any periods of time they were inactive.

Here's an example: suppose George Bailey started volunteering ten years ago today, and he has served continuously except for a two year period he was away. Does George have 10 years of service today, or eight?

Of course the answer is up to you. It simply depends on how you want your award to work.

If you want to base your "years of service" awards on the total number of years and months a volunteer has served, even if there are periods when the volunteer was inactive, use this rule:

At least  years and  months have passed since their first  date

If you want to base your "years of service" awards on the total number of years and months a volunteer has served, excluding any periods they were inactive, use this rule:

Their years of service are at least  years and  months.

**Base this award on volunteer service performed through. . .**

Next, choose the time frame for which volunteer service is to be counted for this award. This is often referred to as the "cut-off" date for an award.

The current date (all of their recorded service)

Select this option if the award should be based on service recorded in the volunteer's record as of today.

The end of the previous month

Select this option if the award should be based on service recorded in the volunteer's record as of the last day in the previous month. This is the best choice if you present this award on a monthly basis.



### The end of each year

Select this option if the award should be based on service recorded in the volunteer's record as of the end of a particular month each year. Use the dropdown list to choose the month. This is the best choice if you present this award on an annual basis.

Here's an example of how this selection works: if you select this option and choose "December," service recorded in a volunteer's record for dates on or before last December 31st will be counted, but service recorded for dates after last December will not. In other words, a volunteer must have met the award criteria as of the end of December in order to be eligible for the award.

### **Volunteers receive this award only if. . .**

If you present this award only to volunteers who have (or do not have) a certain Flag or Type in their record, use this section to specify what that is. For example, if you use the Type field (the Type field is on the Core tab in the volunteer record) to distinguish between "regular" and "intern" volunteers, and this award is presented only to "regular" volunteers, use this section to set that requirement. When you do this, only volunteers who have (or do not have) the Flag and/or Type you specify will be shown as eligible to receive this award when they meet the award's conditions.

#### Their Type is (is not)

Check this checkbox and choose *is* or *is not*, then choose a Type from the dropdown list to make this award so it will only apply to volunteers who have (or do not have if you choose *is not*) the Type you select.

#### Their Flag is (is not)

Check this checkbox and choose *is* or *is not*, then choose a Flag from the dropdown list to make this award so it will apply only to volunteers who have (or do not have if you choose *is not*) the Flag you select.

#### If their Kind is:

If you track both individual and [group \[pg:1909\]](#) volunteers, use this to specify the kinds of volunteers this award will apply to.

Select *Either individual or group* if you want the award to be given to both individuals and groups.

Select *Individuals only* if you want the award to only be given to individuals.

Select *Groups only* if you want the award to only be given to groups.

Keep in mind that group records (if you use them) represent groups of volunteers who you do not track individually. For this reason, there is not a way to queue or track awards for specific members of a group who serve under a group's record. If you want to track awards for group members individually, you can track those volunteers as individuals instead of tracking them collectively as a group.

If you setup an award that applies to groups, a group will be queued for the award when the group members collectively meet the award requirements. For example, if you create an award which is given after 100 hours of service, the group will be queued for the award if 50 members of the group each serve 2 hours.

### **Sequence**

Some awards are sequential, such as those based on 100, 500 and 1,000 hours of service. To make this award part of a sequence, choose the award it comes after.

For example, if you have awards for 100, 500, 1,000 (and so forth) hours, your 100 hour award would not come after any award (it's the first one), your 500 hour award would come after the 100 hour award, and the 1,000 hour award would come after the 500 hour award, and so on.

If this award is part of a sequence of awards, and it's not the first award in the sequence, use the dropdown list to choose the award it comes after. If the award that this award follows in a sequence has not been setup yet, set it up first and then return here to complete this step. It's best to setup awards that are sequential starting with the first award and then continuing with the next.

When you setup your awards to be sequential, you may also want to use the settings on the Award Ground Rules page to setup whether volunteers show as eligible for every award where they meet the requirements, or just the highest level award. [Help Topic 2286 \[pg:0908\]](#) explains how to do this.

### Related help

[Help Topic 3022 \[pg:1551\]](#) - Tracking Volunteer Recognition

[Help Topic 2286 \[pg:0908\]](#) - Award Ground Rules

[Help Topic 2531 \[pg:0913\]](#) - Deleting an Award

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## Deleting an Award

Help topic 2531

Added or revised 02-14-2012

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Use the Award setup page to delete an Award you track in Volgistics. If you're not already on the Award setup page you can get there by selecting Setup from the [menu \[pg:0215\]](#), choosing "Awards," and then clicking on the name of an Award you want to delete.

Only delete an Award if you are certain you want to completely remove the Award and all associated Award dates from the system. If you have found that you have inadvertently created duplicate Awards, you should [combine \[pg:0915\]](#) Awards instead of deleting one.

To delete the Award, scroll to the bottom of the Award setup page and click the **Delete this award** button. A warning stating that "This Award will be deleted, along with ALL of the volunteer Award dates for THIS Award" will appear. Click the **OK** button to proceed with the deletion.

### Important Things to Note before Deleting an Award

1. If you delete an Award, the corresponding Award date entries on the History tab in the record of any volunteer who previously received the Award will also be removed.
2. There is not a way to "undo" this kind of deletion. Once you delete an Award, you cannot recover information about this Award or any volunteer's Award dates for this Award.
3. It's okay to delete an Award if the dates when volunteers received it are no longer needed, or if the Award was created but never actually used.
4. There is not a way to preserve past Award date records without having a corresponding Award.

5. If you want to keep the past date history for an Award you no longer use, you should change the [Award's setup \[pg:0909\]](#) so none of your volunteers will be listed as eligible to receive it. Once you have made this change, do not delete the Award. It will still appear on the list of Awards in Setup and in the Tickler, but none of your volunteers will be listed as eligible to receive it.

To Set Up an Award so that None of Your Volunteers are Eligible to Receive it

1. Choose Setup from the menu.
  2. Click on Awards.
  3. Click on the name of the Award of interest.
  4. On the Award setup page, choose the option that states, "Volunteers are not eligible automatically (you decide who receives this award)."
  5. Scroll down and click the **Save** button.
- Now the Award dates for this Award will be maintained on the History tab of volunteer records, but no volunteers will appear to be eligible to receive it when you use the Tickler.

**What does the Dates box on the History tab look like when an Award is deleted?**

When a volunteer has received an Award, the Award appears in the Dates box on the History tab in his or her volunteer record.

In the following example, the "Volunteer of the Year" Award was presented on 12-17-2008:

<b>Dates</b>		Start date: 04-11-2001	Date entered: 08-08-2007			
		Stop date:				
	Event	Date	Expires	Notation	type of test	
Status	Active	04-11-2001				Edit
Award	Volunteer of the Year	12-17-2008		Presented		Edit Delete
Checklist	101807 example	10-15-2007	10-19-2007	Complete		Edit Delete
Checklist	Attends orientation	09-18-2007		Complete		Edit Delete

Now, after taking the steps to delete the "Volunteer of the Year" Award from this account, the same volunteer's Dates box will appear as seen below:

<b>Dates</b>		Start date: 04-11-2001	Date entered: 08-08-2007			
		Stop date:				
	Event	Date	Expires	Notation	type of test	
Status	Active	04-11-2001				Edit
Checklist	101807 example	10-15-2007	10-19-2007	Complete		Edit Delete
Checklist	Attends orientation	09-18-2007		Complete		Edit Delete

Note that there is no longer any record of this volunteer receiving the "Volunteer of the Year" Award.

#### Related help

[Help Topic 3022 \[pg:1551\]](#) - Tracking Volunteer Recognition

[Help Topic 2287 \[pg:0909\]](#) - Award Setup

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## Combining Awards

Help topic 2532

Added or revised 09-17-2013

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Use the Award setup page to combine one Award you track in Volgistics with another Award. If you're not already on an Award setup page, you can get there by selecting Setup from the [menu \[pg:0215\]](#), choosing "Awards," and then clicking on the name of an Award you want to combine with another.

Combining Awards is appropriate when you find that your account uses two Awards to track the same volunteer accomplishment. This can happen when [system operators \[pg:0065\]](#) inadvertently create more than one Award to track the same thing. In this case, even though they have all achieved the same thing, some volunteers may have Award dates for one Award, while others may have Award dates for another Award. Combining Awards allows you to remedy this situation.

To combine Awards, scroll to the "Combine" section of the Award setup page for the Award you want to combine with another Award. Find the "Combine this award with:" dropdown field, and select the Award with which this Award should be combined. Then click the **Combine** button. A warning stating that this Award will be combined with the other Award will appear. Click the **OK** button to proceed with combining the Awards.

#### What happens when you combine Awards?

When you are on the Award setup page for Award "A" and you choose to combine it with Award "B", Award "A" will be removed from the system. It will no longer appear on the list of Awards that is displayed when you choose Setup from the main menu and then click on Awards; it will not appear on the Tickler page; and it will not appear on the Awards list in the Checklist box on volunteers' History tabs. In addition, any volunteers who had a date on their History tab for Award "A" will now have this Award date for Award "B" instead.

The setup for Award "B" will remain the same, so any volunteers who were queued as eligible to receive Award "B" will still see Award "B" listed on their Awards list on the History tab.

Note that the system does not perform any check to determine whether the rules for Award "A" are the same as those for Award "B" (and the rules are not merged in any way), so the rules for Award "B" will prevail when the Awards are combined.

#### Related help

[Help Topic 3022 \[pg:1551\]](#) - Tracking Volunteer Recognition

[Help Topic 2287 \[pg:0909\]](#) - Award Setup

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## How to Setup Checklist Items

Help topic 2240

Added or revised 10-03-2014

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Use the [Checklist \[pg:0142\]](#) item setup page to create a new Checklist item, or to change the way an existing Checklist item is setup. If you're not already on the Checklist item page you can get there by selecting [Setup \[pg:0887\]](#) from the [menu \[pg:0215\]](#), choosing "Checklist" and then clicking the link for an existing Checklist item or the "Create a new Checklist item" link.

### Item Name

Enter the name of this Checklist item here. Examples of Checklist items names include 'Orientation', 'Application approved', 'Health screening,' 'Confidentiality statement,' 'Background check,' and so forth. Checklist item names may be up to 30 characters long.

### Must volunteers complete another checklist item before this item applies?

This option makes it possible for you setup Checklist items that apply only after volunteers complete a different Checklist item. For example, if you want new volunteers to complete an 'evaluation' 90 days after their initial orientation, you could setup a Checklist item called "90 day evaluation" that volunteers must complete 90 days after they complete a Checklist item called "Orientation." This prevents the '90 day evaluation' item from appearing on a volunteer's Checklist until 90 days after they complete the 'Orientation' item.

Select No if the Checklist item you're creating is not dependant upon volunteers completing a different Checklist item.

Select Yes if this Checklist item will not apply until sometime after volunteers perform a different Checklist item. If you select Yes, also enter the number of days that should pass before this item applies, and use the drop-down list to select the Checklist item that must be completed first.

### How often must volunteers complete this checklist item?

#### One time

Choose 'One time' if this item is something volunteers only do once. Examples of things that typically happen just once include having the application form approved, background checks completed, name badges issued, or attending an orientation.

Once a volunteer completes a 'one time' Checklist item, and you mark it complete in their record, the item will show 'completed' forever on their Checklist (unless you later delete the 'complete' entry for this item from the volunteer's History tab).

#### Periodic

Choose 'Periodic' if this item is something volunteers must repeat on a regular cycle. Examples of periodic Checklist items include health screenings volunteers must complete every 12 months and re-certifications required every two years.

If you choose 'periodic,' also select the number of days before the item is due again. For example, enter 365 days if it's due once a year.

Choose "from the date it last expired" if the next due date for the item should be based on the date it last expired. Choose "from the date it was last performed" if you want the item to be due again based on the date the volunteer last completed the item. The difference between these two options is only significant when volunteers do not complete the item as scheduled. For example, if a TB test is setup to expire once a year (every 365 days), but a volunteer does not repeat an Expired TB Test until two months after it was due, do you want that volunteer to be due again in just ten months (365 days *after it last expired*), or in another year (365 days *after it was last performed*)?

Once you mark a volunteer as having completed a 'periodic' Checklist item, the item will appear 'completed' on their Checklist, and the date the item will be due again will appear next to the item in parentheses. When that date arrives the item will appear as due again in the volunteer's Checklist.

#### Annual (same date for all volunteers)

Choose "Annual (same date for all volunteers)" if this item is something volunteers must do once a year, and it comes due in the same month or on the same day every year for all volunteers. Examples of things that would be annual (same date for all volunteers) might include membership payments due in January every year, or life safety re-certification performed in May every year.

If you choose Annual (same date for all volunteers), use the drop-down list to select the month and day the item comes due each year. Also specify if volunteers are allowed to complete the item early or not.

#### Annual (volunteer's birthday month)

Choose "Annual (volunteer's birthday month)" if this item is something volunteers must do once each year, and it comes due on a certain date in the month of the volunteer's birthday. An example of an item that might be due for volunteers in the month of their birthday is a health screening requirement.

If you choose Annual (volunteer's birthday month), use the drop-down list to select the date the items comes due in the month of the volunteer's birthday. For example, if you select this option and choose the 15th as the expiration date, a volunteer whose birthday is in June would be due for the screening on June 15, while a volunteer with a September birthday would not be due for it until September 15. Also specify if volunteers are allowed to complete the item early or not.

Note that if a volunteer does not have a date of birth recorded on their Profile tab but the item is setup to apply to them, the item will always appear to be "pending" for them, since there is no way for the system to know which month the item is truly due. In order to mark this type of item complete by checking the box next to it on the volunteer's History tab, you will need to first enter a date of birth for the volunteer. You can, however, make the item appear complete without entering a birth date if you add a Checklist date for the item in the Dates box on the History tab instead of marking the box next to the item in the Checklist box on the History tab.

#### Annual (start date anniversary)

Choose "Annual (start date anniversary)" if this item is something volunteers must do once each year, and you would like it to come due on the anniversary of the volunteer's [start date \[pg:1890\]](#) each year. Annual evaluations are an example of an item that might be due for volunteers on each anniversary of their start date.

If you create a Checklist item with this rule, and you mark the item complete for a volunteer who does not have a start date, their expiration date will be calculated as a one year from the current date.

#### Volunteers may/may not complete this item early

You can setup checklist items that must be renewed annually so that volunteers may (or may not) be marked as having completed the item early. When you setup an annual checklist item so volunteers **may** complete the item early, the item will appear on the checklist with a *Renewed* link, as shown here.

Evaluation (due again on 09-21-2010 **Renewed**)

Clicking this *Renewed* link will mark the item complete for another year. When volunteers are allowed to complete the item early you can click the *Renewed* link before the item's expiration date has actually arrived.

When you setup an annual checklist item so volunteers **may not** complete the item early, the item will not include the *Renewed* link, and the item cannot be marked completed again until the next expiration date has arrived. Once the expiration date has arrived, the item will automatically appear unchecked (meaning that it is now due), as shown here.

Evaluation

In this case, checking the checkbox will mark the item complete, as usual.

Which option to choose depends on your policy for a particular checklist item. If it is okay that volunteers complete the item annually before the next expiration date arrives, choose **may**. If you do not want to allow volunteers to complete the item again until a full year has past then choose **may not**.

Here's an example. Suppose you require an annual performance evaluation for volunteers, and you want to be certain that at least one full year has passed since the volunteer's last evaluation. In this case you would setup the checklist item so that volunteers **may not** complete the item early. On the other hand, you might have an annual health screening requirement that you would like volunteers to perform no less than once a year (you would like them to complete it before it expires each year). In this case you should setup the item so that volunteers **may** complete it early each year.

#### Upon expiration

Choose 'Upon expiration' for items that have arbitrary future expiration dates, such as driver's license or medical license expiration dates. This will enable you to record the date that this item next expires. The item will appear pending when that date arrives.

#### Every time

This option appears disabled unless this Checklist item applies only after a volunteer completes a different Checklist item (see "Must volunteers complete another checklist item before this item applies?" above).

Choose Every time if this Checklist item must be performed each time a volunteer completes the pre-requisite Checklist item.

## Which volunteers should this item apply to?

A Checklist item may apply to all volunteers, or just certain volunteers. For example, a Checklist item such as 'Orientation' might apply to all volunteers, however an item like 'Parental consent form' might only apply to volunteers under the age of 18. Use this section to specify which volunteers this Checklist item is required of.

If your new Checklist item applies to all volunteers, then all volunteers in your database (and any new volunteers you add) will automatically have this item listed on their Checklist.

If your new Checklist item applies only to certain volunteers, then only those volunteers will have this item listed in their Checklist. Volunteers for whom this item does not currently apply will not have this item listed on their Checklist. If, however, their record changes so that they meet the criteria for this item, it will automatically be added to their Checklist at that time. For example, if you create a Checklist item called 'Drivers license check' that applies only to volunteers who have an assignment that involves driving a vehicle, "Drivers license check" will not appear on the Checklist for a volunteer who is not assigned to one of these assignments. However if that volunteer is later assigned to an assignment that involves driving a vehicle, the "Drivers license check" will automatically appear on their Checklist as soon as they're assigned.

### If their status is:

Check the status a volunteer must have in order for this Checklist item to apply to them. This item will not appear on a volunteer's Checklist unless their status is one of those you choose here.

Generally, Checklist items would not need to apply to volunteers with a status of 'Inactive' or 'Prospect.'

### If their Kind is:

If you track both Individual and [Group \[pg:1909\]](#) volunteers, use this control to specify which kinds of volunteers this Checklist item will apply to.

Select *Either individual or group* if you want the Checklist item to apply to both individuals and groups.

Select *Individuals only* if you want the Checklist item to only apply to individuals.

Select *Groups only* if you want the Checklist item to only apply to groups.

Keep in mind that Group records (if you use them) represent groups of volunteers who you do not track individually. For this reason there is not a way to use Checklist items to track whether or not specific members of a group have completed a requirement. If you setup a Checklist item that applies to Groups, you can use the Checklist in each Group record to show whether or not the group contact completed that item. If you want to track Checklist items for individual members of a group, you will need to create individual volunteer records for the group members.

### If their Type is/is not

Check this option if you want this Checklist item to apply only to volunteers of (or not of) a specific Type.

The Type field appears in the Name box on the Core tab, and it is typically used for classifying volunteers by major program type, such as 'adult,' 'junior,' 'student,' 'regular,' 'occasional,' 'auxiliary,' and so forth.

If you check this option, choose "Is" if this Checklist item should apply only to volunteers who have a specific Type. Choose "Is not" if this Checklist item should apply only to volunteers who do not have a specific Type. Then choose the appropriate Type from the drop-down list.



For example, a Checklist item called 'Parental consent form' might apply only to volunteers if their Type is 'Junior.' In this case you would check 'Is' and then select 'Junior' from the drop-down list. In this example, 'Parental consent form' would not appear on a volunteer's Checklist unless their Type was 'Junior.'

#### If their Flag is/is not

Check this option if you want this Checklist item to apply only to volunteers who have (or do not have) a specific Flag in their record.

Flags appear in the Flag box on the Core tab for each volunteer. Flags are typically used to classify volunteers into different groups, such as 'board of directors,' 'donor,' 'sponsor,' 'day of caring,' 'red team,' and so forth.

If you check this option, choose 'Is' if this Checklist item should apply only to volunteers who have a specific Flag. Choose 'Is not' if this item should apply only to volunteers who do not have a specific Flag. Then choose the appropriate Flag from the drop-down list.

For example, a Checklist item called 'Membership payment' might apply only to volunteers who have a 'Member' Flag in their record. In this case you would select 'Is' and then choose 'Member' from the drop-down list. In this example, 'Membership payment' would not appear on a volunteer's Checklist unless they had the 'Member' Flag in their record and were due for a membership payment.

#### If they are in this Set

Choose this option, and select a [Set \[pg:0858\]](#) from the drop-down list if you want this Checklist item to apply only to the volunteers who are in the selected Set. For example, if you want a Checklist Item to apply only to volunteers who have served for more than 12 months you can create a Set that includes just these volunteers and then use that Set as the basis for the Checklist item.

The Set drop-down list you see here will not include any Sets that have a Set Rule based on "Their checklist." If you do not see a specific Set on this drop-down list it is because it includes a Rule based on the Checklist (Checklist criteria cannot include Sets that themselves reference the Checklist to prevent "circular references"). If you would like a particular Checklist item to apply only when another Checklist item has been completed, choose "yes" under "Must volunteers complete another checklist item before this item applies" at the top of the Checklist item setup page.

#### Those that have any assignment with:

Some Checklist items might only apply to volunteers who have a specific *kind* of volunteer assignment. For instance, a 'Drivers license check' might apply only to volunteers if they have an assignment that includes driving a vehicle; and a 'TB test' might apply only to volunteers who have an assignment that would involve patient contact.

You can use this section to indicate what kinds of assignments a volunteer must have in order for this item to apply. There are more detailed instructions on how to configure these Checklist items in [Making Checklist items apply only for certain assignments. \[pg:0921\]](#)

Skip this section if this item applies no matter what assignment(s) a volunteer has.

#### Those assigned to:

Some Checklist items might only apply to volunteers who have *one specific assignment*. For instance, an item called 'Counselor certification checked' might only apply to volunteers who have the assignment 'Patient family counselor.'

If this item should only apply to volunteers who have one specific assignment, select that assignment from the drop-down list, and then check the [role\(s\) \[pg:0103\]](#) volunteers must have in the selected assignment before this item will apply.

Skip this section if this item applies no matter what assignment(s) a volunteer has.

### Email Reminders

If volunteers must complete this Checklist item on a "periodic," "annual (same date for all volunteers)" or "annual (volunteer's birthday month)" basis, Volgistics can automatically send reminder messages by email whenever a volunteer needs to renew this item. If you want volunteers to receive automatic email reminders when this checklist item must be repeated, or when it still needs to be performed, use the "Email Reminders" box to setup the email timing and wording you want to use.

You can choose to send up to three reminders for each Checklist item. For example, you might choose to send one reminder 30 days before it expires; a second reminder seven days before it expires, and a final reminder one day after it expires.

Note that if you choose to send reminders for "annual (volunteer's birthday month)" items, the volunteer will need to have a date of birth recorded on their Profile tab. If they do not have a date of birth recorded, the system cannot know when to send the reminder. The only exception is if a Checklist date containing an expiration date for the item has been added to the Dates box on the History tab (as described above, under "Annual [volunteer's birthday month]"). In this case, a reminder email can be generated without a date of birth entry; since an expiration date for the item has been entered, the system can determine when a reminder should be sent.

Click the **Save** button to save your Checklist item setup, or the **Cancel** button to close the page without saving your changes.

### **Related help**

[Help Topic 2238 \[pg:0142\]](#) - Checklist

[Help Topic 2245 \[pg:0148\]](#) - Finding the Volunteers who Need to Complete a Checklist Item

[Help Topic 2244 \[pg:0146\]](#) - Viewing a Volunteer's Checklist

[Help Topic 2243 \[pg:0144\]](#) - Marking Checklist Items Complete

[Help Topic 2242 \[pg:0921\]](#) - Making Checklist Items Apply Only for Certain Assignments

[Help Topic 2009 \[pg:0141\]](#) - How Volgistics Calculates Checklist Item Expiration Dates

[Help Topic 8009 \[pg:0608\]](#) - Volunteer Checklist Report (stock)

[Help Topic 2530 \[pg:0925\]](#) - Deleting a Checklist Item

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## **Making Checklist Items Apply Only for Certain Assignments**

Help topic 2242

Added or revised 03-03-2011

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If you use the Volgistics [Checklist \[pg:0142\]](#) features, you may have Checklist items that only apply to volunteers who have certain *kinds* of volunteer assignments. For instance, a 'Drivers license check' might apply only to volunteers if they have an assignment that includes driving a vehicle; and a 'TB test' might apply only to volunteers who have an assignment that would involve patient contact.

This topic explains how to configure Checklist items so they will apply only to volunteers who have a specific kind of volunteer assignment. It follows the example of a 'TB test' Checklist item in a hospital setting, however you can create Checklist items this way for any kind of volunteer requirement based on volunteers having a certain type of assignment.

In this example there are some volunteer assignments that involve contact with patients, and others that do not. A 'book cart' volunteer, for instance, might come into contact with patients, whereas a community health instructor who serves off site might not. Rather than require that every volunteer have a TB Test annually, an organization might choose to require annual TB Tests only of volunteers who serve in one or more of the assignments that could involve patient contact.

### Designate the assignments the Checklist item should apply to

Start by designating the volunteer assignments your Checklist item will apply to. You can use any of the 'spare' fields on the Assignment tab for this purpose. In this example, we use a checkbox on the Assignment tab to indicate which assignments have patient contact, as shown here:

## Book Cart

The screenshot shows a web form for an assignment named 'Book Cart'. The form has several tabs: 'Assignment', 'Coordinators', 'Profile', 'Description', 'Volunteers', and 'Schedule'. The 'Assignment' tab is active. Below the tabs are buttons for 'Save', 'Cancel', and 'Combine, move or delete'. The form is divided into sections: 'Name', 'Address', and 'Detail'. In the 'Name' section, the site is 'Sample Agency Name', the place is 'Volunteer Services', and the assignment is 'Book Cart'. There are dropdown menus for 'Impact' and 'Status' (set to 'Active'), and three checked checkboxes: 'Advertise', 'Sign-in option', and 'Schedule reminders'. The 'Address' section has fields for Street 1, 2, 3, City, State, Zip, Home, Work, Cell, Fax, and Pager, each with an 'Ok to call' checkbox. The 'Detail' section has a 'Minimum age' field set to '18' and a 'Patient contact' checkbox, which is circled in red.

If you do not yet have a field established on the Assignment tab for this purpose, you can define one like this:

1. Choose Setup from the [menu \[pg:0215\]](#).
2. Select "Field Options."
3. Select the "Assignment tab."
4. Click the link for any of the unused 'Spare' fields. If you'd like to use a checkbox field for this purpose (as we do in this example), click on the any 'Spare checkbox' field you're not already using.

[Spare dropdown 1 \(Hidden\)](#)  
[Spare dropdown 2 \(Hidden\)](#)  
[Spare dropdown 3 \(Hidden\)](#)  
[Spare dropdown 4 \(Hidden\)](#)  
[Spare dropdown 5 \(Hidden\)](#)  
[Spare dropdown 6 \(Hidden\)](#)

[Spare field 1 \(Hidden\)](#)  
[Spare field 2 \(Hidden\)](#)  
[Spare field 3 \(Hidden\)](#)  
[Spare field 4 \(Hidden\)](#)  
[Spare field 5 \(Hidden\)](#)  
[Spare field 6 \(Hidden\)](#)

[Spare checkbox 1 \(Hidden\)](#)  
[Spare checkbox 2 \(Hidden\)](#)  
[Spare checkbox 3 \(Hidden\)](#)  
[Spare checkbox 4 \(Hidden\)](#)  
[Spare checkbox 5 \(Hidden\)](#)  
[Spare checkbox 6 \(Hidden\)](#)

5. On the Field properties page, enter a Field Name (such as 'Patient contact'), and then set the 'Hidden' value to 'No.'

6. If you want this checkbox to be checked by default each time you add a new assignment to your database, check the "Default entry" checkbox.

7. Click the **Save** button.

You now have a field on the Assignment tab you can use to indicate whether or not a given volunteer assignment involves patient contact.

Now you're ready to mark your existing assignment records. To do this:

1. Choose Assignments from the [menu \[pg:0215\]](#).

2. Click on your first assignment record.

3. If this assignment could include patient contact, check the 'Patient contact' field and then click the **Save** button.

4. Repeat steps 2 and 3 for each of your existing volunteer assignments.

If you later add new assignments to your database, be sure to check or uncheck the 'Patient contact' checkbox as appropriate.

### Setup your Checklist item

Now you can setup your Checklist item (a 'TB Test' in this example). To setup the new Checklist item:

1. Choose Setup from the [menu \[pg:0215\]](#).
2. Select "Checklist."
3. Click the "Add a new checklist item" link.
4. Complete the Checklist item page as appropriate (see [Checklist Item \[pg:0916\]](#)).
5. Under "Which volunteers should this item apply to?" make the following selections:
  - Under "If their Status is," select the volunteer statuses volunteers must have in order for this Checklist item to apply to them. For instance, un-check 'Inactive' if Inactive volunteers need not complete this requirement.
  - Under "Those that have any assignment with:" select "Patient Contact" (or whatever kind of assignment this item applies to, depending on your actual requirements).
  - Under "If their Role in the assignment is..." choose the assignment [roles \[pg:0103\]](#) this Checklist item should apply to. For instance, check only the 'Assigned' checkbox if this item should apply only to volunteers whose role in any of the 'Patient Contact' assignments is 'Assigned.'
6. Click the **Save** button to save your changes.

Your Checklist item is now setup.

### Test your Checklist item

It's a good idea to test your Checklist item to be sure it's configured the way you want it.

One way to test this is to locate the records for several volunteers you expect the Checklist item will apply to, and several you do not expect it to apply to. In each of these volunteer records, visit the History tab to verify that the item does or does not appear as expected.

If the item does not appear on the Checklist as you expect (or if it appears when you do not expect it to), double check your Checklist item setup on the Setup page, and also check the selected volunteer records to be sure they have an assignment that meets your criteria for the item.

If the item does not appear on a selected volunteer's Checklist, visit the Service tab in their record and examine their assignments. In order for the item to appear for a volunteer, the Service box on their Service tab must include at least one of the assignments your checklist item applies to, and their role in that assignment must be one of the roles you check on the Checklist item setup page.

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## Deleting a Checklist Item

Help topic 2530

Added or revised 02-14-2012

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Use the Checklist item setup page to delete a Checklist item you track in Volgistics. If you're not already on the Checklist item setup page you can get there by selecting Setup from the [menu \[pg:0215\]](#), choosing "Checklist," and then clicking on the name of a Checklist item you want to delete.

Only delete a Checklist item if you are certain you want to completely remove the item and all associated Checklist dates from the system. If you have found that you have inadvertently created duplicate Checklist items, you should [combine \[pg:0926\]](#) Checklist items instead of deleting one.

To delete the item, scroll to the bottom of the Checklist item setup page and click the **Delete this item** button. A warning stating that "This Checklist item will be deleted, along with ALL of the volunteer Checklist date records for THIS item" will appear. Click the **OK** button to proceed with the deletion.

### **Important Things to Note before Deleting a Checklist Item**

1. If you delete an entire Checklist item, the corresponding Checklist date entries on the History tab in the record of any volunteer who previously completed the item will also be removed.
2. There is not a way to "undo" this kind of deletion. Once you delete a Checklist item, you cannot recover information about this item or any volunteer's Checklist dates for this item.
3. It's okay to delete a Checklist item if the dates when volunteers completed it are no longer needed, or if the item was created but never actually used.
4. There is not a way to preserve past Checklist date records without having a corresponding Checklist item.
5. If you want to keep the past date history for a Checklist item you no longer use, you should change the [Checklist item's setup \[pg:0916\]](#) so it no longer applies to any volunteers. Once you have made this change, do not delete the item. It will still appear on the Checklist in the Setup page and in the Tickler, but it will not apply to any volunteers.

### **To Make a Checklist Item Apply to None of Your Volunteers**

1. Choose Setup from the menu.
2. Click on Checklist.
3. Click on the name of the item of interest.
4. Under "How often must volunteers complete this checklist item?," select Never.
5. Click the Save button to save your changes.

### **What does the Dates box on the History tab look like when a Checklist item is deleted?**

When a Checklist item applies to a volunteer and that volunteer has completed the required item, the item appears in the Dates box on the History tab in his or her volunteer record.

In the following example, the "Application approved" Checklist item was completed on 08-08-2007:

<b>Dates</b>		Start date: 09-12-2008	Date entered: 09-12-2008				
		Stop date:					
	Event	Date	Expires	Notation	type of test		
Status	Active	09-12-2008				Edit	
Checklist	Application approved	08-08-2007		Complete		Edit	Delete
Checklist	Initial interview	07-01-1989		Complete		Edit	Delete
Checklist	Attends orientation	07-01-1989		Complete		Edit	Delete
Class	CPR	06-01-2008	09-01-2008	Completed		Edit	Delete

Now, after taking the steps to delete the "Application approved" Checklist item from this account, the same volunteer's Dates box will appear as seen below:

<b>Dates</b>		Start date: 09-12-2008	Date entered: 09-12-2008				
		Stop date:					
	Event	Date	Expires	Notation	type of test		
Status	Active	09-12-2008				Edit	
Checklist	Initial interview	07-01-1989		Complete		Edit	Delete
Checklist	Attends orientation	07-01-1989		Complete		Edit	Delete
Class	CPR	06-01-2008	09-01-2008	Completed		Edit	Delete

Note that there is no longer any record of this volunteer completing the "Application approved" Checklist item.

### Related help

[Help Topic 2238 \[pg:0142\]](#) - Checklist

[Help Topic 2240 \[pg:0916\]](#) - How to Setup Checklist Items

[Help Topic 2246 \[pg:1610\]](#) - Why a Checklist Item May Not Apply to Every Volunteer

[Help Topic 2244 \[pg:0146\]](#) - Viewing a Volunteer's Checklist

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## Combining Checklist Items

Help topic 2533

Added or revised 01-05-2012

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Use the Checklist item setup page to combine one Checklist item you track in Volgistics with another Checklist item. If you're not already on the Checklist item setup page you can get there by selecting Setup from the [menu \[pg:0215\]](#), choosing "Checklist," and then clicking on the name of a Checklist item you want to combine with another item.

Combining Checklist items is appropriate when you find that your account uses two items to track the same volunteer requirement. This can happen when system operators inadvertently create more than one Checklist item to track the same thing. In this case, even though they have all completed the same task, some volunteers may have Checklist dates for one item, while others may have Checklist dates for another Checklist item. Combining items allows you to remedy this situation.

To combine items, scroll to the "Combine" section of the Checklist item setup page. Find the "Combine this item with:" dropdown field, and select the item with which this item should be combined. Then click the **Combine** button. A warning stating that this Checklist item will be combined with the other item will appear. Click the **OK** button to proceed with combining the items.

#### **Q. What happens when you combine Checklist Items?**

**A.** When you are on the Checklist item setup page for item "A" and you choose to combine it with item "B": Item "A" will be removed from the system. It will no longer appear on the list of Checklist items that is displayed when you choose Setup from the main menu and then click on Checklist; it will not appear on the Tickler page, and it will not appear in the Checklist box on volunteers' History tabs. In addition, any volunteers who had a date on their History tab for Checklist item "A" will now have this Checklist date for item "B" instead.

The setup for item "B" will remain the same, so any volunteers who were due to complete item "B" will still see item "B" listed on their Checklist.

Note that the system does not perform any check to determine whether the rules for Checklist item "A" are the same as those for item "B" (and the rules are not merged in any way), so the rules for item "B" will prevail when the Checklist items are combined.

#### **Related help**

[Help Topic 2238 \[pg:0142\]](#) - Checklist

[Help Topic 2240 \[pg:0916\]](#) - How to Setup Checklist Items

[Help Topic 2246 \[pg:1610\]](#) - Why a Checklist Item May Not Apply to Every Volunteer

[Help Topic 2244 \[pg:0146\]](#) - Viewing a Volunteer's Checklist



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## How can I reset a message preference for all volunteers?

Help topic 1152

Added or revised 12-08-2016

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While we urge you to respect your volunteers' and [Coordinators' \[pg:0163\]](#) choices for [message preferences \[pg:0381\]](#), there may be times when you want to change their selections. You can do this from the Profile tab for a single record, or you can follow the steps here if you need to reset the [message type \[pg:1321\]](#) selections for multiple records that are currently in your database.

One instance where you may need to do this is if you are changing an existing message type from one thing to another. In this case, you will need to reset all of the existing volunteer preferences for the type. For example, you may have a message type you no longer use called "Weekend event announcements," which you want to replace with a completely different type called "Emergency volunteer appeals." To do this, you would reset all of your volunteers' preferences for this message type. If you did not reset the preferences in this example, the selections volunteers made previously for "Weekend event announcements" would continue to appear for the new "Emergency volunteer appeals" type.

To get to the page where their messages preferences can be reset:

1. Select [Setup \[pg:0887\]](#) from the menu.
2. Expand the *Messages* link.
3. Select *Message types*.

The Reset option pictured below allows you to make changes to the message preferences for all records currently in your database:

Type:

Default  (for new volunteers and coordinators)

Default  (as shown when opting in to text messaging in VicNet)

Reset  to

Type:

Under the name for the message type, the next two lines allow you to set the default selections for your volunteers and coordinators. In the "Reset" line, the first dropdown will have selections for *everybody*, *those opted in to text messaging*, and *those not opted in to text messaging*. You can use these options to select which records the message preferences will be changed for. **Please note:** The second dropdown will only have selections for *email* and *none*. This is because regulations do not allow you to opt someone in to receive a message by text. This is due to the possibility that a recipient could be charged a fee by their carrier when a text is received. Once you've made your selections, click the **Update** button.

For accounts without text messaging, the page will be slightly different, as shown here:

---

Type:

Default  (for new volunteers and coordinators)

Reset  to

---

As above, the first line under the name for the message type will allow you to set a default selection for new volunteer and coordinator records. In the "Reset" line, the first dropdown will only show *everybody*, and the second will show *email* and *none*. If you select *email* from the dropdown and click the **Update** button, all records will have the message type selected for the Email Preference field. If you select *none* from the dropdown and click the **Update** button, the message type will be un-checked on all of the records for the Email Preference field.

### Related help

[Help Topic 1023 \[pg:1321\]](#) - Message Types

[Help Topic 1068 \[pg:1327\]](#) - Volunteer Message Preferences

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## Message Ground Rules Setup Page

Help topic 1200

Added or revised 06-14-2016

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You use the Message Ground Rules setup page to configure default email properties for email you send through Volgistics, as well as enable or disable text messaging for your account. To get to the Message Ground Rules setup page, choose [Setup \[pg:0887\]](#) from the [menu \[pg:0215\]](#), click on Messages, and then choose Ground Rules.

### Automatic email

#### Volunteer reply-to address

Enter the email address you want to appear as the "reply-to" address on email messages you choose to have sent automatically. This will be the email address that email will go to if a volunteer recipient clicks the "Reply" button in his or her email program to reply to an automatic email message he or she has received.

If you have a general email address for your volunteer program (such as "volunteer@youragency.org") this is typically a good email address to use for this purpose, however you can enter any valid email address you want replies from volunteers to go to--with the exceptions noted below. You must enter a valid email address in this field. This field cannot be left blank.

**Please note** that some Internet Service Providers (ISP's) and Email Service Providers (ESP's) have started to block email messages when certain email domains are used as the reply-to address. At this point, only "@yahoo.com" and "@aol.com" email addresses are affected so these should not be used as your reply-to address if possible. Other general domains (such as "@gmail.com," "@hotmail.com," etc.) may follow so if possible we recommend using an email address with a domain specific to your organization as your reply-to address.

If you must use an AOL or Yahoo email address, you will need to change your *From address* setting to use **VolunteerMail@volgistics.com**. There is more information on this in the *From address* section below.

Automatic email to volunteers can include:

[Monthly schedule reminders \[pg:1399\]](#)

[Daily schedule reminders \[pg:1402\]](#)

[Checklist item \[pg:0142\]](#) expiration reminders

- Requests for forgotten [VicNet passwords \[pg:1699\]](#)

You choose which kinds of automatic email volunteers receive on other Setup pages.

#### Coordinator reply-to address

Enter the email address you want to appear as the "reply-to" address on email messages you choose to have sent to [Coordinators \[pg:0163\]](#) automatically. This will be the email address that email will go to if a Coordinator recipient clicks the "Reply" button in his or her email program to reply to an automatic email message he or she has received.

You can enter any valid email address you want replies from Coordinators to go to--with the exceptions noted in the *Please note* box above. This can be same email address you use for your *Volunteer reply-to address*, or it can be a different email address if you want email from Coordinators to be sent to a different email address than email from volunteers.

You must enter a valid email address in this field. This field cannot be left blank.

Automatic email to Coordinators can include:

[Monthly schedule reminders \[pg:1400\]](#)

[Daily schedule reminders \[pg:1403\]](#)

- Requests for forgotten [VicNet passwords \[pg:1699\]](#)

You choose which kinds of automatic email Coordinators receive on other Setup pages.

#### Email signature block

Optionally enter the signature block you want to appear at the bottom of email messages sent automatically by Volgistics. A signature block typically includes the sender's name, title, and contact information.

#### **HTML email default style**

Choose the font, font size, and font color you would like the text in your email messages to normally use.

##### Font

Choose the default font for your HTML formatted messages. You can choose Arial, Comic sans ms, Courier new, Georgia, Lucida sans, Tahoma, Times new roman, Trebuchet ms, and Verdana. The Default is the Arial font.

##### Font size

Choose the default font size for you HTML formatted messages. You can choose a font size of 8, 9, 10, 11, 12, 13, 16, 18, 20, 22, 24, 26, 28, 36, 48, or 72. The default is font size of 12.

##### Font color

You can choose a default font size for your HTML formatted messages. You an choose one of 40 preset colors. The default is Black.

## Sample

The sample section will show you the results of any changes you make to the Font, Font size, and Font color settings above. For example if you choose the Georgia font, a font size of 18, and a font color of red then the Words "Sample message text" will reflect those choices under the Sample section.

## **Closing message**

Many organizations include a standard message at the bottom of all of the email messages they send. Such a message might include a statement of the organization's mission; or a confidentiality or privacy policy.

If you would like email you send through Volgistics to include such a message, enter (or paste) it here. This message will automatically appear near the bottom of all email you send through Volgistics, including messages sent to volunteers and Coordinators by System Operators as well as automatic email sent by the system.

## **Email Authentication**

In order to help insure email delivery, Volgistics uses the Sender ID method of email authentication. With Sender ID, the mail your organization sends to volunteers through Volgistics can be verified more accurately by recipient mail systems, often bypassing spam filters and giving your email a better chance of reaching all volunteer recipients.

You can choose to let Volgistics handle Sender ID for you, in which case there's nothing more you need to do for email authentication to happen; or – if your organization has its own Internet domain – you can add volgistics.com to your domain's authorized email senders to provide Sender ID authentication yourself.

With either option, you still send email through Volgistics the exact same way, and email is still delivered by Volgistics mail servers.

Your selection here controls Sender ID email authentication for all of the email you send through Volgistics, including automatic email such as checklist and schedule reminders.

[Help topic 1116 \[pg:0311\]](#) - Sender ID explains more about these options.

## **From address**

An email domain is the portion of the email address after the at (@) sign. For example, if your organization's name is *Volunteer Agency* your email address may end with a domain like *@VolunteerAgency.org*.

In some cases, using a *from* email address with your organization's domain when you send email messages can cause the messages to fail. This is because the messages are blocked by your organization's network to prevent spamming. Also, as noted in the warning box above, using a reply-to address with a domain of AOL.com or Yahoo.com can cause messages to fail due to policies put in place by internet and email service providers.

To help get messages through in these cases, the Volgistics system can be configured to use a *from* email address that is the same as the [reply-to \[pg:0398\]](#) address for the type of message being sent, or it can be configured to use a *from* address of **VolunteerMail@volgistics.com**.

If your messages are not being delivered, we recommend using the *Use VolunteerMail@volgistics.com* setting. This will help the messages get through any blocks your organization may have, and it will bypass the AOL and Yahoo restrictions put in place by internet and email service providers.

You should also make sure volunteers and [Coordinators \[pg:0163\]](#) have their email accounts setup so that messages from VolunteerMail@volgistics.com are on the safe sender list. Some refer to this as "white-listing." You can find more information on how volunteers and Coordinators can white-list the Volgistics email addresses in [help topic 2046 \[pg:0366\]](#).

### **Opt-out message**

All email sent through Volgistics includes an [opt-out message \[pg:0381\]](#) for proper email etiquette. Use this section to choose the opt-out message terminology you prefer. There is not a way to omit the opt-out message, for the reasons provided in [help Topic 2101 \[pg:0384\]](#) – "Why It Is Important to Provide Message Opt Out Features."

### **Text Messaging**

This section of the page is used to [enable \[pg:0321\]](#) or [disable \[pg:0342\]](#) text messaging for your account. If you are not a [Volgistics Administrator \[pg:0052\]](#) for your account, or if your account does not include the [VicNet \[pg:1724\]](#) module, the options in this section will be disabled.

### **Text Message Opt-in Email**

If your account does not have [text messaging enabled \[pg:0321\]](#), you will not see this section. This section is designed to assist organizations in letting volunteers and [Coordinators \[pg:0163\]](#) know that text messaging is available. You can edit the content of the email message that is sent, as well as send the message to all Coordinator records in your account. To send the message to all of your Coordinators, click the **Send to all coordinators** button at the bottom of the page.

To send the message to volunteers, you will [tag the records \[pg:1538\]](#) you want to send the message to. Then select Tags from the menu and press the **Go** button beside the option to send the opt-in message. You can learn more about this in the [Send the text messaging opt-in email to the tagged records \[\\_\\_\\_\\_\\_\]](#) section of help topic 2137.

### **Related help**

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## Tab Rights Page

Help topic 1070

Added or revised 03-31-2017

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You can control which [tabs \[pg:1849\]](#) Volgistics [System Operators \[pg:0065\]](#) see in your volunteer records using the Tab Rights page for a selected tab. If you're not already on the Tab Rights page you can get there by:

1. Select [Setup \[pg:0887\]](#) from the [menu \[pg:0215\]](#).
2. Choose *Field Options*.
3. Select the tab you want to change the rights for. You can set tab rights for the Profile, Service, Schedule, History, Contacts, Notes, Vic, and Docs tabs. There is not a way to set tab rights for the [Core tab \[pg:1868\]](#) because it contains essential information for the volunteer's record such as their first and last name. If you want to set tab rights for the Docs tab, please see [help topic 2553 \[pg:1319\]](#).

4. Click the *Tab Rights* link to setup access to the tab.

You control tab rights based on the operator's *user level*. There are three *user levels* in Volgistics:

- Volgistics Administrators
- Power Users
- Basic Users

Every Volgistics System Operator has one of these three *user levels*. You can determine or change a System Operator's user level by:

1. Select [Setup \[pg:0887\]](#) from the menu.
2. Expand the *System Operators* link.
3. Select an operator's name.
4. View or change the *User level* dropdown. See [help topic 1011 \[pg:1895\]](#) if you need more assistance.
5. Click the **Save** button if a change was made in step 4.

Volgistics Administrators can:

Check "See this tab" if you want Volgistics System Operators whose user level is *Volgistics Administrator* to be able to use the selected tab in your volunteer records. Un-check "See this tab" if you do not want Volgistics System Operators whose user level is *Volgistics Administrator* to be able to use the selected tab.

Power users can:

Check "See this tab" if you want Volgistics System Operators whose user level is *Power User* to be able to use the selected tab in your volunteer records. Un-check "See this tab" if you do not want Volgistics System Operators whose user level is *Power User* to be able to use the selected tab.

Basic users can:

Check "See this tab" if you want Volgistics System Operators whose user level is *Basic User* to be able to use the selected tab in your volunteer records. Un-check "See this tab" if you do not want Volgistics System Operators whose user level is *Basic User* to be able to use the selected tab.

Click the **Save** button to save your changes, or the **Cancel** button to close without saving your changes.

## More Help

Note that in addition to customizing rights for tabs in Volgistics, you can also control access to the individual fields on the tabs. This is useful when a specific field on a tab should be hidden from System Operators of a certain user level, but there is no reason to restrict their access to the entire tab. You can [customize a field \[pg:0957\]](#) to determine whether it is "View and change," "View only" or "Hidden" to System Operators based on their user level.

You can find more information on configuring operator rights, plus examples of how these changes will appear for operators, in [help topic 2028 \[pg:0053\]](#)

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## Creating Assignment Clusters

Help topic 1114

Added or revised 10-04-2016

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Assignment clusters provide a way for you to group together assignments that have something in common, even when the assignments are located under different Sites and Places. Once you create an assignment cluster, you can use Sets to find all of the volunteers who serve in a particular assignment cluster; and print service reports organized by assignment cluster (with service totals and volunteer counts for each assignment cluster).

Generally, organizations would create assignment clusters only when they would be needed for specialized reporting requirements. If your organization does not have any of these specialized reporting requirements you probably do not need to create assignment clusters.

These are two examples of situations where assignment clusters might be required.

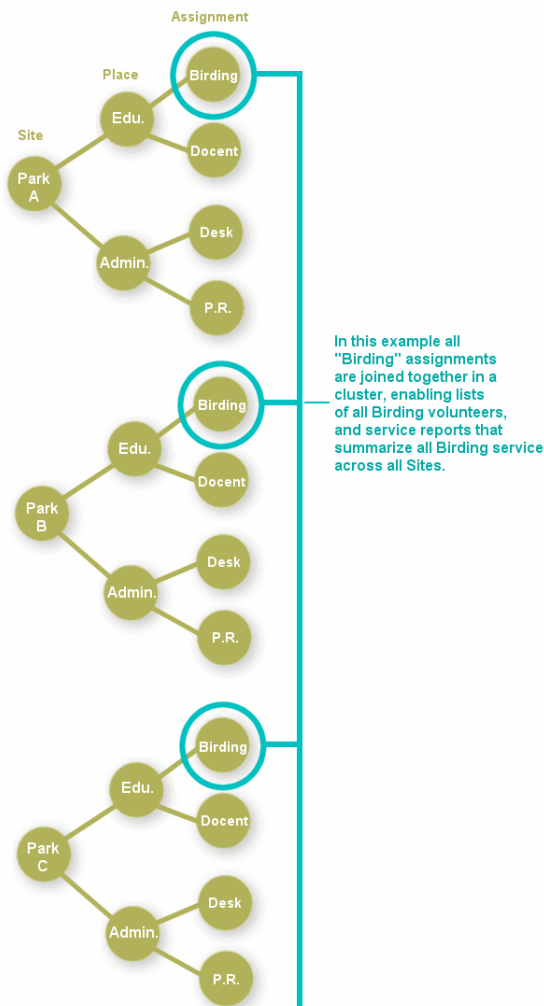
### Example 1

In some organizations the same Assignment is performed at multiple Places, under multiple Sites. In this situation an organization may want to report service for all volunteers doing the same job at any 'Place.' Consider the following example:

A Parks Department manages 60 parks in a region. At each park, there is an "Environmental Education" unit. "Birding" is a volunteer Assignment in each "Environmental Education" unit, at each park. In this example, each park should be setup as a Site; "Environmental Education" should be tracked as a Place under each Site (park), and "Birding" should be tracked as an Assignment under the "Environmental Education" Place under each Site (park).

This results in 60 Sites, 60 "Environmental Education" Places and 60 "Birding" Assignments. The following question arises: How can a volunteer manager report hours for all volunteers serving in "Birding" at any of the Sites (parks)?

The Cluster field on the Assignment record's Assignment tab provides a way to group distinct Assignments together. Once Assignment records share a Cluster field value (Assignment name), they are considered to be in the same Assignment cluster. System operators can create a Set rule based on Assignments in a chosen cluster, and reports can reflect volunteers serving in the same Assignment at various Places.

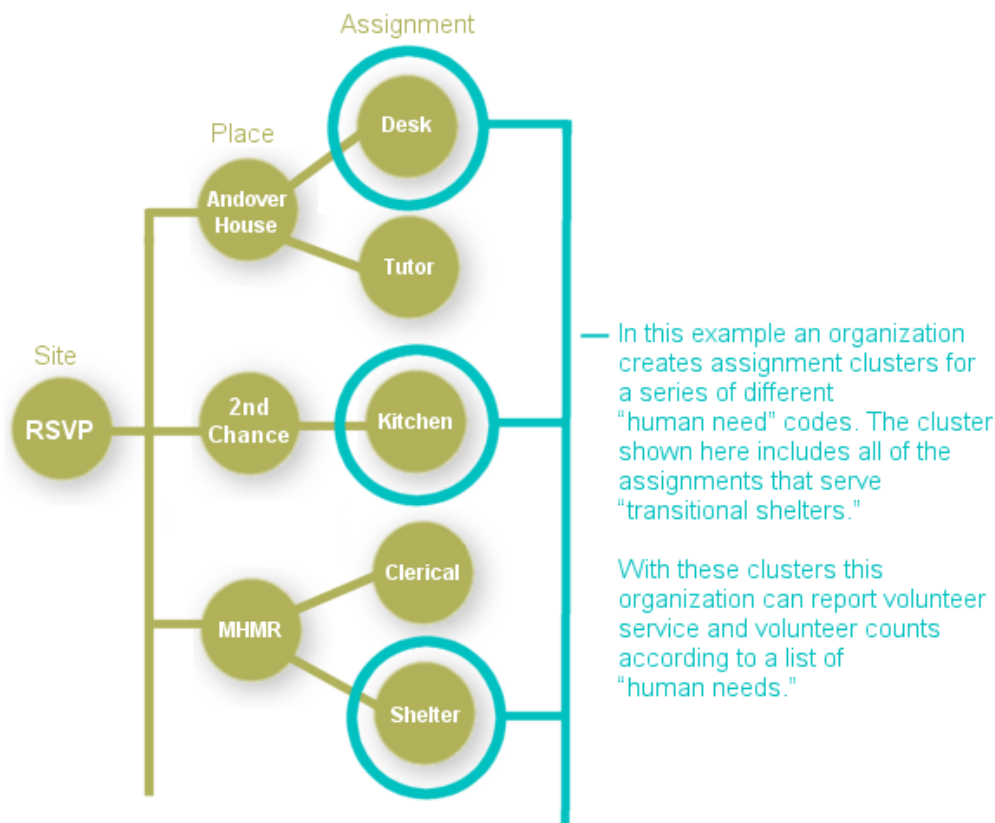


## Example 2

Some organizations – such as those which receive certain types of federal funding – must report volunteer service according to kind of community service performed. In this situation an organization can create an assignment cluster for each different kind of community service or 'human need,' and then organize their assignments into these clusters for reporting purposes.

For example, a Retired Senior Volunteer Program may be required to report the number of volunteer hours served (or the number of volunteers who served these hours) in all of the assignments performed in "transitional shelters." This organization can group all of its "transitional shelter" assignments into a cluster even if these assignments are located under different Places. A different cluster can be created for each different community service or human need tracked.





Here's how to use the Cluster field to create assignment clusters:

### Step 1: Create the Assignment Cluster Names

A system operator must first create items for the Cluster field drop down menu. One drop down item must be created to represent each Assignment that is shared by multiple Places.

Take the following steps to customize the Cluster field drop down items:

1. Choose Setup from the menu.
2. Click on Field options.
3. Click on Assignment tab.
4. Click on Cluster. (This field was formerly known as "Impact.")
5. Under the drop down table items section, add a new item for the name of an Assignment tracked under multiple Places (for example, "Birding"). Click Save.
6. Add drop down items for each of the Assignment clusters to be created.

## Step 2: Apply each Assignment to a Cluster

1. Choose Assignments from the menu.
2. Click on the name of the first Assignment you want to appear in a specific cluster.
3. On the Assignment tab, locate the Cluster field. Choose the appropriate item from the drop down list. For example, if the Assignment record is for "Birding," choose "Birding" from the drop down list.

### Birding

The screenshot shows a web form for an assignment titled "Birding". At the top, there are tabs for "Assignment", "Coordinators", "Profile", "Description", "Volunteers", and "Schedule". Below the tabs are three buttons: "Save", "Cancel", and "Combine, move or delete". The form is divided into sections: "Name", "Address", and "Status". In the "Name" section, "Site: Park A" and "Place: Environmental Education" are displayed. The "Assignment" field contains "Birding". The "Cluster" field is a dropdown menu with "Birding" selected and highlighted. To the right of the "Cluster" field are checkboxes for "Sign-in option" (unchecked) and "Schedule reminders" (checked). In the "Address" section, there are three "Street" fields: "Street 1: Invasive Species Removal", "Street 2: Mammals", and "Street 3: Playground". There are also "City" and "State" fields. To the right of the address fields are "Home", "Work", and "Cell" phone number fields, each with a checkbox. The "Home" field contains "(555) 555-5555" and is checked.

4. Click Save.
5. Repeat this process for all Assignments, so that each Assignment is related to the correct cluster.

## Step 3: Creating a Set of all volunteers who serve in Assignments in the same cluster

Once each Assignment contains the name of its cluster in the appropriate field on the Assignment tab, system operators can define a Set rule based on this information.

1. Choose Sets from the menu.
2. Click the Create a new set button.
3. Enter a name for your Set (for example, "Birding Cluster"), and choose to include volunteers in this Set based on their Assignment Cluster. Click Go.
4. Choose to include volunteers if they have an assignment in ...(choose the appropriate cluster name from the drop down list).

The volunteers included in the Set can be limited to only those with specific roles in the Assignment, and/or those with specific "From" or "To" dates in the Assignment.

5. Click the Finished button.

Once this Set has been created for a cluster, Volgistics reports can be configured to include only volunteers in the Set. In this way, system operators can track all volunteers doing the same job in different Places and Sites, while still organizing Sites, Places and Assignments in the most logical manner.

#### Related help

[Help Topic 2184 \[pg:0863\]](#) - How to print a report for a Set

[Help Topic 2099 \[pg:0096\]](#) - Tracking Assignments

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## How to Setup Characteristic Fields

Help topic 1157

Added or revised 11-17-2016

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Characteristic fields can be used to track useful information about volunteers and/or Assignments. If you are not already on the Field Properties setup page for a characteristic field, you can get there like this:

1. Choose Setup from the menu.
2. Click on "Field options."
3. Click on "Profile tab (for volunteers)."

Note: This is where you will click to create or edit a characteristic field, regardless of whether the field is for use on the Profile tab of the volunteer records, the Profile tab of the Assignment records, or both.

4. Scroll down to the [Characteristic fields](#) section, and either click on the name of the field you want to edit or click on the "Add a new Characteristic" link to add a new characteristic field.

Use the following sections of the Field Properties setup page to customize the characteristic field:

#### Characteristic name

Enter the name of the characteristic you will track in this text field.

#### You can choose

From the drop down menu, choose either "As many as you want" or "Just one."

**Please note:** Changing these options for an existing field may wipe out all data currently in volunteer records for the characteristic field. For example, if the option for a field is set to *As many as you want* and there are volunteer records in your account with multiple items marked, if you change the option to *Just one* for the field it will erase all items currently checked for the field in the volunteer records.

*As many as you want:* Choosing this option sets up the characteristic field items (which you will add below) as checkbox fields. In this case, you can select as many of the items as applicable, and the box will look like this:

### Skills

- Accounting  Data entry  Grant writing  
 Public speaking

*Just one:* Choosing this option will create the characteristic field items as radio buttons. You will only be able to select one option, and the characteristic field box will look like this:

### Skills

- Accounting  Data entry  Grant writing  
 Public speaking

### Use this for...

Select the following option to insert a box for this characteristic on both the volunteer record Profile tab and the Assignment record Profile tab. When this option is selected, you will be able to create a [Set \[pg:0858\]](#) based on the characteristic field to find volunteers with a certain item marked.

- Use this characteristic for matching volunteers and assignments.  
This characteristic appears on the Profile tab for both volunteers and assignments.

Select the option below to insert a box for this characteristic on the Profile tab for volunteers but not for Assignments.

- Track this characteristic for volunteers only.  
This characteristic appears on the Profile tab for volunteers only

Select the option below to insert a box for this characteristic on the Profile tab for Assignments but not for volunteers.

- Track this characteristic for assignments only.  
This characteristic appears on the Profile tab for assignments only

### Items

Use the "Add a new item" field to enter and save the first option for this characteristic. If, for example, your characteristic is called "Skills" you might create an item called "Accounting." Once the first item has been saved, add additional items in the same way until all necessary options are entered.

If you are editing an existing characteristic field's items, you can find help on using the **Delete** and **Merge** buttons [here \[pg:0963\]](#).

### System operator rights

Use this section to determine whether this characteristic field should be "View and Change," "View only" or "Hidden" to system operators, based on their user level (Volgistics Administrator, Power user or Basic user).

Click **Save** to save your changes and add the characteristic field to your database, **Delete** to delete the field, or **Cancel** to close the page without saving your changes.

### Related help

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## Fields in Volgistics

Help topic 1174

Added or revised 02-14-2012

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Volunteer, Assignment and Coordinator records are organized by tabs, and information is stored in fields on each tab in the record. This help topic provides a list of all possible fields in Volgistics, along with the name of the tab on which each field can be found and the type of field it is.

Tab	Default Field Name	Field Type
Core	Last name	Text (30)
Core	First name	Text (30)
Core	Middle name	Text (30)
Core	Nickname	Text (30)
Core	Title	Dropdown
Core	Number	Number
Core	Status	Dropdown
Core	Flags	Dropdown
Core	Type	Dropdown
Core	Kind	Radio Button
Core	Group Name	Text (50)
Core	Members	Number
Core	Participation	Radio Button
Core	Street 1	Text (40)
Core	Street 2	Text (40)
Core	Street 3	Text (40)
Core	City	Text (40)
Core	State	Dropdown
Core	Zip	Zip/Post code
Core	Country	Dropdown
Core	No postal mail	Checkbox

Core	No email	Checkbox
Core	No text message (Only appers if text messaging enabled)	Checkbox
Core	Home	Phone number
Core	Ok to call	Checkbox
Core	Work	Phone number
Core	Ok to call	Checkbox
Core	Cell	Phone number
Core	Ok to call	Checkbox
Core	Text (Only appers if text messaging enabled)	Phone number
Core	Fax	Phone number
Core	Ok to call	Checkbox
Core	Pager	Phone number
Core	Ok to call	Checkbox
Core	Other	Phone number
Core	Ok to call	Checkbox
Core	Email	Text (50)
Core	Web site	Text (70)
Profile (for volunteers)	Photo	Photo file
Profile (for volunteers)	Date of birth	Date
Profile (for volunteers)	Age	Number
Profile (for volunteers)	Spare dropdown 1	Dropdown
Profile (for volunteers)	Spare dropdown 2	Dropdown
Profile (for volunteers)	Spare dropdown 3	Dropdown
Profile (for volunteers)	Spare dropdown 4	Dropdown
Profile (for volunteers)	Spare dropdown 5	Dropdown
Profile (for volunteers)	Spare dropdown 6	Dropdown
Profile (for volunteers)	Spare field 1	Variable*
Profile (for volunteers)	Spare field 2	Variable*
Profile (for volunteers)	Spare field 3	Variable*
Profile (for volunteers)	Spare field 4	Variable*
Profile (for volunteers)	Spare field 5	Variable*
Profile (for volunteers)	Spare field 6	Variable*
Profile (for volunteers)	Spare checkbox 1	Checkbox

Profile (for volunteers)	Spare checkbox 2	Checkbox
Profile (for volunteers)	Spare checkbox 3	Checkbox
Profile (for volunteers)	Spare checkbox 4	Checkbox
Profile (for volunteers)	Spare checkbox 5	Checkbox
Profile (for volunteers)	Spare checkbox 6	Checkbox
Profile (for volunteers)	Daily availability	Depends on configuration
Profile (for volunteers)	My availability is	Dropdown
Profile (for volunteers)	From	Date
Profile (for volunteers)	to	Date
Profile (for volunteers)	I would like to serve up to	Number
Profile (for volunteers)	Hours	Dropdown
Profile (for volunteers)	Characteristic fields (up to 20 characteristics)	Depends on configuration (unlimited number of items under each characteristic)
Profile (for volunteers)	Preference fields (up to 20 preference fields)	Depends on configuration
Service	Assignment	Assignment list
Service	Role	Dropdown
Service	From	Date
Service	To	Date
Service	Spare date	Date
Service	Spare dropdown	Dropdown
Service	Spare checkbox	Checkbox
Service	Assignment	Assignment list
Service	Merit hours	Hours and minutes
Service	Service measure	System field
Service	Service measure	System field
Service	Service measure	System field
Service	Service measure	System field
Service	Service measure	System field
Service	Service measure	System field
Service	Program	Dropdown
Service	Starting date	Date
Service	Due by	Date
Service	Completed on	Date

Service	Completed	Checkbox
Service	Service required	System field
History	Date	Date
History	Expires	Date
History	Date event	Dropdown
History	Class event	Dropdown
History	Mail event	Dropdown
History	Notation (for Status dates)	Dropdown
History	Notation (for Checklist dates)	Dropdown
History	Notation (for Award dates)	Dropdown
History	Notation (for Class dates)	Dropdown
History	Notation (for Date dates)	Dropdown
History	Notation (for Mail dates)	Dropdown
History	Spare date	Date
History	Spare dropdown	Dropdown
History	Spare checkbox	Checkbox
History	Spare text	Text (24)
History	Date entered	Date
History	Start date	Date
History	Stop date	Date
Contacts	Last name	Text (30)
Contacts	First name	Text (30)
Contacts	Middle name	Text (30)
Contacts	Nickname	Text (30)
Contacts	Title	Dropdown
Contacts	Street 1	Text (40)
Contacts	Street 2	Text (40)
Contacts	Street 3	Text (40)
Contacts	City	Text (40)
Contacts	State	Dropdown
Contacts	Zip	Zip/Post code
Contacts	Country	Dropdown
Contacts	Home	Phone number
Contacts	Ok to call	Checkbox
Contacts	Work	Phone number



Contacts	Ok to call	Checkbox
Contacts	Cell	Phone number
Contacts	Ok to call	Checkbox
Contacts	Fax	Phone number
Contacts	Ok to call	Checkbox
Contacts	Pager	Phone number
Contacts	Ok to call	Checkbox
Contacts	Other	Phone number
Contacts	Ok to call	Checkbox
Contacts	Email	Text (50)
Contacts	Web site	Text (70)
Contacts	Kind	Dropdown
Contacts	Relationship	Dropdown
Contacts	Employer name	Text (50)
Contacts	Contacted	Dropdown
Contacts	Verified	Date
Contacts	Spare date	Date
Contacts	Spare field	Text (30)
Notes	Notes	Memo
Vic	Access Disabled	Checkbox
Vic	Temporary Password	Password
Vic	Share my schedule	Checkbox
Site	Site	Text (72)
Site	Type	Dropdown
Site	Street 1	Text (40)
Site	Street 2	Text (40)
Site	Street 3	Text (40)
Site	City	Text (40)
Site	State	Dropdown
Site	Zip	Zip/Post code
Site	Country	Dropdown
Site	Home	Phone number
Site	Ok to call	Checkbox
Site	Work	Phone number
Site	Ok to call	Checkbox

Site	Cell	Phone number
Site	Ok to call	Checkbox
Site	Fax	Phone number
Site	Ok to call	Checkbox
Site	Pager	Phone number
Site	Ok to call	Checkbox
Site	Other	Phone number
Site	Ok to call	Checkbox
Site	Email	Text (50)
Site	Web site	Text (70)
Site	Spare dropdown 1	Dropdown
Site	Spare dropdown 2	Dropdown
Site	Spare dropdown 3	Dropdown
Site	Spare dropdown 4	Dropdown
Site	Spare dropdown 5	Dropdown
Site	Spare dropdown 6	Dropdown
Site	Spare field 1	Variable
Site	Spare field 2	Variable
Site	Spare field 3	Variable
Site	Spare field 4	Variable
Site	Spare field 5	Variable
Site	Spare field 6	Variable
Site	Spare checkbox 1	Checkbox
Site	Spare checkbox 2	Checkbox
Site	Spare checkbox 3	Checkbox
Site	Spare checkbox 4	Checkbox
Site	Spare checkbox 5	Checkbox
Site	Spare checkbox 6	Checkbox
Place	Place	Text (72)
Place	Type	Dropdown
Place	Street 1	Text (40)
Place	Street 2	Text (40)
Place	Street 3	Text (40)
Place	City	Text (40)
Place	State	Dropdown

Place	Zip	Zip/Post code
Place	Country	Dropdown
Place	Home	Phone number
Place	Ok to call	Checkbox
Place	Work	Phone number
Place	Ok to call	Checkbox
Place	Cell	Phone number
Place	Ok to call	Checkbox
Place	Fax	Phone number
Place	Ok to call	Checkbox
Place	Pager	Phone number
Place	Ok to call	Checkbox
Place	Other	Phone number
Place	Ok to call	Checkbox
Place	Email	Text (50)
Place	Web site	Text (70)
Place	Spare dropdown 1	Dropdown
Place	Spare dropdown 2	Dropdown
Place	Spare dropdown 3	Dropdown
Place	Spare dropdown 4	Dropdown
Place	Spare dropdown 5	Dropdown
Place	Spare dropdown 6	Dropdown
Place	Spare field 1	Variable
Place	Spare field 2	Variable
Place	Spare field 3	Variable
Place	Spare field 4	Variable
Place	Spare field 5	Variable
Place	Spare field 6	Variable
Place	Spare checkbox 1	Checkbox
Place	Spare checkbox 2	Checkbox
Place	Spare checkbox 3	Checkbox
Place	Spare checkbox 4	Checkbox
Place	Spare checkbox 5	Checkbox
Place	Spare checkbox 6	Checkbox
Assignment	Assignment	Text (72)

Assignment	Cluster	Dropdown
Assignment	Status	Dropdown
Assignment	Advertise	Checkbox
Assignment	Sign-in option	Checkbox
Assignment	Schedule reminders	Checkbox
Assignment	Street 1	Text (40)
Assignment	Street 2	Text (40)
Assignment	Street 3	Text (40)
Assignment	City	Text (40)
Assignment	State	Dropdown
Assignment	Zip	Zip/Post code
Assignment	Country	Dropdown
Assignment	Home	Phone number
Assignment	Ok to call	Checkbox
Assignment	Work	Phone number
Assignment	Ok to call	Checkbox
Assignment	Cell	Phone number
Assignment	Ok to call	Checkbox
Assignment	Fax	Phone number
Assignment	Ok to call	Checkbox
Assignment	Pager	Phone number
Assignment	Ok to call	Checkbox
Assignment	Other	Phone number
Assignment	Ok to call	Checkbox
Assignment	Email	Text (50)
Assignment	Web site	Text (70)
Assignment	Spare dropdown 1	Dropdown
Assignment	Spare dropdown 2	Dropdown
Assignment	Spare dropdown 3	Dropdown
Assignment	Spare dropdown 4	Dropdown
Assignment	Spare dropdown 5	Dropdown
Assignment	Spare dropdown 6	Dropdown
Assignment	Spare field 1	Variable
Assignment	Spare field 2	Variable
Assignment	Spare field 3	Variable

Assignment	Spare field 4	Variable
Assignment	Spare field 5	Variable
Assignment	Spare field 6	Variable
Assignment	Spare checkbox 1	Checkbox
Assignment	Spare checkbox 2	Checkbox
Assignment	Spare checkbox 3	Checkbox
Assignment	Spare checkbox 4	Checkbox
Assignment	Spare checkbox 5	Checkbox
Assignment	Spare checkbox 6	Checkbox
Description	Duties	Memo
Description	Qualifications	Memo
Description	Directions	Memo
Profile tab (for	Availability needed	Dropdown
Profile tab (for	From	Date
Profile tab (for	To	Date
Profile tab (for	Volunteers serve up to	Number
Profile tab (for	Hours	Dropdown
Coordinator	Last name	Text (30)
Coordinator	First name	Text (30)
Coordinator	Middle name	Text (30)
Coordinator	Nickname	Text (30)
Coordinator	Title	Dropdown
Coordinator	Street 1	Text (40)
Coordinator	Street 2	Text (40)
Coordinator	Street 3	Text (40)
Coordinator	City	Text (40)
Coordinator	State	Dropdown
Coordinator	Zip	Zip/Post code
Coordinator	Country	Dropdown
Coordinator	No postal mail	Checkbox
Coordinator	No email	Checkbox
Coordinator	Home	Phone number
Coordinator	Ok to call	Checkbox
Coordinator	Work	Phone number
Coordinator	Ok to call	Checkbox

Coordinator	Cell	Phone number
Coordinator	Ok to call	Checkbox
Coordinator	Fax	Phone number
Coordinator	Ok to call	Checkbox
Coordinator	Pager	Phone number
Coordinator	Ok to call	Checkbox
Coordinator	Other	Phone number
Coordinator	Ok to call	Checkbox
Coordinator	Email	Text (50)
Coordinator	Web site	Text (70)
Coordinator	Position	Dropdown
Coordinator	Spare lookup	Dropdown
Coordinator	Spare date	Date
Coordinator	Spare date	Date
Coordinator	Job title	Text (30)
Coordinator	Relationship	Dropdown
Coordinator	Spare lookup	Dropdown
Coordinator	Spare checkbox	Checkbox
Coordinator	Spare date	Date

\* **Fields with the Variable field type may be configured to be:**

- Text (24)
- Date
- Number (whole)
- Number (1 decimal place)
- Number (2 decimal places)
- Currency
- Social security number

#### **Related help**

[Help Topic 2024 \[pg:1849\]](#) - Volunteer record organization

[Help Topic 2017 \[pg:0957\]](#) - Field setup

[Help Topic 1070 \[pg:0933\]](#) - Tab rights page

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## No text message Field Properties Setup Page

Help topic 1302

Added or revised 09-10-2014

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You can use the No text message Field Properties setup page to configure the *No text message* field on the Coordinator tab of a [Coordinator \[pg:0163\]](#) record. To get to the Coordinator tab No text message Field Properties setup page, choose [Setup \[pg:0887\]](#) from the [menu \[pg:0215\]](#), click on Field options, Coordinator fields, and then choose *No text message*.

### Field location:

This section indicates where the No text message field you are working with is located. In this case, the field is on the Coordinator tab of Coordinator records.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that this is a Checkbox field.

### Field name:

The field is called "No text message." You can change this if you wish.

### Hidden:

No

"No" is the default option here. "No" must be selected in order for [System Operators \[pg:0065\]](#) to see this field and the information it contains on the Coordinator tab of a Coordinator record.

Yes

If you do not want System Operators to be able to view the No text message field on the Coordinator tab of a Coordinator record, you can select "Yes" from the dropdown list. When a field is hidden, System Operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later un-hide the field.

Whether or not it is hidden can become very important for this particular field. Consider the following scenario: If a No text message field is used and is checked for a Coordinator, but then the field is hidden, it will not as obvious why a Coordinator is not receiving text messages.

### Default entry:

You can decide if the No text message field on the Coordinator tab is initially marked or unmarked in all new volunteer records by making the desired selection here.

### **System Operator rights**

This section determines which levels of [System Operators \[\\_\\_\\_\\_\\_\]](#) can view, or view and change, this field in Volgistics.

### Volgistics Administrators

### *View and change*

Select this option to permit System Operators designated as **Volgistics Administrators** [pg:0052] to view and edit this field.

### *View*

Select this option to permit System Operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent System Operators designated as Volgistics Administrators from both editing and viewing this field.

### Power users

#### *View and change*

Select this option to permit System Operators designated as Power users to view and edit this field.

#### *View*

Select this option to permit System Operators designated as Power users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent System Operators designated as Power users from both editing and viewing this field.

### Basic users

#### *View and change*

Select this option to permit System Operators designated as Basic users to view and edit this field.

#### *View*

Select this option to permit System Operators designated as Basic users to view this field, but to prevent them from making any changes to it.

#### *Hidden*



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## No text message Field Properties Setup Page

Help topic 1303

Added or revised 09-10-2014

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You can use the No text message Field Properties setup page to configure the *No text message* field on the [Core tab \[pg:1868\]](#) in the volunteer record. To get to the Core tab No text message Field Properties setup page, choose [Setup \[pg:0887\]](#) from the [menu \[pg:0215\]](#), click on Field options, Core tab, and then choose *No text message*.

### Field location:

This section indicates where the No text message field you are working with is located. In this case, the field is on the Core tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that this is a Checkbox field.

### Field name:

The field is called "No text message." You can change this if you wish.

### Hidden:

No

"No" is the default option here. "No" must be selected in order for [System Operators \[pg:0065\]](#) to see this field and the information it contains on the Core tab of the volunteer record.

Yes

If you do not want System Operators to be able to view the No text message field on the Core tab of the volunteer record, you can select "Yes" from the dropdown list. When a field is hidden, System Operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later un-hide the field.

Whether or not it is hidden can become very important for this particular field. Consider the following scenario: If a No text message field is used and is checked for a volunteer, but then the field is hidden, it will not as obvious why a volunteer is not receiving text messages.

### Default entry:

You can decide if the No text message field on the Core tab is initially marked or unmarked in all new volunteer records by making the desired selection here.

### **System Operator rights**

This section determines which levels of [System Operators \[\\_\\_\\_\\_\\_\]](#) can view, or view and change, this field in Volgistics.

### Volgistics Administrators

### *View and change*

Select this option to permit System Operators designated as **Volgistics Administrators** [pg:0052] to view and edit this field.

### *View*

Select this option to permit System Operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent System Operators designated as Volgistics Administrators from both editing and viewing this field.

### Power users

#### *View and change*

Select this option to permit System Operators designated as Power users to view and edit this field.

#### *View*

Select this option to permit System Operators designated as Power users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent System Operators designated as Power users from both editing and viewing this field.

### Basic users

#### *View and change*

Select this option to permit System Operators designated as Basic users to view and edit this field.

#### *View*

Select this option to permit System Operators designated as Basic users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

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## Text Field Properties Setup Page

Help topic 1304

Added or revised 09-10-2014

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You can use the Text Field Properties setup page to configure the Text field on the Coordinator tab of the [Coordinator \[pg:0163\]](#) record. To get to the Coordinator tab Text Field Properties setup page, choose [Setup \[pg:0887\]](#) from the [menu \[pg:0215\]](#), click on Field options, *Coordinator fields*, and then choose Text.

This field is related to the [text messaging \[pg:0352\]](#) feature in Volgistics. While you can make the changes listed below for this field, the actual content of the field cannot be changed by a [System Operator \[pg:0065\]](#). This is because regulations require Coordinators to [opt-in \[pg:0323\]](#) to use text messaging. When a Coordinator opts-in to text messaging, the number they used during the opt-in process will show in this field.

### Field location:

This section indicates where the Text field you are working with is located. In this case, the field is on the Coordinator tab of the [Coordinator \[pg:0163\]](#) record.

### Phone number format:

There are five phone number format options or you can select no formatting. Select the way you would like Text phone numbers to appear on volunteer records and lists from the dropdown list.

### Field name:

This field is called "Text" by default. To change the name of the field, delete the field's name and enter the name you would like to change the field to.

### Hidden:

No

"No" is the default option here. "No" must be selected in order for [System Operators \[pg:0065\]](#) to see this field and the information it contains on the Core tab of the volunteer record.

Yes

If you do not want System Operators to be able to view the Text field on the Core tab of the volunteer record, you can select "Yes" from the dropdown list. When a field is hidden, System Operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

### **System Operator rights**

This section determines which types of [System Operators \[\\_\\_\\_\\_\\_\]](#) can view this field in Volgistics. Please note that there is not a *View and change* option like there is with other fields because regulations do not allow System Operators to change the information in this field. Please see the information box at the top of this help topic for more information.

### Volgistics Administrators

*View only*

Select this option to permit System Operators designated as Volgistics Administrators to view this field.

*Hidden*

Select this option to prevent System Operators designated as Volgistics Administrators from viewing this field.

Power users

*View only*

Select this option to permit System Operators designated as Power users to view this field.

*Hidden*

Select this option to prevent System Operators designated as Power users from viewing this field.

Basic users

*View only*

Select this option to permit System Operators designated as Basic users to view this field.

*Hidden*

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## Text Field Properties Setup Page

Help topic 1310

Added or revised 09-10-2014

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You can use the Text Field Properties setup page to configure the Text field on the [Core tab \[pg:1868\]](#) of the volunteer record. To get to the Core tab Text Field Properties setup page, choose [Setup \[pg:0887\]](#) from the [menu \[pg:0215\]](#), click on Field options, Core tab, and then choose Text.

This field is related to the [text messaging \[pg:0352\]](#) feature in Volgistics. While you can make the changes listed below for this field, the actual content of the field cannot be changed by a [System Operator \[pg:0065\]](#). This is because regulations require volunteers to [opt-in \[pg:0323\]](#) to use text messaging. When a volunteer opts-in to text messaging, the number they used during the opt-in process will show in this field.

Field location:

This section indicates where the Text field you are working with is located. In this case, the field is on the [Core tab \[pg:1868\]](#).

Phone number format:

There are five phone number format options or you can select no formatting. Select the way you would like Text phone numbers to appear on volunteer records and lists from the dropdown list.

Field name:

This field is called "Text" by default. To change the name of the field, delete the field's name and enter the name you would like to change the field to.

Hidden:

*No*

"No" is the default option here. "No" must be selected in order for [System Operators \[pg:0065\]](#) to see this field and the information it contains on the Core tab of the volunteer record.

*Yes*

If you do not want System Operators to be able to view the Text field on the Core tab of the volunteer record, you can select "Yes" from the dropdown list. When a field is hidden, System Operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

**System Operator rights**

This section determines which types of [System Operators \[\\_\\_\\_\\_\\_\]](#) can view this field in Volgistics. Please note that there is not a *View and change* option like there is with other fields because regulations do not allow System Operators to change the information in this field. Please see the information box at the top of this help topic for more information.

Volgistics Administrators

*View only*

Select this option to permit System Operators designated as Volgistics Administrators to view this field.

*Hidden*

Select this option to prevent System Operators designated as Volgistics Administrators from viewing this field.

Power users

*View only*

Select this option to permit System Operators designated as Power users to view this field.

*Hidden*

Select this option to prevent System Operators designated as Power users from viewing this field.

Basic users

*View only*

Select this option to permit System Operators designated as Basic users to view this field.

*Hidden*

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## Field Setup

Help topic 2017

Added or revised 03-31-2017

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You can customize many of the fields you use to store volunteer, Assignment, Site, Place, and coordinator information in Volgistics. For example, you can re-name a field to more closely suit your organization's needs, hide fields you don't currently care to use, create custom fields to track information you need, and add or change entries for fields that have dropdown lists.

Before you can customize a field in Volgistics, you must know which Tab the field is located on. Every volunteer, Assignment, Site, Place, and Coordinator field is located on one tab or another. For example, the *Date of Birth* field is located on the Profile tab in the volunteer record.

To locate the tab that contains the field you want to modify, just browse through the database until you locate the field, and then note which tab it's on. Note that some tabs may have fields that you cannot currently see because they're hidden. In these cases, make a note of the tab you want to add a field to.

The Tab Name

Core Profile Service

Save Cancel  Tagged

**Personal**

Date of birth:  Age:

Gender:

Education:

The Field Name **Spare dropdown 1:**

Spare dropdown 2:

To change a field's properties:

1. Choose Setup from the [menu \[pg:0215\]](#).
2. Click on *Field Options*. A list of all the tabs in Volgistics appears.
3. Select the tab that contains the field you would like to customize. A list of all the fields located on this tab appears.
4. Click the field you want to customize. The Field Properties window opens.

Depending upon the field you have selected, you can rename or hide the field, require an entry in the selected field, establish a default entry, format the field, maintain dropdown list entries, establish database operator rights, and clear information currently stored in the field.

**Spare field 1**  
**Field Properties**

Field location: **Profile tab**

Field format: Text

Field name: School

Hidden: No

Require an entry: No

Default entry:

System operator rights

Volgistics Administrators: View and change

Power users: View and change

Basic users: View and change

Save Cancel

### Changing the name of the field

If you want to change a field's name, enter the new field name in *Field name*, then click the **Save** button.

The original name of the field always appears at the top of the Field Properties screen. If you want to change the name of the field back to the default, type the original name in *Field name*.

Things to consider if you rename fields:

- When you change a field name, Volgistics limits the length of the new field name to 39 characters.
- The field is renamed for every record in the system.
- The new field name appears for everyone who uses this Volgistics system in your organization.
- Any information you've already entered in the renamed field is still there. If you're changing a field from "Spouse's Name" to "Parking Pass Number" for instance, any spouse's names already entered will still be there after you change the field name. In these cases, some fields allow you to clear all information by using the **Delete all data from this field** button. See the *Clear this field* section below for more information. Otherwise, you would need to manually remove the old data each time you encounter it in this field.

## Reformatting a field

Most Volgistics fields have a fixed field type (you can't change it). Fields with the default name "Spare field" are the exception to this rule. These fields appear in four locations in Volgistics:

- The Personal box on the volunteer's Profile tab
- The Detail box on the Site tab
- The Detail box on the Place tab
- The Detail box on the Assignment tab

Spare fields are flexible fields—suitable for holding a variety of information. You can format these fields to use any of these formats:

### Text

You can enter any value in a text field including letters, numbers or spaces.

### Date

You must enter two digits for the month and two digits for the day in a date field (e.g. July would be entered as "07" instead of "7"). You can enter years as two digits or four digits. If you enter a two-digit year, Volgistics converts your entry to a four-digit year.

### Number (whole)

You can enter any whole number in these fields (e.g. 123).

### Number (1 decimal place)

You can enter any number with up to one decimal place in these fields (e.g. 25.5).

### Number (2 decimal places)

You can enter any number with up to two decimal places in these fields (e.g. 25.25).

### Currency

You can enter any number in these fields. Numbers you enter in these fields will contain two decimal places and a dollar sign.

### Social Security Number\*\*

Entries in this field must contain 9 digits. Volgistics will format entries using social security format (123-45-6789). You can enter social security numbers with or without punctuation: 123-45-6789 or 123456789.

Keep these things in mind if you change the format of a field:

- If you do not see a *Field Format* selection, it means that you cannot change this particular field's format.
- Be sure the field's format is consistent with the kind of information you want to store in the field.
- Any information you've already entered in the reformatted field is still there. If you're changing a field from "Spouse's Name" to "Social Security Number" for instance, any spouse's names already entered will still be there after you change the field name. In these cases, some fields allow you to clear all information by using the **Delete all data from this field** button. See the *Clear this field* section below for more information.



- Otherwise, you would need to manually remove the old data each time you encounter it in this field.

### **Setting a default value**

For some fields (but not all) you can specify a "default value."

A default value works like this: when you're entering a new record and you pass through a field without making an entry, Volgistics inserts the default value for the field. A common use of default values is in the City and State fields. For example, you can enter the most common state or province your volunteers live in as the default value. Then when you add new records you won't need to enter the state or province for people who live in that state or province - simply pass through the state field and Volgistics will add your default value.

If the *Default value* setting is unavailable, this field does not support default values.

### **Require an entry**

For some fields (but not all), you can specify that the field may not be left blank. If you check this option, System Operators cannot save a record until they have made an entry in this field. If you do not check this option, an entry in this field is optional.

Normally you would require an entry only for the fields of information that are critical to your program.

Use this option sparingly! Remember that an operator cannot save a new record if they don't have an entry in required fields. Therefore you should only require an entry for fields that, if left empty, would render the rest of the record useless.

Consider this example: many people assume that the zip code field should be required since mail can't be delivered without it. But periodically they want to establish records for prospective volunteers who have called in but who haven't yet provided their complete addresses. If the zip code is required, you will not be able to enter these records. Consequently there's a chance that these valuable prospective volunteer leads could be lost because they couldn't be entered into the system.

### **Hiding an entry**

Set Hidden to "Yes" if you don't want this field to appear on the tab where it would normally appear.

You can hide fields you don't currently use in order to simplify the screen, and to eliminate the chance an operator will enter something in this field just because it's there. For example, if you don't want to track your volunteers' ages, you can hide the Age field.

Other things to consider if you hide fields

- The field is hidden for all records.
- You can unhide the field if you choose to use it later.
- Any information entered in the field before it was hidden will still be there if you later unhide the field.

### **Managing dropdown list items**

Dropdown lists (also known as look-up tables) have a pre-defined list (or table) of entries that you can choose from when entering data. Dropdown lists have a down-arrow attached to their right edge. The table of entries appears when you click the down-arrow.

If the selected field is a dropdown (look at what appears next to *Type of field*), you can use the Field Properties window to maintain field entries. For more information, see [Manage Dropdown Lists \(Look-up Tables\) \[pg:0963\]](#).

## System Operator rights

Choose the field rights, or access, you want each user level to have for the selected field.

In Volgistics, each [System Operator \[pg:0065\]](#) is assigned a user level. This can be "System administrator," "Power user," or "Basic user." For each of these three user levels, you can set the following rights for the field you're modifying:

### View and change

Any operator for the user level selected has full access to the selected field. They can see the field, plus enter and edit its contents.

### View only

Any operator for the user level selected can see the field, but cannot enter or edit its contents.

### Hidden

Any operator for the user level selected will not be able to see the field.

For example, if you set-up a co-worker named Jennifer as a System Operator in Volgistics and assign her the *Power user* level. Jennifer will have whatever level of access you give Power users for each field in the database. If you set the *Date of birth* field so Power users have "View only" access, then Jennifer - and all of your other System Operators who are Power users - will only be able to view the information in the *Date of birth* field. They will not be able to enter or change the information for this field. You might set the *Basic user* level operator rights to "Hidden" for the *Date of birth* field. This means any System Operators in your account who are Basic users will not see the *Date of birth* field on the Profile tab at all.

## More Help

Note that in addition to customizing rights for specific fields, you can control access to an entire tab. Each tab in the volunteer record is visible to each level of operator by default. However, you can hide a tab to System Operators based on their user level. [Help topic 1070 \[pg:0933\]](#) has more information on setting this up for your account.

You can find more information on configuring operator rights, plus examples of how these changes will appear for operators, in [help topic 2028 \[pg:0053\]](#)

## Clear this field

If you no longer want to keep any data that is already entered in this field for your volunteer records, you can optionally clear this field. Clearing this field deletes **all** of the data previously entered into this field for **every** volunteer record in your database. This includes archived volunteer records, volunteer records at all Sites, and new applications. You should clear this field only if you are certain you will no longer need any data currently

entered into it. There is not a way to reverse, or restore, this information once the field is cleared.

If the field is a dropdown list, clearing this field also deletes any dropdown list (look-up table) items currently defined for the field.

If you're sure you want to proceed, click the **Delete all data from this field** button. This will open a confirmation screen that double checks if you wish to proceed. Click the **Cancel** button if you want to stop without clearing the information. Enter the password you use to login to Volgistics with and click the **Continue** button if you want to proceed with clearing the field.

## **\*\*Assess & Limit Your Risk**

No matter what tools you use to track volunteer information, there's often a simple way to limit your risk when it comes to storing your volunteer's personal information.

In the United States, most state and federal laws governing the protection of privacy define protected personal information as first and last name, plus any one of these: Social security number (SSN); Driver's license number; Financial account or credit card number.

While tracking a volunteer's first and last name is naturally important, it is often possible to operate a volunteer program successfully without asking volunteers to provide their social security number or driver's license number. If you can operate this way, and make it a policy to do so, you will have substantially reduced your vulnerability from the very start.

Some volunteer programs must collect and store social security and/or driver's license numbers. For example, organizations that perform background checks on prospective volunteers typically need one or both of these numbers. In these cases you should carefully examine how you collect and store this information.

If you choose to store social security and driver's license numbers in Volgistics, this information (and all other information you track) is protected by Volgistics as described in [help topic 1014 \[pg:0181\]](#)

If you prefer not to store social security numbers and driver's license numbers in Volgistics, you can still use Volgistics effectively for all other volunteer recruiting, tracking, and coordination functions. You can use the Volgistics PIN number as a common key to associate each volunteer's Volgistics record with their social security numbers and/or driver's license numbers stored locally on your own computer or network. If you choose this approach, be sure you protect the information you store locally.

It is also a good idea to require strong passwords for the [System Operators \[pg:0065\]](#) who access your account. Volgistics allows you to customize the password strength rules for your account on the [System Operators Ground Rules \[pg:1442\]](#) page. Options include case sensitivity, password length requirements from 6 to 30 characters, password expirations in 30 day increments from 30 to 300 days, and mandatory inclusion of numeric characters and symbols.

*Strong password requirements can help eliminate security vulnerability caused by the human tendency to use simple, easy-to-guess passwords*

Volgistics was designed to track volunteer records, not patient information. Therefore, the system does not include Protected Health Information and Volgistics should not be considered a Covered Entity for [HIPAA \[pg:0091\]](#) purposes.

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## Manage Dropdown Lists (Look-up Tables)

Help topic 2018

Added or revised 05-10-2013

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Dropdown lists (also known as look-up tables) have a pre-defined list, or table, of entries that you can choose from when entering data. Dropdown lists have a down-arrow attached to their right edge. The list of entries appears when you click the down-arrow.

Examples of dropdown lists include:

The Title, Status, State, and Flags fields on the Core tab

The Gender field on the Profile tab

The Assignment field on a service entry

Fields with dropdown lists look like this:

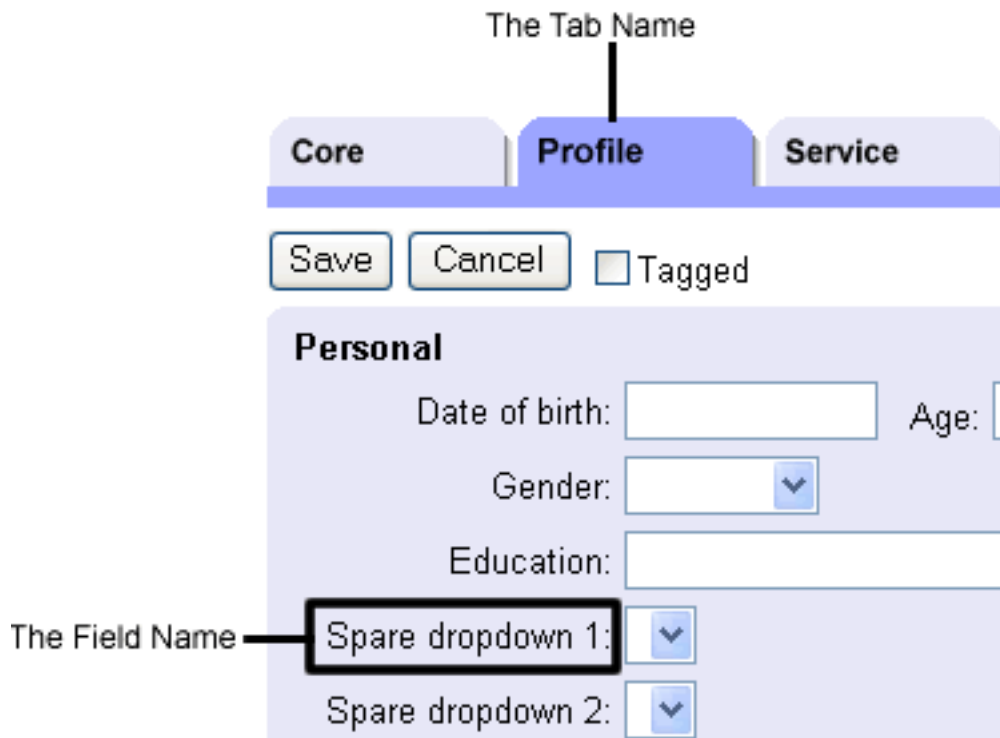


A screenshot of a web form field. The label 'Status:' is on the left. To its right is a rectangular box containing the text 'Active' and a small blue downward-pointing arrow on the right side, indicating a dropdown menu.

Occasionally you may need to maintain these tables by adding new entries, correcting the spelling of an entry, merging entries, or deleting entries. To perform any of these functions, you first need to know two things:

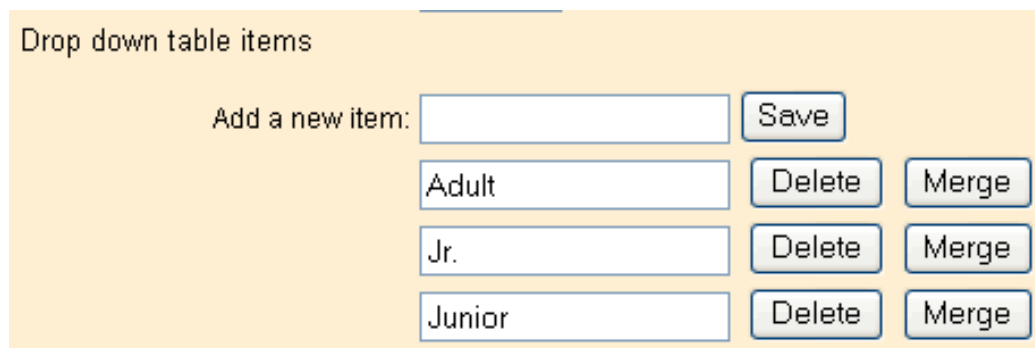
- The name of the field you would like to customize.
- The name of the tab that contains the field.

Just browse for the field whose properties need to be adjusted. Note the field name and the name of the tab that contains the field:



To manage a dropdown list:

1. Choose Setup from the [menu \[pg:0215\]](#).
2. Select "Field Options." A list of all the tabs in Volgistics appears.
3. Select the tab that contains the dropdown list you'd like to edit. A list of all the fields located on this tab appears.
4. Select the field you would like to customize. The Field Properties window opens.
5. Use the "Drop-down table items" section to manage the dropdown list.



Using this section of the [Field Properties \[pg:0957\]](#) window, you can:

- Add a new dropdown list entry
- Change a dropdown list entry
- Merge dropdown list entries
- Delete a dropdown list entry

### **Add a new dropdown list entry**

1. Choose Setup from the [menu \[pg:0215\]](#).
2. Select "Field Options."
3. Select the tab that contains the dropdown list you'd like to edit.
4. Select the Field.
5. Next to "Add a new item," type the new entry.
6. Click the **Save** button beside the "Add a new item" field.
7. Repeat steps 5 & 6 for each new entry you need to make.
8. Click the **Save** button at the top or bottom of the page to exit.

### **Change a dropdown list entry**

1. Choose Setup from the [menu \[pg:0215\]](#).
2. Select "Field Options."
3. Select the tab that contains the dropdown list you'd like to edit.
4. Select the Field.
5. Adjust the entry (or entries) as needed.
6. Click the **Save** button at the top or bottom of the page to exit.

### **Merge dropdown list entries**

Occasionally you may need to combine two or more dropdown list entries together in the same field. For example, you may discover that two different entries in a table actually have the same meaning (e.g. "Junior" and "Jr").

1. Choose Setup from the [menu \[pg:0215\]](#).
2. Select "Field Options."

3. Select the tab that contains the dropdown list you'd like to edit.
4. Locate the entry you would like to merge. Click the **Merge** button. For example, if you wanted to merge "Jr" into "Junior," you would click the **Merge** button next to "Jr."
5. Choose the entry you want to merge into, and then click **Go**.

Volgistics will combine the first dropdown list entry you selected into the second one. For example, any record that previously contained the entry "Jr" will now have the entry "Junior" instead. The old entry will no longer appear as an option in this dropdown field.

Note:

Some dropdown lists may have special properties that do not allow you to merge two entries. For example, the [Status \[pg:1832\]](#) dropdown list will not allow you to merge the Status set as the default into another entry.

### Delete a dropdown list entry

You can delete dropdown list entries that are no longer needed.

1. Choose Setup from the [menu \[pg:0215\]](#).
2. Select "Field Options."
3. Select the tab that contains the dropdown list you'd like to edit.
4. Locate the entry you would like to delete.
5. Click the **Delete** button.

The important thing to understand is that deleting the entry from the dropdown list will also remove any instances of that entry from all volunteer records.

Sometimes it is more appropriate to merge one dropdown list entry into another one rather than deleting it. For example, if you discovered that your system contained two dropdown list entries that have the same meaning (e.g. "Jr" and "Junior"), it would be better to merge them together rather than to delete one.

Note:

Some dropdown lists may have special properties that do not allow you to delete an entry. For example, the [Status \[pg:1832\]](#) dropdown list will not allow you to delete a Status because each volunteer record must have a Status associated with it. In this case, you would need to merge the entry with another to eliminate it from the dropdown list.

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# How do I make only certain Assignments appear under Assignment Preference

Help topic 2055

Added or revised 01-18-2017

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You can choose which [Assignments \[pg:0096\]](#) appear for *Assignment Preferences* on your online volunteer [application forms \[pg:0413\]](#) in two different ways. You can control them with the *Advertise* checkbox on the Assignment record, or by limiting an application to just a particular Site.

## Using the *Advertise* checkbox on the Assignment

You can select which Assignments appear in your Assignment Preferences across all Sites by using the

### *Advertise*

checkbox that is on the main tab of the Assignment record. If you use this method, please note that the *Advertise* checkbox also controls which Assignments are listed in your account's [Opportunity Directory \[pg:0420\]](#). So changing the settings for Assignment Preferences will also change which Assignments are shown in the Opportunity Directory.

The first thing you will need to do is change the setup for your Assignment Preference field. You do this by:

1. Choose [Setup \[pg:0887\]](#) from the [menu \[pg:0215\]](#).
2. Select *Field options*.
3. Select *Profile tab (for volunteers)*.
4. Click on the *Assignment Preference* link.
5. Select *Advertised assignments only* from the *Offer* dropdown list.

The screenshot shows a web form titled "Field Properties" for "Assignment Preference". At the top right are buttons for "Save", "Delete", and "Cancel". The form contains the following fields:

- Field location: Profile tab
- Type of field: Preference
- Preference name: Assignment Preference
- You can choose: As many as you want (dropdown)
- Rank by: No ranking (dropdown)
- Offer: Advertised assignments only (dropdown, highlighted with a red box)

At the bottom left, the text "Volunteers choose their" is partially visible.

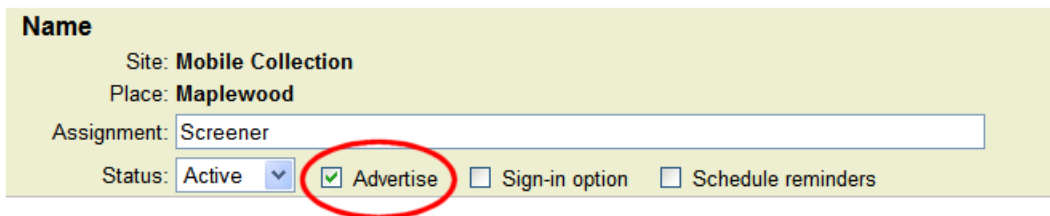
6. Click the **Save** button.

Now you can choose which Assignments will appear as Assignment Preferences like this:

1. Choose *Assignments* from the [menu \[pg:0215\]](#).



2. Click on any Assignment.
3. Check the *Advertise* checkbox on the Assignment tab if the selected Assignment is one you want to appear as an Assignment Preference option on your application forms. Uncheck this checkbox if it is not.



The screenshot shows a form titled "Name" with the following fields and options:

- Site: **Mobile Collection**
- Place: **Maplewood**
- Assignment:
- Status:  (dropdown arrow)
- Advertise** (circled in red)
- Sign-in option
- Schedule reminders

4. Click the **Save** button.

Repeat these steps for each assignment.

### Limit an application to just one Site

If you limit an application to just one particular Site, only Assignments that fall under that Site will appear for the Assignment Preferences on the application form. This can be beneficial in cases where you use [Site Level Access \[pg:0092\]](#) and you want each applicant to be assigned to a certain Site. Or it could be used if your organization holds a festival or fundraiser in addition to your regular activities. In this case, you may want to recruit new volunteers who only serve at the special event. If the special event's Assignments were all under a Site, you could make an application form for the event and only place the event's Assignments in the Assignment Preference field.

You can do this by selecting the *Site Selection* link on the [Application Form Setup \[pg:1334\]](#) page. Then use the *This application is for this Site only* section to limit the application to just one Site. [Help topic 1054 \[pg:1338\]](#) has more information on this.

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## How can I enter phone number extensions?

Help topic 2076

Added or revised 01-03-2012

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For organizations in the U.S. and Canada, the default formatting for phone number fields requires that the number entered in the field be a 7 or 10 digit number (a local phone number is 7 digits, and a local phone number plus area code is 10 digits). However you can easily change this default phone number field formatting so that anything is allowed in the field, including phone numbers that are followed by an extension number.

To do this:

1. Choose Setup from the [menu \[pg:0215\]](#).
2. Select 'Field Options.'
3. Select 'Core tab.'

4. Click on the kind of phone number for which you want to change the field formatting requirements (e.g. 'Work.'). This opens the Field Properties page.
5. Change the "Phone number format" to 'No formatting.'
6. Click the **Save** button.

Now you can enter anything – including phone numbers followed by an extension number – in this phone number field.

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## Date of Birth Field Properties Setup Page

Help topic 2077

Added or revised 05-26-2016

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You can use the Date of birth field properties setup page to configure the Date of birth field on the Profile tab in the volunteer record. To get to the Date of birth field properties setup page, choose [Setup \[pg:0887\]](#) from the [menu \[pg:0215\]](#), click on *Field options, Profile tab (for volunteers)*, and then choose *Date of birth*.

### Field location:

This section indicates where the Date of birth field you are working with is located. In this case, the field is on the volunteer Profile tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that this is a Date of birth field.

### Field name:

This is the first place on the Date of birth Field Properties setup page where a [System Operator \[pg:0065\]](#) can make any adjustments to the field. The field is called "Date of birth" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

No

"No" must be selected in order for System Operators to see this field and the information it contains on the Profile tab of the volunteer record.

Yes

If you do not want System Operators to be able to view the Date of birth field on the Profile tab of the volunteer record, you can select "Yes" from the dropdown list. When a field is hidden, System Operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

### Require an entry:

No

If you select "No" it will be possible for the Date of birth field on the Profile tab to be left blank in Volgistics.

Yes

If you select "Yes," and the field is blank when a System Operator tries to save changes on the Profile tab, an error message will pop-up indicating information must be entered. The operator will need to enter a date of birth before they can save the page.

### **System Operator rights**

This section determines what rights operators with different levels have for the field. You can learn more about operator levels in the *User level* section of help topic 1011 [here \[\\_\\_\\_\\_\\_\]](#).

#### Volgistics Administrators

##### *View and change*

Select this option to permit operators designated as Volgistics Administrators to view and edit this field.

##### *View only*

Select this option to permit operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

##### *Hidden*

Select this option to prevent operators designated as Volgistics Administrators from both editing and viewing this field.

#### Power users

##### *View and change*

Select this option to permit operators designated as Power users to view and edit this field.

##### *View only*

Select this option to permit operators designated as Power users to view this field, but to prevent them from making any changes to it.

##### *Hidden*

Select this option to prevent operators designated as Power users from both editing and viewing this field.

#### Basic users

##### *View and change*

Select this option to permit operators designated as Basic users to view and edit this field.

##### *View only*

Select this option to permit operators designated as Basic users to view this field, but to prevent them from making any changes to it.

*Hidden*

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## Age Field Properties Setup Page

Help topic 2078

Added or revised 10-28-2008

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You can use the Age field properties setup page to configure the Age field on the Profile tab in the volunteer record. To get to the Age field properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Profile tab (for volunteers), and then choose Age.

### Field location:

This section indicates where the Age field you are working with is located. In this case, the field is on the Profile tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that this is an Age field.

### Field name:

This is the first place on the Age Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Age" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

*No*

"No" must be selected in order for system operators to see this field and the information it contains on the Profile tab of the volunteer record.

*Yes*

If you do not want system operators to be able to view the Age field on the Profile tab of the volunteer record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

### Require an entry:

*No*

If you select "No" it will be possible for the Age field on the Profile tab to be left blank in Volgistics, as well as at VIC.

*At VIC*

This selection requires that users always enter an Age in the Age field at VIC, but system operators working within Volgistics will not be forced to enter information in this field.

*Always*

If you select "Always" it will not be possible for the Age field on the Profile tab to be left blank in Volgistics, or at VIC.

### **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

#### Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

#### Power users

*View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

*View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

#### Basic users

*View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

*View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

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## Spare Dropdown Field Properties Setup Page

Help topic 2079

Added or revised 10-28-2008

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You can use the Spare dropdown field properties setup page to configure a Spare dropdown field on the Profile tab in the volunteer record. To get to the Spare dropdown field properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Profile tab (for volunteers), and then choose the Spare dropdown field of interest.

### Field location:

This section indicates where the Spare dropdown field you are working with is located. In this case, the field is on the Profile tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Spare dropdown field is a Dropdown field.

### Field name:

This is the first place on the Spare dropdown Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Spare dropdown" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

No

"No" must be selected in order for system operators to see this field and the information it contains on the Profile tab of the volunteer record.

Yes

If you do not want system operators to be able to view this Spare dropdown field on the Profile tab of the volunteer record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

### Require an entry:

No

If you select "No" it will be possible for the Spare dropdown field on the Profile tab to be left blank in Volgistics, as well as at VIC.

At VIC

This selection requires that users always enter information in this Spare dropdown field at VIC, but system operators working within Volgistics will not be forced to enter information in this field.

### *Always*

If you select "Always" it will not be possible for the Spare dropdown field on the Profile tab to be left blank in Volgistics, or at VIC.

### Default entry:

If you want a certain drop down item to appear in this field by default, you can select it here.

### **Drop down table items**

#### *Add a new item:*

This is where a system operator enters the possible options for this drop down field. Each time you enter a new item and click the **Save** button, an additional "Add a new item:" field will be created so that you can continue to add drop down items for this field. If you no longer want to use a particular drop down item, click the **Delete** button next to the field containing that item.

### **System operator rights**

This section determines which types of [system operators \[pg:1895\]](#) can view, or view and change, this field in Volgistics.

#### Volgistics Administrators

##### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

##### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

##### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

#### Power users

##### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

##### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

### *Hidden*

---

## **Spare Field Field Properties Setup Page**

Help topic 2080

Added or revised 10-28-2008

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You can use the Spare field field properties setup page to configure a Spare field on the Profile tab in the volunteer record. To get to the Spare field setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Profile tab (for volunteers), and then choose the Spare field of interest.

### Field location:

This section indicates where the Spare field you are working with is located. In this case, the field is on the Profile tab.

### Field format:

Information is stored in several types of fields in Volgistics. This section indicates that the Spare field can be customized to take the form any one of the following field types: Text; Date; Number (whole); Number (1 decimal place); Number (2 decimal places), or currency. Select the field type of interest from the Field format dropdown list.

### Field name:

This is the first place on the Spare Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Spare field" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

*No*

"No" must be selected in order for system operators to see this field and the information it contains on the Profile tab of the volunteer record.



Yes

If you do not want system operators to be able to view this Spare field on the Profile tab of the volunteer record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

Require an entry:

No

If you select "No" it will be possible for this field on the Profile tab to be left blank in Volgistics, as well as at VIC.

*At VIC*

This selection requires that users always enter information in this Spare field at VIC, but system operators working within Volgistics will not be forced to enter information in this field.

*Always*

If you select "Always" it will not be possible for this Spare field on the Profile tab to be left blank in Volgistics, or at VIC.

Default entry:

If you want certain information to appear in this field by default, you can enter it here.

### **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

Power users

*View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

#### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

---

## **Spare Checkbox Field Properties Setup Page**

Help topic 2081

Added or revised 10-28-2008

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You can use the Spare checkbox Field properties setup page to configure a Spare checkbox on the Profile tab in the volunteer record. To get to the Spare checkbox Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Profile tab (for volunteers), and then choose the Spare checkbox of interest.

#### Field location:

This section indicates where the Spare checkbox you are working with is located. In this case, the checkbox is on the Profile tab.

#### Field format:

Information is stored in several types of fields in Volgistics. This section indicates that the Spare checkbox is a Checkbox field.

#### Field name:

This is the first place on the Spare Checkbox Properties setup page where a system operator can make any adjustments to the field. The checkbox is called "Spare checkbox" by default. To change the name of the checkbox, delete the text from this field and enter the name you would like to change the checkbox to.

Hidden:

No

"No" must be selected in order for system operators to see this checkbox and the information it contains on the Profile tab of the volunteer record.

Yes

If you do not want system operators to be able to view this Spare checkbox on the Profile tab of the volunteer record, you can select "Yes" from the drop down list. When a checkbox is hidden, System operators will not see the checkbox or whether or not it was marked before the field was made hidden, but if the checkbox was marked before it was hidden, it will still be marked if you later unhide the checkbox.

Default entry:

If you want this checkbox to be checked by default, you can check the box here.

**System operator rights**

This section determines which types of [system operators \[pg:1895\]](#) can view, or view and change, this field in Volgistics.

Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

Power users

*View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

*View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

#### Basic users

##### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

##### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

##### *Hidden*

---

## Daily Availability Field Properties Setup Page

Help topic 2082

Added or revised 10-28-2008

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You can use the Daily availability field properties setup page to configure the Daily availability section on the Profile tab in the volunteer record. To get to the volunteer Profile tab Daily availability field properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Profile tab, and then choose Daily Availability.

### Daily Availability

Use the following options to decide how you want to track volunteer availability (the times individual volunteers are generally available to serve) in Volgistics.

#### *Do not track daily availability*

Select this option if you do not want to track daily volunteer availability. Note that if you choose this option, you will not be able to create a [Set \[pg:0859\]](#) based on daily availability.

#### *Track daily availability on an ongoing basis*

Choose this option if you would like the daily availability information entered in this section of the volunteer Profile tab to reflect the volunteer's availability indefinitely, starting from the time it is entered.

#### *Track daily availability for these dates only:*

Choose this option if you want to indicate your volunteers' daily availability for a specified period of dates. This is useful when you want to track daily availability for a special event or season. If you select this option, you should enter a beginning and ending date to indicate the period of time for which you would like to track daily availability.

#### Track availability for these days of the week

Choose this option if you want to track availability for one or more days of the week. For example, you might want to track daily availability for weekends only. In this case, you would mark the boxes next to Sundays and Saturdays only.

## Track daily availability using

### *Actual times*

If you choose to track daily availability using actual times, dropdown fields will be provided in the Availability section of the volunteer Profile tab to indicate "From" and "To" times for volunteer availability on specific days of the week.

### *These pre-set intervals*

Select this option if you want volunteers to indicate their availability based on pre-set intervals. When this option is chosen, you can customize up to eight intervals. You can enter whatever type of categories make sense for your organization, such as "morning," "afternoon" and "evening," or more specific time ranges, such as "8:00 am – 12:00 pm." The pre-set intervals will show up on the Profile tab in the volunteer record as checkboxes under specific days of the week.

## Clear availability

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# My Availability Is Field Properties Setup Page

Help topic 2083

Added or revised 10-28-2008

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You can use the "My availability is" field properties setup page to configure the My availability is section on the Profile tab in the volunteer record. To get to the volunteer Profile tab "My availability is" field properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Profile tab, and then choose "My availability is."

### Field location:

This section indicates where the "My availability is" field you are working with is located. In this case, the field is on the Profile tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the "My availability is" field is a Dropdown field.

### Field name:

This is the first place on the "My availability is" setup page where a system operator can make any adjustments to the field. The field is called "My availability is" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

No

"No" must be selected in order for system operators to see this field and the information it contains on the Profile tab of the volunteer record.

Yes

If you do not want system operators to be able to view the "My availability is" field on the Profile tab of the volunteer record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

Require an entry:

No

If you select "No" it will be possible for the "My availability is" field on the Profile tab to be left blank in Volgistics, as well as at VIC.

At VIC

This selection requires that users always enter information in this "My availability is" field at VIC, but system operators working within Volgistics will not be forced to enter information in this field.

Always

If you select "Always" it will not be possible for the "My availability is" field on the Profile tab to be left blank in Volgistics, or at VIC.

Default entry:

If you want a certain drop down item to appear in this field by default, you can select it here. For example, if all or most of your organization's volunteers have "Ongoing" availability, you can choose "Ongoing" as the default so that you can pass by this field when creating a new volunteer record.

### **Drop down table items**

*Add a new item:*

This is where a system operator enters the possible options for this drop down field. For this field, options such as "Ongoing," "Ongoing except between these dates," and "Only between these dates" are used to indicate a volunteer's availability.

Each time you enter a new item and click the **Save** button, an additional "Add a new item:" field will be created so that you can continue to add drop down items for this field. If you no longer want to use a particular drop down item, click the **Delete** button next to the field containing that item.

### **System operator rights**

This section determines which types of [system operators \[pg:1895\]](#) can view, or view and change, this field in Volgistics.

Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

### Power users

#### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

### *Hidden*

---

## **From Field Properties Setup Page**

Help topic 2084

Added or revised 10-28-2008

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You can use the From field properties setup page to configure the From field in the Availability section on the Profile tab in the volunteer record. To get to the From field properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Profile tab (for volunteers), and then choose From.

### Field location:

This section indicates where the From field you are working with is located. In this case, the field is on the Profile tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the From field is a Date field.

### Field name:

This is the first place on the From Field Properties setup page where a system operator can make any adjustments to the field. The field is called "From" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

*No*

"No" must be selected in order for system operators to see this field and the information it contains on the Profile tab of the volunteer record.

*Yes*

If you do not want system operators to be able to view the From field on the Profile tab of the volunteer record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

### Require an entry:

*No*

If you select "No" it will be possible for the From field on the Profile tab to be left blank in Volgistics, as well as at VIC.

*At VIC*

This selection requires that users always enter a date in the From field at VIC, but system operators working within Volgistics will not be forced to enter information in this field.

*Always*

If you select "Always" it will not be possible for the From field on the Profile tab to be left blank in Volgistics, or at VIC.

## **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

### Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.



### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

### Power users

#### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

### *Hidden*

---

## **To Field Properties Setup Page**

Help topic 2085

Added or revised 10-28-2008

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You can use the To field properties setup page to configure the To field in the Availability section on the Profile tab in the volunteer record. To get to the To field properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Profile tab (for volunteers), and then choose To.

Field location:

This section indicates where the To field you are working with is located. In this case, the field is on the Profile tab.

Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the To field is a Date field.

Field name:

This is the first place on the To Field Properties setup page where a system operator can make any adjustments to the field. The field is called "To" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

Hidden:

*No*

"No" must be selected in order for system operators to see this field and the information it contains on the Profile tab of the volunteer record.

*Yes*

If you do not want system operators to be able to view the To field on the Profile tab of the volunteer record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

Require an entry:

*No*

If you select "No" it will be possible for the To field on the Profile tab to be left blank in Volgistics, as well as at VIC.

*At VIC*

This selection requires that users always enter a date in the To field at VIC, but system operators working within Volgistics will not be forced to enter information in this field.

*Always*

If you select "Always" it will not be possible for the To field on the Profile tab to be left blank in Volgistics, or at VIC.

**System operator rights**

This section determines which types of [system operators \[pg:1895\]](#) can view, or view and change, this field in Volgistics.

Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

Power users

*View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

*View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

Basic users

*View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

*View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

*Hidden*

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## **I Would Like To Serve Up To Field Properties Setup Page**

Help topic 2086

Added or revised 10-28-2008

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You can use the "I would like to serve up to" Field Properties setup page to configure the "I would like to serve up to" field on the Profile tab in the volunteer record. To get to the Profile tab "I would like to serve up to setup page," choose Setup from the [menu \[pg:0215\]](#), click on Field options, Profile tab, and then choose "I would like to serve up to."

### Field location:

This section indicates where the "I would like to serve up to" field you are working with is located. In this case, the field is on the Profile tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the "I would like to serve up to" field is a whole number field.

### Field name:

This is the first place on the "I would like to serve up to" Field Properties setup page where a system operator can make any adjustments to the field. The field is called "I would like to serve up to" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

*No*

"No" is the default option here. "No" must be selected in order for system operators to see this field and the information it contains on the Profile tab of the volunteer record.

*Yes*

If you do not want system operators to be able to view the "I would like to serve up to" field on the Profile tab of the volunteer record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

### Require an entry:

*No*

If you select "No" it will be possible for the "I would like to serve up to" field on the Profile tab to be left blank in Volgistics, as well as at VIC.

*At VIC*

This selection requires that users always enter information in the "I would like to serve up to" field at VIC, but system operators working within Volgistics will not be forced to enter a number in this field.

*Always*

If you select "Always" it will not be possible for the "I would like to serve up to" field on the Profile tab to be left blank in Volgistics, or at VIC.

### Default entry:

If you want a certain drop down item to appear in this field by default, you can select it here.

## **System operator rights**

This section determines which types of [system operators \[pg:1895\]](#) can view, or view and change, this field in Volgistics.

#### Volgistics Administrators

##### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

##### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

##### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

#### Power users

##### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

##### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

##### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

#### Basic users

##### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

##### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

##### *Hidden*

---

## Hours Field Properties Setup Page

Help topic 2087

Added or revised 10-28-2008

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You can use the Hours Field Properties setup page to configure the Hours field on the Profile tab in the volunteer record. To get to the Profile tab Hours Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Profile tab, and then choose Hours.

### Field location:

This section indicates where the Hours field you are working with is located. In this case, the field is on the Profile tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Hours field is a Dropdown field.

### Field name:

This is the first place on the Hours Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Hours" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

*No*

"No" must be selected in order for system operators to see this field and the information it contains on the Profile tab of the volunteer record.

*Yes*

If you do not want system operators to be able to view the Hours field on the Profile tab of the volunteer record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

### Require an entry:

*No*

If you select "No" it will be possible for the Hours field on the Profile tab to be left blank in Volgistics, as well as at VIC.

*At VIC*

This selection requires that users always enter information in this Hours field at VIC, but system operators working within Volgistics will not be forced to enter information in this field.

*Always*

If you select "Always" it will not be possible for the Hours field on the Profile tab to be left blank in Volgistics, or at VIC.

#### Default entry:

If you want a certain drop down item to appear in this field by default, you can select it here.

#### **Drop down table items**

##### *Add a new item:*

This is where a system operator enters the possible options for this drop down field. Each time you enter a new item and click the **Save** button, an additional "Add a new item:" field will be created so that you can continue to add drop down items for this field. If you no longer want to use a particular drop down item, click the **Delete** button next to the field containing that item.

Note that this field is intended to be used in conjunction with the other daily availability fields, particularly the "I would like to serve up to" field [pg:0986]. While the "I would like to serve up to" field is where volunteers indicate the maximum number of hours they would like to serve, the "Hours" field allows volunteers to refine their daily availability by stating the time period in which they are able to fulfill the number of hours indicated in the "I would like to serve up to" field. For example, they can use the drop down table items to state that they are available to serve the specified number of hours "Daily," "Monthly," "Weekly," etc.

#### **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

##### Volgistics Administrators

###### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

###### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

###### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

##### Power users

###### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

###### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

Basic users

*View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

*View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

*Hidden*

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## Assignment Preference Field Setup Page

Help topic 2088

Added or revised 02-21-2014

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You can use the Assignment Preference Field Setup page to configure the Assignment Preference field on the Profile tab in the volunteer record. To get to the Assignment Preference Field Setup page, choose [Setup \[pg:0887\]](#) from the [menu \[pg:0215\]](#), click on *Field options, Profile tab (for volunteers)*, and then choose *Assignment Preference*.

Field location:

This section indicates where the Assignment Preference field you are working with is located. In this case, the field is on the Profile tab.

Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that this is a Preference field.

Preference name:

This is the first place on the Assignment Preference Field Properties setup page where a [System Operator \[pg:0065\]](#) can make any adjustments to the field. The field is called "Assignment Preference" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

You can choose:

This dropdown field allows users to decide how many Assignments volunteers should be allowed to choose when indicating their Assignment Preferences.



### Rank by:

If volunteers are permitted to choose more than one Assignment Preference, this field allows users to determine whether or not volunteers can rank their Assignment Preferences, and if so, whether they should rank Assignment preferences by "1st, 2nd and 3rd choice" or by "Importance."

### Offer:

Use this dropdown menu to decide which Assignments constitute the pool from which volunteers can select their Assignment preferences. You can choose to let volunteers indicate Assignment Preferences for "All Assignments," "Active Assignments only," or "**Advertised Assignments only.**" [pg:0967]

### **Volunteers choose their preference of...**

Assignment preferences can be set up to allow volunteers to indicate their preference for any one of the following options:

#### *Site*

Choose Site to let volunteers indicate the Site(s) at which they would prefer to serve.

#### *Place*

Choose Place to let volunteers indicate the Place(s) at which they would prefer to serve.

#### *Assignment*

Choose Assignment to let volunteers indicate the Assignment(s) in which they would prefer to serve. If you select Assignment, you can optionally mark the checkbox next to "**Add assignment records automatically**" [pg:0906] and then determine which **Role** [pg:0103] should be given to volunteers receiving Assignment records automatically.

#### *Cluster*

Choose **Cluster** [pg:0934] to let volunteers indicate the Cluster(s) in which they would prefer to serve.

### **System Operator rights**

This section determines which types of **System Operators** [pg:0065] can view, view and change, or see this field in Volgistics.

#### Volgistics Administrators

##### *View and change*

Select this option to permit System Operators designated as **Volgistics Administrators** [pg:0052] to view and edit this field.

##### *View*

Select this option to permit System Operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent System Operators designated as Volgistics Administrators from both editing and viewing this field.

### Power users

#### *View and change*

Select this option to permit System Operators designated as Power users to view and edit this field.

#### *View*

Select this option to permit System Operators designated as Power users to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent System Operators designated as Power users from both editing and viewing this field.

### Basic users

#### *View and change*

Select this option to permit System Operators designated as Basic users to view and edit this field.

#### *View*

Select this option to permit System Operators designated as Basic users to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent System Operators designated as Basic users from both editing and viewing this field.

---

## **Preference Field Setup Page**

Help topic 2089

Added or revised 10-28-2008

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You can use the Preference field setup page to configure a preference field on the Profile tab in the volunteer record. To get to the preference field setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Profile tab (for volunteers), and then choose Add a new preference.

### Field location:

This section indicates where the preference field you are working with is located. In this case, the field is on the Profile tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that this is a Preference field.

### Preference name:

This is the first place on the Preference Field Properties setup page where a system operator can make any adjustments to the field. Enter the name you would like give this Preference field in the Preference name field.

### You can choose:

This dropdown field allows users to decide how many items volunteers should be allowed to choose when indicating their preference.

### Rank by:

If volunteers are permitted to choose more than one preference for this field, users are allowed to determine whether or not volunteers can rank their preferences, and if so, whether they should rank preferences by "1st, 2nd and 3rd choice" or by "Importance."

### Offer:

Use this dropdown menu to decide which Assignments constitute the pool from which volunteers can select their preferences. You can choose to let volunteers indicate preferences for "All Assignments," "Active Assignments only," or "**Advertised Assignments only.**" [pg:0967]

## **Volunteers choose their preference of...**

Preferences can be set up to allow volunteers to indicate their preference for any one of the following options:

### *Site*

Choose Site to let volunteers indicate the Site(s) at which they would prefer to serve.

### *Place*

Choose Place to let volunteers indicate the Place(s) at which they would prefer to serve.

### *Assignment*

Choose Assignment to let volunteers indicate the Assignment(s) in which they would prefer to serve. If you select Assignment, you can optionally mark the checkbox next to "**Add assignment records automatically**" [pg:0906] and then determine which **Role** [pg:0103] should be given to volunteers receiving Assignment records automatically.

### *Cluster*

Choose **Cluster** [pg:0934] to let volunteers indicate the Cluster(s) in which they would prefer to serve.

## **System operator rights**

This section determines which types of [system operators \[pg:1895\]](#) can view, or view and change, this field in Volgistics.

#### Volgistics Administrators

##### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

##### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

##### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

#### Power users

##### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

##### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

##### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

#### Basic users

##### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

##### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

##### *Hidden*

---

## Assignment Field Properties Setup Page

Help topic 2090

Added or revised 10-29-2008

---

You can use the Assignment Field properties setup page to configure the Assignment field in the Assignment box on the Service tab in the volunteer record. To get to the Assignment Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Service tab, and then choose Assignment under Assignment box.

### Field location:

This section indicates where the Assignment field you are working with is located. In this case, the Assignment is on the Service tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Assignment field is an Assignment list field. Note that this is a "system field," and as such you cannot customize certain field characteristics, including the field name.

### *Include as a grid column*

Mark this checkbox if you would like the Assignment to be listed in a column within the Assignments box on the volunteer Service tab.

## **System operator rights**

This section determines which types of [system operators \[pg:1895\]](#) can view, or view and change, this field in Volgistics.

### Volgistics Administrators

#### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

#### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

### Power users

#### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

#### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

---

## **From Field Setup Page**

Help topic 2092

Added or revised 10-30-2008

---

You can use the From field setup page to configure the From field in the Assignment box on the Service tab in the volunteer record. To get to the From field setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Service tab, and then choose From under the Assignment box.

#### Field location:

This section indicates where the From field you are working with is located. In this case, the field is on the Service tab.

#### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that this is a Date field.

#### Field name:

This is the first place on the From Field Properties setup page where a system operator can make any adjustments to the field. The field is called "From" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

#### Hidden:

No

"No" must be selected in order for system operators to see this field and the information it contains on the Service tab of the volunteer record.

Yes

If you do not want system operators to be able to view the From field on the Service tab of the volunteer record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

Require an entry:

No

If you select "No" it will be possible for the From field on the Service tab to be left blank in Volgistics, as well as at VIC.

Always

If you select "Always" it will not be possible for the From field on the Service tab to be left blank in Volgistics, or at VIC.

Default entry:

If you want a certain date to appear in this field by default, you can enter it here.

*Include as a grid column:*

If you want the From field to appear as a column in the Assignment box on the Service tab, mark this box.

### **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

## Power users

### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

## Basic users

### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

### *Hidden*

---

## **To Field Properties Setup Page**

Help topic 2093

Added or revised 10-31-2008

---

You can use the To field properties setup page to configure the To field in the Assignments box on the Service tab in the volunteer record. To get to the To field properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Service tab, and then choose To under Assignment box.

### Field location:

This section indicates where the To field you are working with is located. In this case, the field is on the Service tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that this is a Date field.

### Field name:

This is the first place on the To Field Properties setup page where a system operator can make any adjustments to the field. The field is called "To" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.



Hidden:

*No*

"No" must be selected in order for system operators to see this field and the information it contains on the Service tab of the volunteer record.

*Yes*

If you do not want system operators to be able to view the To field on the Service tab of the volunteer record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

Require an entry:

*No*

If you select "No" it will be possible for the To field on the Service tab to be left blank in Volgistics, as well as at VIC.

*Always*

If you select "Always" it will not be possible for the To field on the Service tab to be left blank in Volgistics, or at VIC.

Default entry:

If you want a certain date to appear in this field by default, you can enter it here.

*Include as a grid column:*

Mark this checkbox if you would like the To date to be listed in a column within the Assignments box on the volunteer Service tab.

**System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

#### Power users

##### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

##### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

##### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

#### Basic users

##### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

##### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

##### *Hidden*

---

## **Spare Date Field Properties Setup Page**

Help topic 2094

Added or revised 10-31-2008

---

You can use the Spare date field properties setup page to configure a Spare date field on the Service tab in the volunteer record. To get to the Spare date field setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Service tab, and then choose the Spare date field under the Assignment box.

#### Field location:

This section indicates where the Spare date field you are working with is located. In this case, the field is on the Service tab.

#### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Spare date field is a Date field.

Field name:

This is the first place on the Spare Field Properties setup page where a system operator can make any adjustments to the field. Use the Field name field to give your spare date field a name.

Hidden:

No

"No" must be selected in order for system operators to see this field and the information it contains on the Service tab of the volunteer record.

Yes

If you do not want system operators to be able to view this Spare date field on the Service tab of the volunteer record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

Require an entry:

No

If you select "No" it will be possible for this field on the Service tab to be left blank in Volgistics, as well as at VIC.

Always

If you select "Always" it will not be possible for this Spare date field on the Service tab to be left blank in Volgistics, or at VIC.

Default entry:

If you want a certain date to appear in this field by default, you can enter it here.

*Include as a grid column*

Mark this checkbox if you would like the spare date field to be listed in a column within the Assignments box on the volunteer Service tab.

**System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

Power users

*View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

*View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

Basic users

*View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

*View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

*Hidden*

---

## **Spare Dropdown Field Properties Setup Page**

Help topic 2095

Added or revised 10-31-2008

---

You can use the Spare dropdown field setup page to configure a Spare dropdown field in the Assignments box on the Service tab in the volunteer record. To get to the Spare dropdown field setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Service tab, and then choose the Spare dropdown field under the Assignment box heading.

Field location:

This section indicates where the Spare dropdown field you are working with is located. In this case, the field is on the Service tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Spare dropdown field is a Dropdown field.

### Field name:

This is the first place on the Spare dropdown Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Spare dropdown" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

*No*

"No" must be selected in order for system operators to see this field and the information it contains on the Service tab of the volunteer record.

*Yes*

If you do not want system operators to be able to view the Spare dropdown field on the Service tab of the volunteer record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

### Default entry:

If you want a certain drop down item to appear in this field by default, you can select it here.

### *Include as a grid column*

Mark this checkbox if you would like the spare dropdown field to be listed in a column within the Assignments box on the volunteer Service tab.

### **Drop down table items**

#### *Add a new item:*

This is where a system operator enters the possible options for this drop down field. Each time you enter a new item and click the **Save** button, an additional "Add a new item:" field will be created so that you can continue to add drop down items for this field. If you no longer want to use a particular drop down item, click the **Delete** button next to the field containing that item.

### **System operator rights**

This section determines which types of [system operators \[pg:1895\]](#) can view, or view and change, this field in Volgistics.

### Volgistics Administrators

#### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

#### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

#### Power users

#### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

#### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

---

## **Spare Checkbox Field Properties Setup Page**

Help topic 2096

Added or revised 10-31-2008

---

You can use the Spare checkbox setup page to configure a Spare checkbox in the Assignments box on the Service tab in the volunteer record. To get to the Spare checkbox setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Service tab, and then choose the Spare checkbox under the Assignment box heading.

Field location:

This section indicates where the Spare checkbox you are working with is located. In this case, the checkbox is on the Service tab.

Field format:

Information is stored in several types of fields in Volgistics. This section indicates that the Spare checkbox is a Checkbox field.

Field name:

This is the first place on the Spare Checkbox Properties setup page where a system operator can make any adjustments to the field. The checkbox is called "Spare checkbox" by default. To change the name of the checkbox, delete the text from this field and enter the name you would like to change the checkbox to.

Hidden:

*No*

"No" must be selected in order for system operators to see this checkbox and the information it contains on the Service tab of the volunteer record.

*Yes*

If you do not want system operators to be able to view this Spare checkbox on the Service tab of the volunteer record, you can select "Yes" from the drop down list. When a checkbox is hidden, System operators will not see the checkbox or whether or not it was marked before the field was made hidden, but if the checkbox was marked before it was hidden, it will still be marked if you later unhide the checkbox.

Default entry:

*Checked*

If you want this checkbox to be checked by default, you can check the box here.

*Include as a grid column*

Mark this checkbox if you would like the spare checkbox field to be listed in a column within the Assignments box on the volunteer Service tab.

**System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

Power users

*View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

*View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

Basic users

*View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

*View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

*Hidden*

---

## Assignment Field Properties Setup Page

Help topic 2097

Added or revised 10-31-2008

---

You can use the Assignment Field properties setup page to configure the Assignment field in the Service box on the Service tab in the volunteer record. To get to the Assignment Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Service tab, and then choose Assignment under Service box.

Field location:

This section indicates where the Assignment field you are working with is located. In this case, the Assignment is on the Service tab.



### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Assignment field is an Assignment list field. Note that this is a "system field," and as such you cannot customize certain field characteristics, including the field name.

### Require an entry:

*No*

If you select "No" it will be possible for the Assignment field in the Service box on the Service tab to be left blank in Volgistics, as well as at VIC.

*Always*

If you select "Always" it will not be possible for the Assignment field in the Service box on the Service tab to be left blank in Volgistics, or at VIC.

*Include as a grid column*

Mark this checkbox if you would like the Assignment to be listed in a column within the Service box on the volunteer Service tab.

## **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

### Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

### Power users

*View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

*View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

Basic users

*View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

*View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

*Hidden*

---

## From Time Field Properties Setup Page

Help topic 2098

Added or revised 10-30-2008

---

You can use the From time field properties setup page to configure the From time field in the Service box on the Service tab in the volunteer record. To get to the From time field setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Service tab, and then choose From time under Service box.

Field location:

This section indicates where the From time field you are working with is located. In this case, the field is on the Service tab.

Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that this is a Time field.

Require an entry:

*No*

If you select "No" it will be possible for the From time field on the Service tab to be left blank in Volgistics, as well as at VIC.

*Always*

If you select "Always" it will not be possible for the From time field on the Service tab to be left blank in Volgistics, or at VIC.

*Include as a grid column:*

If you want the From time to appear as a column in the Service box on the Service tab, mark this box.

## **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

### Volgistics Administrators

#### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

#### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

### Power users

#### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

---

## Preference Fields

Help topic 2130

Added or revised 01-07-2015

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Preference fields are powerful, customizable fields for collecting information about the assignment(s) – or kind of assignment(s) – volunteers or applicants are most interested in. Volgistics uses preference fields to help you match volunteers and assignments.

Here are some examples of the different ways you can use preference fields:

- To list assignments by name so volunteers or applicants can choose the assignments that appeal the most to them.
- To list the different Sites or Places that have assignments so volunteers or applicants can choose the location that most appeals to them. For example, a volunteer center can use a preference field to ask a prospective volunteer to choose the organization where they would like to serve. Or, a multi-county agency can ask applicants which county they would like to serve in.
- To ask volunteers or applicants to indicate their preference for assignment characteristics such as these:

- Assignment duration (e.g. one time or ongoing)
- Type of service performed (e.g. tutoring, clerical, fund raising, etc).
- If use of their personal vehicle is required
- Degree of interaction with others (e.g. work alone, work with others, etc.)

While your Volgistics system may come with one or two preference fields already setup, you can create up to twenty preference fields to suit your own needs. When you create new preference fields you give the field a name (e.g. 'Type of service performed') and establish the options that are available to volunteers (e.g. 'one time,' 'ongoing'). When you setup preference fields you can also choose if volunteers should...

- simply check their preference(s)
- rank their preferences in order of choice (e.g. 1st, 2nd, 3rd choice)
- rank their preferences in order of importance to them

To setup a new preference field:

1. From the [menu \[pg:0215\]](#), choose 'Setup'
2. Select 'Field options.'
3. Click 'Profile tab (for volunteers)'
4. Scroll down to choose 'Add a new preference.'
5. Complete the [Field Properties \[pg:0585\]](#) window.
6. Click the **Save** button on the 'Field Properties' window.

You can use preference fields:

- On volunteer application forms so new applicants can tell you their preferences.
  - With a Volunteer Information Center option (VicNet or VicTouch) so volunteers can update their preferences online or at an on-site kiosk.
  - Manually by entering or editing a volunteers preferences on the Profile tab in their volunteer record.
- No matter how you choose to collect volunteer preference information, you can always view or edit a volunteer's preference on the Profile tab in their volunteer record.

If you have a preference field that asks applicants to rank their choice, the field will appear similar to this on the application form...

### Assignment Preference

The following volunteer assignments may currently be available. Please choose your first, second, and third assignment preference.

Assignment Preference:

1st choice:	<input type="text" value="Transportation Driver (Client Services)"/>
2nd choice:	<input type="text" value="Info Desk (Administration)"/>
3rd choice:	<input type="text" value="Choose"/>

If you have a preference field that asks applicants to describe the importance of a preference, the field will appear similar to this on the application form...

### Assignment Preference

Please tell us how important each of the following volunteer assignment characteristics are to you.

Time commitment:	Must be	Very important	Somewhat important	Does not matter to me	Must not be
One time :	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ongoing:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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## Setting Tab Rights

Help topic 2154

Added or revised 04-03-2017

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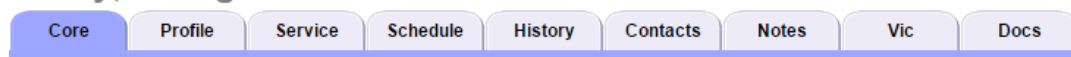
Volgistics helps you keep your volunteer information organized by arranging it onto nine different [tabs \[pg:1849\]](#) in the volunteer record. Each tab includes a specific kind of volunteer information. For example, the Service tab includes the volunteer's current and past service information.

The nine possible tabs in the volunteer record are:

- Core
- Profile
- Service
- Schedule
- History

Contacts  
Notes  
Vic  
Docs

## Bailey, George



Volgistics allows you to control which of these tabs individual system operators can see and use when they login to the system. This capability is useful for:

- Hiding tabs you do not currently use at all in your organization so they don't get in the way.
- Preventing individual [System Operators \[pg:0065\]](#) from seeing or changing any of the information on a particular kind of tab.

You control tab rights by specifying which of these tabs a system operator can see, depending on their *user level*. There are three *user levels* in Volgistics:

Volgistics Administrators  
Power Users  
Basic Users

Every Volgistics System Operator has one of these three *user levels*. The account's [Volgistics Administrator \[pg:0052\]](#) determines a System Operator's user level by selecting [Setup \[pg:0887\]](#) from the menu, expanding the *System operators* link, clicking on an operator's name, and selecting a user level from the *User level* dropdown field.

To prevent operators with a certain user level from accessing a tab, the Administrator can follow these steps:

1. Choose Setup from the [menu \[pg:0215\]](#).
2. Select *Field Options*.
3. Select the tab you want to block (note that you cannot block the Core tab, or tabs in records other than volunteer records). If the tab you want to block is the Docs tab, see the *Docs tab* information box below.
4. Click the [Tab Rights \[pg:0933\]](#) link.
5. Set the tab rights, and then click the **Save** button.

### Docs Tab

The [Docs tab \[pg:1630\]](#) of the volunteer record has additional options for tab rights that are not available for other tabs. For information on changing the tab rights for the Docs tab, see [help topic 2553 \[pg:1319\]](#).

When you hide a selected tab for System Operators with a specific user level, those operators will never see the hidden tab when they work with volunteer records. Hidden tabs are hidden in all volunteer records, including [archived \[pg:0709\]](#) volunteer records, for these operators. Hiding a tab does not remove any of the information previously entered on the tab. You can hide a tab, and later un-hide it.

**Please note:**

Hiding a tab does not prevent System Operators from printing reports that may include information from the hidden tab. If you hide a tab for the purpose of preventing some System Operators from seeing sensitive information, be sure none of your reports include that sensitive information (or, prevent these System Operators from printing reports altogether by changing the rights on their [System Operator record \[pg:1895\]](#)).

Don't forget that you can set

*field rights*

too. If you don't want to hide an entire tab, you can set field rights for the individual fields on the tab. In this case, System Operators with the restricted user level would have access to the tab, but not specific to certain fields on the tab. You set field rights under "[Field Options](#)" [\[pg:0957\]](#) in Setup.

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## How do I add a field for tracking volunteer social security numbers?

Help topic 2155

Added or revised 12-18-2013

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**Question:** How do I add a field for tracking volunteer social security numbers?

**Answer:** The Profile tab would be the best place to add a field for tracking social security numbers. To add such a custom field to the Profile tab:

1. Choose [Setup \[pg:0887\]](#) from the [menu \[pg:0215\]](#).
2. Choose *Field Options*.
3. Select *Profile tab (for volunteers)*.
4. Select any of the "Spare fields" that are currently hidden (e.g. Spare field 1, Spare field 2, etc).
5. Make the following changes to the field properties window for the Spare field you selected:
  - For *Field format* choose "Social security number."
  - For *Field name* enter "Social security number" (or whatever you want the field name to be)
  - Set *Hidden* to "No"
  - Set any special [System Operator \[pg:0065\]](#) rights you want for this field. See the *System Operator rights* section of [help topic 2017 \[pg:0957\]](#) for more information on this.
6. Click the **Save** button to save your changes.

Your volunteer Profile tabs will now include a field for a social security number. Most volunteer tabs support a number of custom fields that you can configure through the same steps.

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## Automatic volunteer numbers

Help topic 2247

Added or revised 09-12-2013

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If you use the [volunteer number field \[pg:1856\]](#), and you choose not to assign your own volunteer numbers, Volgistics automatically assigns a number to each new volunteer record you manually enter; receive through an online application form; or import from another database.

By default, Volgistics automatically assigns volunteer numbers that are between 4 and 6 digits long (numbers only), and that are *not* sequential (you'll learn why later in this help topic).

You can optionally change the way Volgistics assigns numbers automatically. To change this setting:

1. Choose Setup from the [menu \[pg:0215\]](#).
2. Select Field Options.
3. Select Core tab.
4. Click on the Number field link. This opens the Field Properties page for the Number field.

Use the "Automatic PIN numbering" selection to change the way numbers are assigned automatically.

5. Click the **Save** button to save your changes.

Three methods of automatic numbering are supported:

### Random

Volgistics automatically assigns a volunteer number that is between 4 and 6 digits long. Numbers are assigned randomly, reducing the possibility that volunteers will have sequential volunteer numbers. This is the default and recommended selection for automatic numbering.

This is the recommended selection for these reasons:

If you use VicTouch, this number becomes the PIN number the volunteer will use to access VicTouch. VicTouch security is significantly reduced if you use sequential numbers because any volunteer can easily determine other volunteer PIN numbers simply by entering the next or previous number in sequence from their own PIN number. Further, if a volunteer makes a mistake entering their own PIN number, it's more likely that their mistaken entry will be another volunteer's PIN. For example, if a volunteer with PIN 1234 inadvertently enters 1342 there is a good chance that the mistaken entry will actually be another volunteer's PIN if sequential numbers are used.

Internally the system can assign numbers faster with this selection, making new record entry slightly faster.

### Home phone

When you choose this option, Volgistics attempts to use the last 7 digits of a volunteer's home phone number as their volunteer number. If no home phone number has been entered for the volunteer, or if another volunteer already has this number, Volgistics assigns a random number that is between 4 and 6 digits long.

### Sequential



Choose this option if you prefer that new volunteer numbers be assigned automatically in a sequential order. With this option selected, Volgistics will automatically assign the next highest unused volunteer number, starting with the lowest number already used. If no volunteer records have previously been added to an account, numbering will begin at 1000. To cause numbering to start with a number less than 1,000 enter the first volunteer record and manually assign that volunteer record the number you wish to start with (by entering the number in the Number field on the Core tab).

If you archive volunteer records, the archived records keep their volunteer number. So a volunteer number will not be reused as long as any volunteer record, archived or not archived, has that number.

This selection is not recommended for organizations that use VicTouch for the reasons described under the "Random" option.

Changing the way volunteer numbers are automatically assigned will not retroactively change the volunteer numbers in any existing volunteer records. The system does not currently provide any method for automatically changing existing volunteer numbers. However you can change existing volunteer numbers by editing the Number field in individual volunteer records.

#### Related help

[Help Topic 2152 \[pg:1856\]](#) - Using volunteer numbers

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## How do I add more States or Provinces to the State or Province dropdown

Help topic 2279

Added or revised 09-12-2013

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The State (Province) field uses a "dropdown list." When you establish a new account, the dropdown list for the State or Province field will contain just your own state or province code.

To add more state or province codes to this list:

1. Choose Setup from the [menu \[pg:0215\]](#).
2. Expand the "Field options" link.
3. Select the "Core tab" (the Core tab is where the State (Province) field is located).
4. Select the "State" or "Province" Field. This opens the Field Properties page for the State or Province field.
5. Type a new state or province entry in the "Add a new item" field.
6. Click the **Save** button beside the field.

Repeat steps 5 and 6 for each new item you want to add to this field's dropdown list.

To add *all* of the state or province codes to this list in a single step:

1. Choose Setup from the [menu \[pg:0215\]](#).

2. Expand the "Field Options" link.
3. Select the "Core tab" (the Core tab is where the State (Province) field is located).
4. Select the "State" or "Province" Field. This opens the Field Properties page for the State or Province field.
5. Click the **Add all U.S. States** or **Add all Canadian Provinces** button located at the bottom of the list.

#### Related help

[Help Topic 2017 \[pg:0957\]](#) - Field Setup

[Help Topic 2018 \[pg:0963\]](#) - Manage Dropdown Lists (Look-up tables)

[Help Topic 2294 \[pg:1868\]](#) - Core Tab

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## Start and Stop Date Rules

Help topic 2314

Added or revised 02-14-2012

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Volgistics tracks volunteer [start and stop dates \[pg:1890\]](#) automatically. By default, a volunteer's start date is the date their status becomes 'active' and their stop date is the date their status becomes 'inactive.' If a volunteer hasn't yet been marked active they will not have a start date, and until they're marked inactive they will not have a stop date. Volunteers who were active at one time, but are now inactive will have both a start date and stop date. These dates appear on the History tab in their volunteer record.

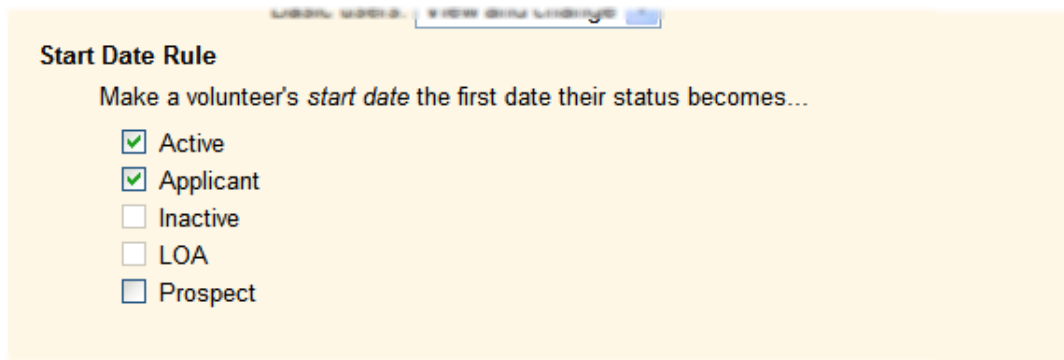
You can customize the way start and stop dates are triggered using the *Start date rule* and the *Stop date rule* under Field Properties in Setup.

#### Start Date Rule

Use the *Start date rule* on the Field Properties page for the Start Date field to customize the volunteer status (or statuses) that should be used as the basis for their start date. If you're not already on the Field Properties page for the Start Date field, you can get there like this:

1. Choose Setup from the menu.
2. Select 'Field Options.'
3. Select 'History tab' (the History tab is where the Start and Stop date fields appear).
4. Click the 'Start Date' link. This opens the Field Properties page for the Start Date field.

By default, the 'Active' status is the only volunteer status that start dates are based on. If you want volunteer start dates to be based on a status other than—or in addition to—the 'Active' status, check the appropriate status checkbox (or boxes) here. For example, if you have a volunteer status called 'Applicant,' and you want your volunteer start dates to be based on the first date a volunteer's status becomes either 'Applicant' or 'Active,' check both the 'Active' and the 'Applicant' statuses, as shown in this illustration:



With the setting shown above, volunteer start dates will always be the first date a volunteer's status was set to either 'Applicant' or 'Active.'

Status checkboxes that appear disabled here cannot be used as the basis for start dates because they are statuses currently used to trigger volunteer stop dates.

5. Click the Save button to save any changes you make to the Field Properties page.

If you make any changes to the *Start date rule* they are applied to your database as soon as you save the Field Properties page. This means that volunteer start dates throughout your database are adjusted automatically based on the status (or statuses) you check here.

### Stop Date Rule

Like the *Start date rule*, a *Stop date rule* lets you customize which volunteer status (or statuses) volunteer stop dates should be based on. You set the stop date rule on the Field Properties page for the Stop Date field. If you're not already on the Field Properties page for the Stop Date field, you can get there like this:

1. Choose Setup from the menu.
2. Select 'Field Properties.'
3. Select 'History tab' (the History tab is where the Start and Stop date fields appear).
4. Click the 'Stop Date' link. This opens the Field Properties page for the Stop Date field.

By default, the 'Inactive' status is the only volunteer status that stop dates are based on. If you want volunteer stop dates to be based on a status other than—or in addition to—the 'Inactive' status, check the appropriate status checkboxes here. For example, if you have a volunteer status called 'LOA,' and you want your volunteer stop dates to be based on the date a volunteer's status becomes either 'LOA' or 'Inactive,' then check both the 'Inactive' and the 'LOA' statuses, as shown in this illustration:

**Stop Date Rule**

Make a volunteer's *stop date* the date their status becomes...

Active

Applicant

Inactive

LOA

Prospect

With the setting shown above, volunteer stop dates will always be the most recent date a volunteer's status was set to either 'LOA' or 'Inactive.'

Status checkboxes that appear disabled here cannot be used as the basis for stop dates because they are statuses currently used to trigger volunteer start dates.

5. Click the Save button to save any changes you make to the Field Properties page.

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## To Time Field Properties Setup Page

Help topic 2332

Added or revised 10-31-2008

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You can use the To time field properties setup page to configure the To time field in the Service box on the Service tab in the volunteer record. To get to the To time field properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Service tab, and then choose To time under Service box.

### Field location:

This section indicates where the To time field you are working with is located. In this case, the field is on the Service tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that this is a Time field.

### Require an entry:

*No*

If you select "No" it will be possible for the To time field on the Service tab to be left blank in Volgistics, as well as at VIC.

*Always*

If you select "Always" it will not be possible for the To time field on the Service tab to be left blank in Volgistics, or at VIC.

*Include as a grid column:*

Mark this checkbox if you would like the To time to be listed in a column within the Assignments box on the volunteer Service tab.

### **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

#### Volgistics Administrators

##### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

##### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

##### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

#### Power users

##### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

##### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

##### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

#### Basic users

##### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

##### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

*Hidden*

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## Merit hours Field Properties Setup Page

Help topic 2333

Added or revised 10-31-2008

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You can use the Merit hours Field properties setup page to configure the Merit hours field in the Service box on the Service tab in the volunteer record. To get to the Merit hours Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Service tab, and then choose Merit hours under Service box.

### Field location:

This section indicates where the Merit hours field you are working with is located. In this case, the field is on the Service tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Merit hours field is an Hours and minutes field. Note that this is a "system field," and as such you cannot customize certain field characteristics, including the field name.

### *Include as a grid column*

Mark this checkbox if you would like Merit hours to be listed in a column within the Service box on the volunteer Service tab.

## **System operator rights**

This section determines which types of [system operators \[pg:1895\]](#) can view, or view and change, this field in Volgistics.

### Volgistics Administrators

#### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

#### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

### Power users

### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

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## **Service Measure Field Properties Setup Page**

Help topic 2334

Added or revised 10-31-2008

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You can use the Service measure Field properties setup page to configure the Service measure field in the Service box on the Service tab in the volunteer record. To get to the Service measure Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Service tab, and then choose Service measure under Service box.

### Field location:

This section indicates where the Service measure field you are working with is located. In this case, the Service measure is on the Service tab.

### Require an entry:

#### *No*

If you select "No" it will be possible for this field on the Service tab to be left blank in Volgistics, as well as at VIC.

#### *Always*

If you select "Always" it will not be possible for this Service measure field on the Service tab to be left blank in Volgistics, or at VIC.

*Include as a grid column*

Mark this checkbox if you would like the Service measure to be listed in a column within the Service box on the volunteer Service tab.

### **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

#### Volgistics Administrators

##### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

##### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

##### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

#### Power users

##### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

##### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

##### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

#### Basic users

##### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

##### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.



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## Program Field Properties Setup Page

Help topic 2335

Added or revised 10-31-2008

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You can use the Program Field properties setup page to configure the Program field in the Mandatory Service box on the Service tab in the volunteer record. To get to the Program Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Service tab, and then choose Program under Mandatory Service box.

### Field location:

This section indicates where the Program field you are working with is located. In this case, the Program is on the Service tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Program field is a dropdown field.

### Field name:

This is the first place on the Program Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Program" by default. To change the name of the field, delete the text from this field and enter the new field name.

### Require an entry:

*Always*

An entry in the Program field is always required. Therefore, it will not be possible for the Program field on the Service tab to be left blank in Volgistics, or at VIC.

### Default entry:

If you want a certain drop down item to appear in this field by default, you can select it here. For example, if most of your volunteers are part of one mandatory service program, you might choose that program as the default so that you can pass by this field when creating a new volunteer record.

### **Drop down table items**

#### *Add a new item:*

This is where a system operator enters the possible options for this drop down field. Each time you enter a new item and click the **Save** button, an additional "Add a new item:" field will be created so that you can continue to add drop down items for this field. If you no longer want to use a particular drop down item, click the **Delete** button next to the field containing that item.

## **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

### Volgistics Administrators

#### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

#### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

### Power users

#### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

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## Starting Date Field Setup Page

Help topic 2336

Added or revised 10-31-2008

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You can use the Starting Date field setup page to configure the Starting Date field in the Mandatory Service box on the Service tab in the volunteer record. To get to the Starting Date field setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Service tab, and then choose Starting Date under the Mandatory Service box.

### Field location:

This section indicates where the Starting Date field you are working with is located. In this case, the field is on the Service tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that this is a Date field.

### Field name:

This is the first place on the Starting Date Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Starting Date" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

No

"No" must be selected in order for system operators to see this field and the information it contains on the Service tab of the volunteer record.

Yes

If you do not want system operators to be able to view the Starting Date field on the Service tab of the volunteer record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

### Require an entry:

No

If you select "No" it will be possible for the Starting Date field on the Service tab to be left blank in Volgistics, as well as at VIC.

Always

If you select "Always" it will not be possible for the Starting Date field on the Service tab to be left blank in Volgistics, or at VIC.

### Default entry:

If you want a certain date to appear in this field by default, you can enter it here.

## **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

### Volgistics Administrators

#### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

#### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

### Power users

#### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

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## Due By Field Setup Page

Help topic 2337

Added or revised 10-31-2008

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You can use the Due By field setup page to configure the Due By field in the Mandatory Service box on the Service tab in the volunteer record. To get to the Due By field setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Service tab, and then choose Due By under the Mandatory Service box.

### Field location:

This section indicates where the Due By field you are working with is located. In this case, the field is on the Service tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that this is a Date field.

### Field name:

This is the first place on the Due By Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Due By" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

*No*

"No" must be selected in order for system operators to see this field and the information it contains on the Service tab of the volunteer record.

*Yes*

If you do not want system operators to be able to view the Due By field on the Service tab of the volunteer record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

### Require an entry:

*No*

If you select "No" it will be possible for the Due By field on the Service tab to be left blank in Volgistics, as well as at VIC.

*Always*

If you select "Always" it will not be possible for the Due By field on the Service tab to be left blank in Volgistics, or at VIC.

### Default entry:

If you want a certain date to appear in this field by default, you can enter it here.

## **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

### Volgistics Administrators

#### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

#### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

### Power users

#### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

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## Completed On Field Setup Page

Help topic 2338

Added or revised 10-31-2008

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You can use the Completed on field setup page to configure the Completed on field in the Mandatory Service box on the Service tab in the volunteer record. To get to the Completed on field setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Service tab, and then choose Completed on under the Mandatory Service box.

### Field location:

This section indicates where the Completed on field you are working with is located. In this case, the field is on the Service tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that this is a Date field.

### Field name:

This is the first place on the Completed on Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Completed on" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

*No*

"No" must be selected in order for system operators to see this field and the information it contains on the Service tab of the volunteer record.

*Yes*

If you do not want system operators to be able to view the Completed on field on the Service tab of the volunteer record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

### Require an entry:

*No*

If you select "No" it will be possible for the Completed on field on the Service tab to be left blank in Volgistics, as well as at VIC.

*Always*

If you select "Always" it will not be possible for the Completed on field on the Service tab to be left blank in Volgistics, or at VIC.

### Default entry:

If you want a certain date to appear in this field by default, you can enter it here.

## **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

### Volgistics Administrators

#### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

#### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

### Power users

#### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

#### *Hidden*



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## Completed Field Properties Setup Page

Help topic 2339

Added or revised 10-31-2008

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You can use the Completed Field properties setup page to configure the Completed checkbox in the Mandatory Service box on the Service tab in the volunteer record. To get to the Completed checkbox Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Service tab, and then choose Completed under Mandatory Service.

### Field location:

This section indicates where the Completed field you are working with is located. In this case, the checkbox is on the Service tab.

### Field format:

Information is stored in several types of fields in Volgistics. This section indicates that the Completed field is a Checkbox field.

### Field name:

This is the first place on the Completed field properties setup page where a system operator can make any adjustments to the field. The checkbox is called "Completed" by default. To change the name of the checkbox, delete the text from this field and enter the name you would like to change the checkbox to.

### Hidden:

No

"No" must be selected in order for system operators to see this checkbox and the information it contains on the Service tab of the volunteer record.

Yes

If you do not want system operators to be able to view this Completed checkbox on the Service tab of the volunteer record, you can select "Yes" from the drop down list. When a checkbox is hidden, System operators will not see the checkbox or whether or not it was marked before the field was made hidden, but if the checkbox was marked before it was hidden, it will still be marked if you later unhide the checkbox.

### Default entry:

If you want this checkbox to be checked by default, you can check the box here.

## **System operator rights**

This section determines which types of [system operators \[pg:1895\]](#) can view, or view and change, this field in Volgistics.

### Volgistics Administrators

### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

### Power users

#### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

---

## **Service Required Field Setup Page**

Help topic 2340

Added or revised 10-31-2008

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You can use the Service required field setup page to configure the Service required field in the Mandatory Service box on the Service tab in the volunteer record. To get to the Service required field setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Service tab, and then choose Service required under the Mandatory Service box.

### Field location:

This section indicates where the Service required field you are working with is located. In this case, the field is on the Service tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that this is a Service required field.

### Require an entry:

*No*

If you select "No" it will be possible for the Service required field on the Service tab to be left blank in Volgistics, as well as at VIC.

*Always*

If you select "Always" it will not be possible for the Service required field on the Service tab to be left blank in Volgistics, or at VIC.

## **System operator rights**

This section determines which types of [system operators \[pg:1895\]](#) can view, or view and change, this field in Volgistics.

### Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

### Power users

*View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

*View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

### *Hidden*

---

## **Date Field Properties Setup Page**

Help topic 2341

Added or revised 11-01-2008

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You can use the Date field properties setup page to configure the Date field on the History tab in the volunteer record. To get to the Date field properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, History tab, and then choose Date.

### Field location:

This section indicates where the Date field you are working with is located. In this case, the field is on the History tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that this is a Date field.

### Field name:

This is the first place on the Date Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Date" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Require an entry:

#### *Always*

It will not be possible for the Date field on the History tab to be left blank.

### Default entry:

If you want a specific date to appear in this field by default, enter it here.

## **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

### Volgistics Administrators

#### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

#### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

### Power users

#### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

---

## Expires Field Properties Setup Page

Help topic 2342

Added or revised 11-01-2008

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You can use the Expires field properties setup page to configure the Expires field on the History tab in the volunteer record. To get to the Expires field properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, History tab, and then choose Expires.

### Field location:

This section indicates where the Expires field you are working with is located. In this case, the field is on the History tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that this is a Date field.

### Field name:

This is the first place on the Expires Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Expires" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

*No*

"No" must be selected in order for system operators to see this field and the information it contains on the History tab of the volunteer record.

*Yes*

If you do not want system operators to be able to view the Expires field on the History tab of the volunteer record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

### Require an entry:

*No*

If you select "No" it will be possible for the Expired field on the History tab to be left blank in Volgistics.

*Always*

If you select "Always" it will not be possible for the Expired field on the History tab to be left blank.

### Default entry:

If you want a specific date to appear in this field by default, enter it here.

*Include as a grid column*

Mark this box if you would like information from the Expires field to appear as a column on the History tab.

### **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

#### Volgistics Administrators

##### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

##### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

##### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

#### Power users

##### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

##### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

##### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

#### Basic users

##### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

##### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

##### *Hidden*

---

## Date Event Field Properties Setup Page

Help topic 2343

Added or revised 11-01-2008

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You can use the Date event field properties setup page to configure a Date event field on the History tab in the volunteer record. To get to the Date event field setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, History tab, and then choose the Date event field.

### Field location:

This section indicates where the Date event field you are working with is located. In this case, the field is on the History tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Date event field is a Dropdown field.

### Field name:

The Date event field is called "Dates" by default. This name cannot be changed.

### Require and entry:

An entry in the Date event field is always required.

### Default entry:

If you want a certain drop down item to appear in this field by default, you can select it here.

### **Drop down table items**

#### *Add a new item:*

This is where a system operator enters the possible options for this drop down field. Each time you enter a new item and click the **Save** button, an additional "Add a new item:" field will be created so that you can continue to add drop down items for this field. If you no longer want to use a particular drop down item, click the **Delete** button next to the field containing that item.

### **System operator rights**

This section determines which types of [system operators \[pg:1895\]](#) can view, or view and change, this field in Volgistics.

#### Volgistics Administrators

##### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.



#### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

#### Power users

#### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

#### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

---

## **Class Event Field Properties Setup Page**

Help topic 2344

Added or revised 11-01-2008

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You can use the Class event field properties setup page to configure a Class event field on the History tab in the volunteer record. To get to the Class event field setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, History tab, and then choose the Class event field.

Field location:

This section indicates where the Class event field you are working with is located. In this case, the field is on the History tab.

Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Class event field is a Dropdown field.

Field name:

The Class event field is called "Classes" by default. This name cannot be changed.

Require and entry:

An entry in the Class event field is always required.

Default entry:

If you want a certain drop down item to appear in this field by default, you can select it here.

**Drop down table items**

*Add a new item:*

This is where a system operator enters the possible options for this drop down field. Each time you enter a new item and click the **Save** button, an additional "Add a new item:" field will be created so that you can continue to add drop down items for this field. If you no longer want to use a particular drop down item, click the **Delete** button next to the field containing that item.

**System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

Power users

*View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

*View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

Basic users

*View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

*View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

*Hidden*

---

## Mail Event Field Properties Setup Page

Help topic 2345

Added or revised 11-01-2008

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You can use the Mail event field properties setup page to configure a Mail event field on the History tab in the volunteer record. To get to the Mail event field setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, History tab, and then choose the Mail event field.

### Field location:

This section indicates where the Mail event field you are working with is located. In this case, the field is on the History tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Mail event field is a Dropdown field.

### Field name:

The Mail event field is called "Mailings" by default. This name cannot be changed.

### Hidden:

*No*

"No" must be selected in order for system operators to see this field and the information it contains on the History tab of the volunteer record.

Yes

If you do not want system operators to be able to view the Mail event field on the History tab of the volunteer record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

Require and entry:

An entry in the Mail event field is always required.

Default entry:

If you want a certain drop down item to appear in this field by default, you can select it here.

### **Drop down table items**

*Add a new item:*

This is where a system operator enters the possible options for this drop down field. Each time you enter a new item and click the **Save** button, an additional "Add a new item:" field will be created so that you can continue to add drop down items for this field. If you no longer want to use a particular drop down item, click the **Delete** button next to the field containing that item.

### **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

#### Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

#### Power users

*View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

#### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

---

## **Notation (for Status dates) Field Properties Setup Page**

Help topic 2346

Added or revised 11-01-2008

---

You can use the Notation (for Status dates) field properties setup page to configure the Notations that will be used for Status date entries on the History tab in the volunteer record. To get to the Notation (for Status dates) field setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, History tab, and then choose Notation (for Status dates).

#### Field location:

This section indicates where the Notation (for Status dates) field is located. In this case, the field is on the History tab.

#### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Notation (for Status dates) field is a Dropdown field.

#### Field name:

The Notation (for Status dates) field is called "Status Notation" by default. This name cannot be changed.

#### Hidden:

*No*

"No" must be selected in order for system operators to see this field and the information it contains on the History tab of the volunteer record.

*Yes*

If you do not want system operators to be able to view the Notation (for Status dates) field on the History tab of the volunteer record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

Require and entry:

*No*

If you select "No" it will be possible for the Notation (for Status dates) field on the History tab to be left blank in Volgistics.

*Always*

If you select "Always" it will not be possible for the Notation (for Status dates) field on the History tab to be left blank.

Default entry:

If you want a certain drop down item to appear in this field by default, you can select it here.

### **Drop down table items**

*Add a new item:*

This is where a system operator enters the possible options for this drop down field. Each time you enter a new item and click the **Save** button, an additional "Add a new item:" field will be created so that you can continue to add drop down items for this field. Appropriate dropdown items for the Notation (for Status dates) field might include "Moved," "Resigned" or "Deceased." If you no longer want to use a particular drop down item, click the **Delete** button next to the field containing that item.

### **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

### Power users

#### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

### *Hidden*

---

## **Notation (for Checklist dates) Field Properties Setup Page**

Help topic 2347

Added or revised 11-07-2008

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You can use the Notation (for Checklist dates) field properties setup page to configure the Notations that will be used for Checklist date entries on the History tab in the volunteer record. To get to the Notation (for Checklist dates) field setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, History tab, and then choose Notation (for Checklist dates).

#### Field location:

This section indicates where the Notation (for Checklist dates) field is located. In this case, the field is on the History tab.

#### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Notation (for Checklist dates) field is a Dropdown field.

Field name:

The Notation (for Checklist dates) field is called "Checklist Notation" by default. This name cannot be changed.

Hidden:

No

"No" must be selected in order for system operators to see this field and the information it contains on the History tab of the volunteer record.

Yes

If you do not want system operators to be able to view the Notation (for Checklist dates) field on the History tab of the volunteer record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

Require and entry:

No

If you select "No" it will be possible for the Notation (for Checklist dates) field on the History tab to be left blank in Volgistics.

Always

If you select "Always" it will not be possible for the Notation (for Checklist dates) field on the History tab to be left blank.

Default entry:

If you want a certain drop down item to appear in this field by default, you can select it here.

### **Drop down table items**

*Add a new item:*

This is where a system operator enters the possible options for this drop down field. Each time you enter a new item and click the **Save** button, an additional "Add a new item:" field will be created so that you can continue to add drop down items for this field. Appropriate dropdown items for the Notation (for Checklist dates) field might include "Complete," "Waived" or "Passed." If you no longer want to use a particular drop down item, click the **Delete** button next to the field containing that item.

### **System operator rights**

This section determines which types of [system operators \[pg:1895\]](#) can view, or view and change, this field in Volgistics.

Volgistics Administrators



### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

### Power users

#### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

---

## **Notation (for Award dates) Field Properties Setup Page**

Help topic 2348

Added or revised 11-07-2008

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You can use the Notation (for Award dates) field properties setup page to configure the Notations that will be used for Award date entries on the History tab in the volunteer record. To get to the Notation (for Award dates) field setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, History tab, and then choose Notation (for Award dates).

Field location:

This section indicates where the Notation (for Award dates) field is located. In this case, the field is on the History tab.

Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Notation (for Award dates) field is a Dropdown field.

Field name:

The Notation (for Award dates) field is called "Award Notation" by default. This name cannot be changed.

Hidden:

No

"No" must be selected in order for system operators to see this field and the information it contains on the History tab of the volunteer record.

Yes

If you do not want system operators to be able to view the Notation (for Award dates) field on the History tab of the volunteer record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

Require and entry:

No

If you select "No" it will be possible for the Notation (for Award dates) field on the History tab to be left blank in Volgistics.

Always

If you select "Always" it will not be possible for the Notation (for Award dates) field on the History tab to be left blank.

Default entry:

If you want a certain drop down item to appear in this field by default, you can select it here.

**Drop down table items**

*Add a new item:*

This is where a system operator enters the possible options for this drop down field. Each time you enter a new item and click the **Save** button, an additional "Add a new item:" field will be created so that you can continue to add drop down items for this field. Appropriate dropdown items for the Notation (for Award dates) field might include "Presented" or "Nominated." If you no longer want to use a particular drop down item, click the **Delete** button next to the field containing that item.

## **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

### Volgistics Administrators

#### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

#### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

### Power users

#### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

---

## Notation (for Class dates) Field Properties Setup Page

Help topic 2349

Added or revised 11-07-2008

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You can use the Notation (for Class dates) field properties setup page to configure the Notations that will be used for Class date entries on the History tab in the volunteer record. To get to the Notation (for Class dates) field setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, History tab, and then choose Notation (for Class dates).

### Field location:

This section indicates where the Notation (for Class dates) field is located. In this case, the field is on the History tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Notation (for Class dates) field is a Dropdown field.

### Field name:

The Notation (for Class dates) field is called "Class Notation" by default. This name cannot be changed.

### Hidden:

*No*

"No" must be selected in order for system operators to see this field and the information it contains on the History tab of the volunteer record.

*Yes*

If you do not want system operators to be able to view the Notation (for Class dates) field on the History tab of the volunteer record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

### Require and entry:

*No*

If you select "No" it will be possible for the Notation (for Class dates) field on the History tab to be left blank in Volgistics.

*Always*

If you select "Always" it will not be possible for the Notation (for Class dates) field on the History tab to be left blank.

### Default entry:

If you want a certain drop down item to appear in this field by default, you can select it here.

## **Drop down table items**

### *Add a new item:*

This is where a system operator enters the possible options for this drop down field. Each time you enter a new item and click the **Save** button, an additional "Add a new item:" field will be created so that you can continue to add drop down items for this field. Appropriate dropdown items for the Notation (for Class dates) field might include "Attended," "Completed" or "Registered." If you no longer want to use a particular drop down item, click the **Delete** button next to the field containing that item.

## **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

### Volgistics Administrators

#### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

#### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

### Power users

#### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

*View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

*Hidden*

---

## Notation (for Date dates) Field Properties Setup Page

Help topic 2350

Added or revised 11-07-2008

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You can use the Notation (for Date dates) field properties setup page to configure the Notations that will be used for Date date entries on the History tab in the volunteer record. To get to the Notation (for Date dates) field setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, History tab, and then choose Notation (for Date dates).

### Field location:

This section indicates where the Notation (for Date dates) field is located. In this case, the field is on the History tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Notation (for Date dates) field is a Dropdown field.

### Field name:

The Notation (for Date dates) field is called "Date Notation" by default. This name cannot be changed.

### Hidden:

*No*

"No" must be selected in order for system operators to see this field and the information it contains on the History tab of the volunteer record.

*Yes*

If you do not want system operators to be able to view the Notation (for Date dates) field on the History tab of the volunteer record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

### Require and entry:

*No*

If you select "No" it will be possible for the Notation (for Date dates) field on the History tab to be left blank in Volgistics.

*Always*

If you select "Always" it will not be possible for the Notation (for Date dates) field on the History tab to be left blank.

Default entry:

If you want a certain drop down item to appear in this field by default, you can select it here.

### **Drop down table items**

*Add a new item:*

This is where a system operator enters the possible options for this drop down field. Each time you enter a new item and click the **Save** button, an additional "Add a new item:" field will be created so that you can continue to add drop down items for this field. An appropriate dropdown item for the Notation (for Date dates) field might be "Returned," among other options. If you no longer want to use a particular drop down item, click the **Delete** button next to the field containing that item.

### **System operator rights**

This section determines which types of [system operators \[pg:1895\]](#) can view, or view and change, this field in Volgistics.

Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

Power users

*View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

*View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

### *Hidden*

---

## **Notation (for Mail notation) Field Properties Setup Page**

Help topic 2351

Added or revised 11-06-2008

---

You can use the Notation (for Mail notation) field properties setup page to configure the Notations that will be used for Mail date entries on the History tab in the volunteer record. To get to the Notation (for Mail notation) field setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, History tab, and then choose Notation (for Mail notation).

### Field location:

This section indicates where the Notation (for Mail notation) field is located. In this case, the field is on the History tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Notation (for Mail notation) field is a Dropdown field.

### Field name:

The Notation (for Mail notation) field is called "Mail Notation" by default. This name cannot be changed.

### Hidden:

*No*

"No" must be selected in order for system operators to see this field and the information it contains on the History tab of the volunteer record.

*Yes*



If you do not want system operators to be able to view the Notation (for Mail notation) field on the History tab of the volunteer record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

Require and entry:

*No*

If you select "No" it will be possible for the Notation (for Mail notation) field on the History tab to be left blank in Volgistics.

*Always*

If you select "Always" it will not be possible for the Notation (for Mail notation) field on the History tab to be left blank.

Default entry:

If you want a certain drop down item to appear in this field by default, you can select it here.

**Drop down table items**

*Add a new item:*

This is where a system operator enters the possible options for this drop down field. Each time you enter a new item and click the **Save** button, an additional "Add a new item:" field will be created so that you can continue to add drop down items for this field. Appropriate dropdown items for the Notation (for Mail notation) field might include "Mail Returned," "Email" or "Postal mail." If you no longer want to use a particular drop down item, click the **Delete** button next to the field containing that item.

**System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

## Power users

### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

## Basic users

### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

### *Hidden*

---

## **Spare Date Field Properties Setup Page**

Help topic 2352

Added or revised 11-07-2008

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You can use the Spare date field properties setup page to configure a Spare date field on the History tab in the volunteer record. To get to the Spare date field setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, History tab, and then choose the Spare date field.

### Field location:

This section indicates where the Spare date field you are working with is located. In this case, the field is on the History tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Spare date field is a Date field.

### Field name:

This is the first place on the Spare Field Properties setup page where a system operator can make any adjustments to the field. Use the Field name field to give your spare date field a name.

Hidden:

No

"No" must be selected in order for system operators to see this field and the information it contains on the History tab of the volunteer record.

Yes

If you do not want system operators to be able to view this Spare date field on the History tab of the volunteer record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

Require an entry:

No

If you select "No" it will be possible for this field on the History tab to be left blank in Volgistics, as well as at VIC.

Always

If you select "Always" it will not be possible for this Spare date field on the History tab to be left blank.

Default entry:

If you want a certain date to appear in this field by default, you can enter it here.

*Include as a grid column*

Mark this checkbox if you would like the spare date field to be listed in a column on the volunteer History tab.

**System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

## Power users

### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

## Basic users

### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

### *Hidden*

---

## **Spare Dropdown Field Properties Setup Page**

Help topic 2353

Added or revised 11-07-2008

---

You can use the Spare dropdown field setup page to configure a Spare dropdown field on the History tab in the volunteer record. To get to the Spare dropdown field setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, History tab, and then choose the Spare dropdown field.

### Field location:

This section indicates where the Spare dropdown field you are working with is located. In this case, the field is on the History tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Spare dropdown field is a Dropdown field.

### Field name:

This is the first place on the Spare dropdown Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Spare dropdown" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

Hidden:

No

"No" must be selected in order for system operators to see this field and the information it contains on the History tab of the volunteer record.

Yes

If you do not want system operators to be able to view the Spare dropdown field on the History tab of the volunteer record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

Default entry:

If you want a certain drop down item to appear in this field by default, you can select it here.

*Include as a grid column*

Mark this checkbox if you would like the spare dropdown field to be listed in a column on the volunteer History tab.

**Drop down table items**

*Add a new item:*

This is where a system operator enters the possible options for this drop down field. Each time you enter a new item and click the **Save** button, an additional "Add a new item:" field will be created so that you can continue to add drop down items for this field. If you no longer want to use a particular drop down item, click the **Delete** button next to the field containing that item.

**System operator rights**

This section determines which types of [system operators \[pg:1895\]](#) can view, or view and change, this field in Volgistics.

Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

#### Power users

##### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

##### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

##### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

#### Basic users

##### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

##### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

##### *Hidden*

---

## **Spare Checkbox Field Properties Setup Page**

Help topic 2354

Added or revised 11-07-2008

---

You can use the Spare checkbox setup page to configure a Spare checkbox on the History tab in the volunteer record. To get to the Spare checkbox setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, History tab, and then choose the Spare checkbox.

#### Field location:

This section indicates where the Spare checkbox you are working with is located. In this case, the checkbox is on the History tab.

#### Type of Field:

Information is stored in several types of fields in Volgistics. This section indicates that the Spare checkbox is a Checkbox field.

Field name:

This is the first place on the Spare Checkbox Properties setup page where a system operator can make any adjustments to the field. The checkbox is called "Spare checkbox" by default. To change the name of the checkbox, delete the text from this field and enter the name you would like to change the checkbox to.

Hidden:

*No*

"No" must be selected in order for system operators to see this checkbox and the information it contains on the History tab of the volunteer record.

*Yes*

If you do not want system operators to be able to view this Spare checkbox on the History tab of the volunteer record, you can select "Yes" from the drop down list. When a checkbox is hidden, System operators will not see the checkbox or whether or not it was marked before the field was made hidden, but if the checkbox was marked before it was hidden, it will still be marked if you later unhide the checkbox.

Default entry:

*Checked*

If you want this checkbox to be checked by default, you can check the box here.

*Include as a grid column*

Mark this checkbox if you would like the spare checkbox field to be listed in a column on the volunteer History tab.

**System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

## Power users

### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

## Basic users

### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

### *Hidden*

---

## **Spare Text Field Field Properties Setup Page**

Help topic 2355

Added or revised 11-07-2008

---

You can use the Spare text field field properties setup page to configure a Spare text field on the History tab in the volunteer record. To get to the Spare text field setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, History tab, and then choose the Spare text field.

### Field location:

This section indicates where the Spare text field you are working with is located. In this case, the field is on the History tab.

### Type of Field:

Information is stored in several types of fields in Volgistics. This section indicates that the Spare text field is a text field.

### Field name:

This is the first place on the Spare text field Properties setup page where a system operator can make any adjustments to the field. The field is called "Spare text" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.



Hidden:

*No*

"No" must be selected in order for system operators to see this field and the information it contains on the History tab of the volunteer record.

*Yes*

If you do not want system operators to be able to view this Spare text field on the History tab of the volunteer record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

Require an entry:

*No*

If you select "No" it will be possible for this field on the History tab to be left blank in Volgistics, as well as at VIC.

*Always*

If you select "Always" it will not be possible for this Spare text field on the History tab to be left blank in Volgistics, or at VIC.

Default entry:

If you want certain information to appear in this field by default, you can enter it here.

**System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

Power users

### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

### Basic users

### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

### *Hidden*

---

## **Date Entered Field Properties Setup Page**

Help topic 2356

Added or revised 11-07-2008

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You can use the Date entered field properties setup page to configure the Date entered field on the History tab in the volunteer record. To get to the Date entered field properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, History tab, and then choose Date entered.

### Field location:

This section indicates where the Date entered field you are working with is located. In this case, the field is on the History tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that this is a Date field.

### Default entry:

If you want a specific date to appear in this field by default, enter it here.

### *Include as a grid column*

Mark this box if you would like the Date entered information to appear in a column on the History tab.

### **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

#### Volgistics Administrators

##### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

##### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

##### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

#### Power users

##### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

##### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

##### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

#### Basic users

##### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

##### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

##### *Hidden*

---

## Start Date Field Properties Setup Page

Help topic 2357

Added or revised 11-07-2008

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You can use the start date field properties setup page to configure the start date field on the History tab in the volunteer record. To get to the start date field properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, History tab, and then choose Start date.

### Field location:

This section indicates where the start date field you are working with is located. In this case, the field is on the History tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that this is a Date field.

### Hidden:

You will need to select "No" from this dropdown field in order for users to see this field in Volgistics.

### Default entry:

If you want a specific date to appear in this field by default, enter it here.

### *Include as a grid column*

Mark this box if you would like the start date information to appear in a column on the History tab.

## **System operator rights**

This section determines which types of [system operators \[pg:1895\]](#) can view, or view and change, this field in Volgistics.

### Volgistics Administrators

#### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

#### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

### Power users

### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

### Basic users

### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Basic users from both editing and viewing this field.

### **Start Date Rule**

Use this section of the Start date field properties setup page to customize how a volunteer's [start date \[pg:1890\]](#) is determined.

---

## **Stop Date Field Properties Setup Page**

Help topic 2358

Added or revised 11-07-2008

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You can use the stop date field properties setup page to configure the stop date field on the History tab in the volunteer record. To get to the stop date field properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, History tab, and then choose Stop date.

### Field location:

This section indicates where the stop date field you are working with is located. In this case, the field is on the History tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that this is a Date field.

Hidden:

You will need to select "No" from this dropdown field in order for users to see this field in Volgistics.

Default entry:

If you want a specific date to appear in this field by default, enter it here.

*Include as a grid column*

Mark this box if you would like the stop date information to appear in a column on the History tab.

**System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

Power users

*View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

*View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

Basic users

*View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Basic users from both editing and viewing this field.

### **Stop Date Rule**

Use this section of the Stop date field properties setup page to customize how a volunteer's **stop date** [pg:1890] is determined.

---

## **Last Name Field Properties Setup Page**

Help topic 2359

Added or revised 11-11-2008

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You can use the Last name Field Properties setup page to configure the Last name field on the Contacts tab in the volunteer record. To get to the Contacts tab Last name Field Properties setup page, choose Setup from the **menu** [pg:0215], click on Field options, Contacts tab, and then choose Last name.

#### Field location:

This section indicates where the Last name field you are working with is located. In this case, the field is on the Contacts tab.

#### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Last name field is a Text field.

#### Field name:

This is the first place on the Last name Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Last name" by default; however, some organizations may want to use a different name for this field. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

#### Hidden:

*No*

"No" is the default option here. "No" must be selected in order for system operators to see this field and the information it contains on the Contacts tab of the volunteer record.

*Yes*

If you do not want system operators to be able to view the Last name field on the Contacts tab of the volunteer record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

Require an entry:

*No*

If you select "No" it will be possible for the Last name field on the Contacts tab to be left blank in Volgistics, as well as at VIC.

*At VIC*

If a volunteer has access to their personal information at VIC, they may either intentionally or inadvertently delete information stored in the Last name field. If you select the "At VIC" option, the system will not allow them to log out with a blank Last name field.

*Always*

If you select "Always" it will not be possible for the Last name field on the Contacts tab to be left blank in Volgistics, or at VIC.

Default entry:

The Last name field often contains no default entry. If, however, you want certain text to initially appear in the Last name field on the Contacts tab in all new volunteer records, enter it here.

**System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

Power users

*View and change*



Select this option to permit system operators designated as Power users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

#### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

---

## **First Name Field Properties Setup Page**

Help topic 2360

Added or revised 09-19-2008

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You can use the First name Field Properties setup page to configure the First name field on the Contacts tab in the volunteer record. To get to the Contacts tab First name Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Contacts tab, and then choose First name.

#### Field location:

This section indicates where the First name field you are working with is located. In this case, the field is on the Contacts tab.

#### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the First name field is a Text field.

#### Field name:

This is the first place on the First name Field Properties setup page where a system operator can make any adjustments to the field. The field is called "First name" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

#### Hidden:

*No*

"No" is the default option here. "No" must be selected in order for system operators to see this field and the information it contains on the Contacts tab of the volunteer record.

*Yes*

If you do not want system operators to be able to view the First name field on the Contacts tab of the volunteer record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

Require an entry:

*No*

If you select "No" it will be possible for the First name field on the Contacts tab to be left blank in Volgistics, as well as at VIC.

*At VIC*

If a volunteer has access to their personal information at VIC, they may either intentionally or inadvertently delete information stored in the First name field. If you select the "At VIC" option, the system will not allow them to log out with a blank First name field.

*Always*

If you select "Always" it will not be possible for the First name field on the Contacts tab to be left blank in Volgistics, or at VIC.

Default entry:

The First name field often contains no default entry. If, however, you want certain text to initially appear in the First name field on the Contacts tab in all new volunteer records, enter it here.

### **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

#### Power users

##### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

##### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

##### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

#### Basic users

##### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

##### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

##### *Hidden*

---

## **Middle Name Field Properties Setup Page**

Help topic 2361

Added or revised 11-11-2008

---

You can use the Middle name Field Properties setup page to configure the Middle name field on the Contacts tab in the volunteer record. To get to the Contacts tab Middle name Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Contacts tab, and then choose Middle name.

#### Field location:

This section indicates where the Middle name field you are working with is located. In this case, the field is on the Contacts tab.

#### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Middle name field is a Text field.

### Field name:

This is the first place on the Middle name Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Middle name" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

*No*

"No" is the default option here. "No" must be selected in order for system operators to see this field and the information it contains on the Contacts tab of the volunteer record.

*Yes*

If you do not want system operators to be able to view the Middle name field on the Contacts tab of the volunteer record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

### Require an entry:

*No*

If you select "No" it will be possible for the Middle name field on the Contacts tab to be left blank in Volgistics, as well as at VIC.

*At VIC*

If a volunteer has access to their personal information at VIC, they may either intentionally or inadvertently delete information stored in the Middle name field. If you select the "At VIC" option, the system will not allow them to log out with a blank Middle name field.

*Always*

If you select "Always" it will not be possible for the Middle name field on the Contacts tab to be left blank in Volgistics, or at VIC.

### Default entry:

The Middle name field often contains no default entry. If, however, you want certain text to initially appear in the Middle name field on the Contacts tab in all new volunteer records, enter it here.

### **System operator rights**

This section determines which types of [system operators \[pg:1895\]](#) can view, or view and change, this field in Volgistics.

#### Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

### Power users

#### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

### *Hidden*

---

## **Nickname Field Properties Setup Page**

Help topic 2362

Added or revised 11-11-2008

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You can use the Nickname Field Properties setup page to configure the Nickname field on the Contacts tab in the volunteer record. To get to the Contacts tab Nickname Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Contacts tab, and then choose Nickname.

### Field location:

This section indicates where the Nickname field you are working with is located. In this case, the field is on the Contacts tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Nickname field is a Text field.

### Field name:

This is the first place on the Nickname Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Nickname" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

*No*

"No" must be selected in order for system operators to see this field and the information it contains on the Contacts tab of the volunteer record.

*Yes*

If you do not want system operators to be able to view the Nickname field on the Contacts tab of the volunteer record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

### Default entry:

The Nickname field often contains no default entry. If, however, you want a certain entry to appear in this field by default, you can type it here.

## **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

### Volgistics Administrators

#### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

#### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

### Power users

### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

### Basic users

### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

### *Hidden*

---

## **Title Field Properties Setup Page**

Help topic 2363

Added or revised 11-11-2008

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You can use the Title Field Properties setup page to configure the Title field on the Contacts tab in the volunteer record. To get to the Contacts tab Title Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Contacts tab, and then choose Title.

### Field location:

This section indicates where the Title field you are working with is located. In this case, the field is on the Contacts tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Title field is a Dropdown field.

### Field name:

This is the first place on the Title Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Title" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

*No*

"No" must be selected in order for system operators to see this field and the information it contains on the Contacts tab of the volunteer record.

*Yes*

If you do not want system operators to be able to view the Title field on the Contacts tab of the volunteer record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

### Default entry:

If you want a certain drop down item to appear in this field by default, you can select it here.

### **Drop down table items**

*Add a new item:*

This is where a system operator enters the possible options for this drop down field. Examples of potential drop down items for the Title field include "Mr.," "Ms.," "Mrs.," "Dr.," etc. Each time you enter a new item and click the **Save** button, an additional "Add a new item:" field will be created so that you can continue to add drop down items for this field. If you no longer want to use a particular drop down item, click the **Delete** button next to the field containing that item. You can also merge one Title into another. After you merge two dropdown items together, any records that had the first entry will have the second entry you choose instead. The merged item will no longer appear as a choice in the Status field.  
Note: Several minutes may pass before the merged values appear in your database.

### **System operator rights**

This section determines which types of [system operators \[pg:1895\]](#) can view, or view and change, this field in Volgistics.

#### Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.



## Power users

### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

## Basic users

### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

### *Hidden*

---

## **Street Field Properties Setup Page**

Help topic 2364

Added or revised 11-11-2008

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You can use the Street Field Properties setup page to configure the Street field on the Contacts tab in the volunteer record. To get to the Contacts tab Street Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Contacts tab, and then choose Street.

### Field location:

This section indicates where the Street field you are working with is located. In this case, the field is on the Contacts tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Street field is a Text field.

### Field name:

This is the first place on the Street Field Properties setup page where a system operator can make any adjustments to the field. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

Hidden:

*No*

"No" is the default option here. "No" must be selected in order for system operators to see this field and the information it contains on the Contacts tab of the volunteer record.

*Yes*

If you do not want system operators to be able to view the Street field on the Contacts tab of the volunteer record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

Require an entry:

*No*

If you select "No" it will be possible for the Street field on the Contacts tab to be left blank in Volgistics, as well as at VIC.

*At VIC*

This selection requires that users always enter information in this Street field at VIC, but system operators working within Volgistics will not be forced to enter information in this field.

*Always*

If you select "Always" it will not be possible for the Street field on the Contacts tab to be left blank in Volgistics, or at VIC.

Default entry:

If you want a certain option to appear in this Street field on the Contacts tab in all new volunteer records, select it here.

**System operator rights**

This section determines which types of [system operators \[pg:1895\]](#) can view, or view and change, this field in Volgistics.

Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

Power users

*View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

*View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

Basic users

*View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

*View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

*Hidden*

---

## City Field Properties Setup Page

Help topic 2365

Added or revised 11-11-2008

---

You can use the City Field Properties setup page to configure the City field on the Contacts tab in the volunteer record. To get to the Contacts tab City Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Contacts tab, and then choose City.

Field location:

This section indicates where the City field you are working with is located. In this case, the field is on the Contacts tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the City field is a Text field.

### Field name:

This is the first place on the City Field Properties setup page where a system operator can make any adjustments to the field. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

*No*

"No" is the default option here. "No" must be selected in order for system operators to see this field and the information it contains on the Contacts tab of the volunteer record.

*Yes*

If you do not want system operators to be able to view the City field on the Contacts tab of the volunteer record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

### Require an entry:

*No*

If you select "No" it will be possible for the City field on the Contacts tab to be left blank in Volgistics, as well as at VIC.

*At VIC*

This selection requires that users always enter information in this City field at VIC, but system operators working within Volgistics will not be forced to enter information in this field.

*Always*

If you select "Always" it will not be possible for the City field on the Contacts tab to be left blank in Volgistics, or at VIC.

### Default entry:

If you want a certain option to appear in this City field on the Contacts tab in all new volunteer records, select it here. For example, if your organization's volunteers are all or mostly local people, you might choose to enter the local city name in this field. This way, when creating a new volunteer record you can pass by this field if it already contains the correct information for that individual.

### **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

### Volgistics Administrators

### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

### Power users

#### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

---

## **State Field Properties Setup Page**

Help topic 2366

Added or revised 11-11-2008

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You can use the State Field Properties setup page to configure the State field on the Contacts tab in the volunteer record. To get to the Contacts tab State Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Contacts tab, and then choose State.

Field location:

This section indicates where the State field you are working with is located. In this case, the field is on the Contacts tab.

Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the State field is a Dropdown field.

Field name:

This is the first place on the State Field Properties setup page where a system operator can make any adjustments to the field. The field is called "State" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

Hidden:

No

"No" must be selected in order for system operators to see this field and the information it contains on the Contacts tab of the volunteer record.

Yes

If you do not want system operators to be able to view the State field on the Contacts tab of the volunteer record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

Require an entry:

No

If you select "No" it will be possible for the State field on the Contacts tab to be left blank in Volgistics, as well as at VIC.

*At VIC*

This selection requires that users always enter information in this State field at VIC, but system operators working within Volgistics will not be forced to enter information in this field.

*Always*

If you select "Always" it will not be possible for the State field on the Contacts tab to be left blank in Volgistics, or at VIC.

Default entry:

If you want a certain drop down item to appear in this field by default, you can select it here. For example, if all or most of your organization's volunteers are from one state, you can choose it as the default so that you can pass by this field when creating a new volunteer record.

## Drop down table items

*Add a new item:*

This is where a system operator enters the possible options for this drop down field. Each time you enter a new item and click the **Save** button, an additional "Add a new item:" field will be created so that you can continue to add drop down items for this field. If you no longer want to use a particular drop down item, click the **Delete** button next to the field containing that item.

## System operator rights

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

### Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

### Power users

*View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

*View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

### Basic users

*View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

*View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

*Hidden*

---

## Zip Field Properties Setup Page

Help topic 2367

Added or revised 11-11-2008

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You can use the Zip Field Properties setup page to configure the Zip field on the Contacts tab in the volunteer record. To get to the Contacts tab Zip Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Contacts tab, and then choose Zip.

### Field location:

This section indicates where the Zip field you are working with is located. In this case, the field is on the Contacts tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Zip field is a whole Zip field.

### Field name:

This is the first place on the Zip Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Zip" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

*No*

"No" is the default option here. "No" must be selected in order for system operators to see this field and the information it contains on the Contacts tab of the volunteer record.

*Yes*

If you do not want system operators to be able to view the Zip field on the Contacts tab of the volunteer record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

### Require an entry:

*No*

If you select "No" it will be possible for the Zip field on the Contacts tab to be left blank in Volgistics, as well as at VIC.



### *At VIC*

This selection requires that users always enter information in the Zip field at VIC, but system operators working within Volgistics will not be forced to enter information in this field.

### *Always*

If you select "Always" it will not be possible for the Zip field on the Contacts tab to be left blank in Volgistics, or at VIC.

### Default entry:

If you want a certain drop down item to appear in this field by default, you can select it here.

## **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

### Volgistics Administrators

#### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

#### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

### Power users

#### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

### Basic users

### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

### *Hidden*

---

## Country Field Properties Setup Page

Help topic 2368

Added or revised 09-26-2008

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You can use the Country Field Properties setup page to configure the Country field on the Contacts tab in the volunteer record. To get to the Contacts tab Country Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Contacts tab, and then choose Country.

### Field location:

This section indicates where the Country field you are working with is located. In this case, the field is on the Contacts tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Country field is a Dropdown field.

### Field name:

This is the first place on the Country Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Country" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

No

"No" must be selected in order for system operators to see this field and the information it contains on the Contacts tab of the volunteer record.

Yes

If you do not want system operators to be able to view the Country field on the Contacts tab of the volunteer record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

### Default entry:

If you want a certain drop down item to appear in this field by default, you can select it here. For example, if all or most of your organization's volunteers are from one Country, you can choose it as the default so that you can pass by this field when creating a new volunteer record.

### **Drop down table items**

*Add a new item:*

This is where a system operator enters the possible options for this drop down field. Each time you enter a new item and click the **Save** button, an additional "Add a new item:" field will be created so that you can continue to add drop down items for this field. If you no longer want to use a particular drop down item, click the **Delete** button next to the field containing that item.

### **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

#### Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

#### Power users

*View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

*View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

#### Basic users

*View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

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## Home Field Properties Setup Page

Help topic 2369

Added or revised 11-11-2008

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You can use the Home Field Properties setup page to configure the Home field on the Contacts tab in the volunteer record. To get to the Contacts tab Home Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Contacts tab, and then choose Home.

#### Field location:

This section indicates where the Home field you are working with is located. In this case, the field is on the Contacts tab.

#### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Home field is a phone number field.

There are six phone number format options. Select the way you would like to track Home phone numbers in your system from the drop down menu here.

#### Field name:

This is the first place on the Home Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Home" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

#### Hidden:

##### *No*

"No" is the default option here. "No" must be selected in order for system operators to see this field and the information it contains on the Contacts tab of the volunteer record.

##### *Yes*

If you do not want system operators to be able to view the Home field on the Contacts tab of the volunteer record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

Require an entry:

*No*

If you select "No" it will be possible for the Home phone number field on the Contacts tab to be left blank in Volgistics, as well as at VIC.

*At VIC*

This selection requires that users always enter a phone number in the Home field at VIC, but system operators working within Volgistics will not be forced to enter a number in this field.

*Always*

If you select "Always" it will not be possible for the Home field on the Contacts tab to be left blank in Volgistics, or at VIC.

Default entry:

If you want a certain drop down item to appear in this field by default, you can select it here.

**System operator rights**

This section determines which types of [system operators \[pg:1895\]](#) can view, or view and change, this field in Volgistics.

Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

Power users

*View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

*View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Basic users from both editing and viewing this field.

## **Related help**

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## **OK To Call Field Properties Setup Page**

Help topic 2370

Added or revised 11-11-2008

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You can use the OK to call Field Properties setup page to configure the OK to call field on the Contacts tab in the volunteer record. To get to the Contacts tab OK to call Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Contacts tab, and then choose OK to call.

### Field location:

This section indicates where the OK to call field you are working with is located. In this case, the field is on the Contacts tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that this is an OK to call field.

### Field name:

The field is called "OK to call." This field name cannot be changed.

### Hidden:

*No*

"No" is the default option here. "No" must be selected in order for system operators to see this field and the information it contains on the Contacts tab of the volunteer record.

Yes

If you do not want system operators to be able to view the OK to call field on the Contacts tab of the volunteer record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

Whether or not it is hidden can become very important for this particular field. Consider the following scenario: If an OK to call field is used and volunteers indicate that certain numbers are "OK to call" and others are not "OK to call," and then the field is hidden, Volgistics users will not know whether or not a volunteer should be contacted at a particular number stored in the system.

Default entry:

You can decide if the OK to call field on the Contacts tab is initially marked or unmarked in all new volunteer records by making the desired selection here.

**System operator rights**

This section determines which types of [system operators \[pg:1895\]](#) can view, or view and change, this field in Volgistics.

Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

Power users

*View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

*View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

## Basic users

### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

### *Hidden*

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## **Email Field Properties Setup Page**

Help topic 2376

Added or revised 11-11-2008

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You can use the Email Field Properties setup page to configure the Email field on the Contacts tab in the volunteer record. To get to the Contacts tab Email Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Contacts tab, and then choose Email.

### Field location:

This section indicates where the Email field you are working with is located. In this case, the field is on the Contacts tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Email field is a Text field.

### Field name:

This is the first place on the Email Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Email" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

*No*

"No" is the default option here. "No" must be selected in order for system operators to see this field and the information it contains on the Contacts tab of the volunteer record.

*Yes*

If you do not want system operators to be able to view the Email field on the Contacts tab of the volunteer record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.



Require an entry:

*No*

If you select "No" it will be possible for the Email field on the Contacts tab to be left blank in Volgistics, as well as at VIC.

*At VIC*

If a volunteer has access to their personal information at VIC, they may either intentionally or inadvertently delete information stored in the Email field. If you select the "At VIC" option, the system will not allow them to log out with a blank Email field.

*Always*

If you select "Always" it will not be possible for the Email field on the Contacts tab to be left blank in Volgistics, or at VIC.

Default entry:

The Email field often contains no default entry. If, however, you want certain text to initially appear in the Email field on the Contacts tab in all new volunteer records, enter it here.

**System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

Power users

*View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

*View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

### *Hidden*

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## **Web site Field Properties Setup Page**

Help topic 2377

Added or revised 11-11-2008

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You can use the Web site Field Properties setup page to configure the Web site field on the Contacts tab in the volunteer record. To get to the Contacts tab Web site Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Contacts tab, and then choose Web site.

### Field location:

This section indicates where the Web site field you are working with is located. In this case, the field is on the Contacts tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Web site field is a Text field.

### Field name:

This is the first place on the Web site Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Web site" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

*No*

"No" is the default option here. "No" must be selected in order for system operators to see this field and the information it contains on the Contacts tab of the volunteer record.

Yes

If you do not want system operators to be able to view the Web site field on the Contacts tab of the volunteer record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

Require an entry:

No

If you select "No" it will be possible for the Web site field on the Contacts tab to be left blank in Volgistics, as well as at VIC.

At VIC

If a volunteer has access to their personal information at VIC, they may either intentionally or inadvertently delete information stored in the Web site field. If you select the "At VIC" option, the system will not allow them to log out with a blank Web site field.

Always

If you select "Always" it will not be possible for the Web site field on the Contacts tab to be left blank in Volgistics, or at VIC.

Default entry:

The Web site field often contains no default entry. If, however, you want certain text to initially appear in the Web site field on the Contacts tab in all new volunteer records, enter it here.

### **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

#### Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

#### Power users

*View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

#### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

---

## **Kind Field Properties Setup Page**

Help topic 2378

Added or revised 11-11-2008

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You can use the Kind Field Properties setup page to configure the Kind field on the Contacts tab in the volunteer record. To get to the Contacts tab Kind Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Contacts tab, and then choose Kind.

#### Field location:

This section indicates where the Kind field you are working with is located. In this case, the field is on the Contacts tab.

#### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Kind field is a Dropdown field.

#### Field name:

This is the first place on the Kind Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Kind" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

#### *No*

"No" is the default option here. "No" must be selected in order for system operators to see this field and the information it contains on the Contacts tab of the volunteer record.

#### *Yes*

If you do not want system operators to be able to view the Kind field on the Contacts tab of the volunteer record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

### Require an entry:

#### *No*

If you select "No" it will be possible for the Kind field on the Contacts tab to be left blank in Volgistics, as well as at VIC.

#### *At VIC*

If a volunteer has access to their personal information at VIC, they may either intentionally or inadvertently delete information stored in the Kind field. If you select the "At VIC" option, the system will not allow them to log out with a blank Kind field.

#### *Always*

If you select "Always" it will not be possible for the Kind field on the Contacts tab to be left blank in Volgistics, or at VIC.

### Default entry:

The Kind field often contains no default entry. If, however, you want certain text to initially appear in the Kind field on the Contacts tab in all new volunteer records, enter it here.

### **Drop down table items**

#### *Add a new item:*

This is where a system operator enters the possible options for this drop down field. Each time you enter a new item and click the **Save** button, an additional "Add a new item:" field will be created so that you can continue to add drop down items for this field. If you no longer want to use a particular drop down item, click the **Delete** button next to the field containing that item.

### **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

### Volgistics Administrators

#### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

Power users

*View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

*View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

Basic users

*View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

*View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

*Hidden*

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## Relationship Field Properties Setup Page

Help topic 2379

Added or revised 11-11-2008

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You can use the Relationship Field Properties setup page to configure the Relationship field on the Contacts tab in the volunteer record. To get to the Contacts tab Relationship Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Contacts tab, and then choose Relationship.

#### Field location:

This section indicates where the Relationship field you are working with is located. In this case, the field is on the Contacts tab.

#### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Relationship field is a Dropdown field.

#### Field name:

This is the first place on the Relationship Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Relationship" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

#### Hidden:

*No*

"No" is the default option here. "No" must be selected in order for system operators to see this field and the information it contains on the Contacts tab of the volunteer record.

*Yes*

If you do not want system operators to be able to view the Relationship field on the Contacts tab of the volunteer record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

#### Require an entry:

*No*

If you select "No" it will be possible for the Relationship field on the Contacts tab to be left blank in Volgistics, as well as at VIC.

*At VIC*

If a volunteer has access to their personal information at VIC, they may either intentionally or inadvertently delete information stored in the Relationship field. If you select the "At VIC" option, the system will not allow them to log out with a blank Relationship field.

*Always*

If you select "Always" it will not be possible for the Relationship field on the Contacts tab to be left blank in Volgistics, or at VIC.

#### Default entry:

The Relationship field often contains no default entry. If, however, you want certain text to initially appear in the Relationship field on the Contacts tab in all new volunteer records, enter it here.

#### **Drop down table items**

*Add a new item:*

This is where a system operator enters the possible options for this drop down field. Each time you enter a new item and click the **Save** button, an additional "Add a new item:" field will be created so that you can continue to add drop down items for this field. If you no longer want to use a particular drop down item, click the **Delete** button next to the field containing that item.

### **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

#### Volgistics Administrators

##### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

##### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

##### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

#### Power users

##### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

##### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

##### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

#### Basic users

##### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

##### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.



*Hidden*

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## Employer field Properties Setup Page

Help topic 2380

Added or revised 11-11-2008

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You can use the Employer Field Properties setup page to configure the Employer field on the Contacts tab in the volunteer record. To get to the Contacts tab Employer field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Contacts tab, and then choose Employer name.

### Field location:

This section indicates where the Employer field you are working with is located. In this case, the field is on the Contacts tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Employer field is a Text field.

### Field name:

This is the first place on the Employer field Properties setup page where a system operator can make any adjustments to the field. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

*No*

"No" is the default option here. "No" must be selected in order for system operators to see this field and the information it contains on the Contacts tab of the volunteer record.

*Yes*

If you do not want system operators to be able to view the Employer field on the Contacts tab of the volunteer record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

### Require an entry:

*No*

If you select "No" it will be possible for the Employer field on the Contacts tab to be left blank in Volgistics, as well as at VIC.

*At VIC*

This selection requires that users always enter information in this Employer field at VIC, but system operators working within Volgistics will not be forced to enter information in this field.

### *Always*

If you select "Always" it will not be possible for the Employer field on the Contacts tab to be left blank in Volgistics, or at VIC.

### Default entry:

If you want a certain option to appear in this Employer field on the Contacts tab in all new volunteer records, select it here. When creating a new volunteer record you can pass by this field if it already contains the correct information for that individual.

## **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

### Volgistics Administrators

#### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

#### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

### Power users

#### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

*View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

*Hidden*

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## Contacted Field Properties Setup Page

Help topic 2381

Added or revised 11-11-2008

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You can use the Contacted Field Properties setup page to configure the Contacted field on the Contacts tab in the volunteer record. To get to the Contacts tab Contacted Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Contacts tab, and then choose Contacted.

Field location:

This section indicates where the Contacted field you are working with is located. In this case, the field is on the Contacts tab.

Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Contacted field is a Dropdown field.

Field name:

This is the first place on the Contacted Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Contacted" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

Hidden:

*No*

"No" is the default option here. "No" must be selected in order for system operators to see this field and the information it contains on the Contacts tab of the volunteer record.

*Yes*

If you do not want system operators to be able to view the Contacted field on the Contacts tab of the volunteer record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

Require an entry:

*No*

If you select "No" it will be possible for the Contacted field on the Contacts tab to be left blank in Volgistics, as well as at VIC.

*At VIC*

If a volunteer has access to their personal information at VIC, they may either intentionally or inadvertently delete information stored in the Contacted field. If you select the "At VIC" option, the system will not allow them to log out with a blank Contacted field.

*Always*

If you select "Always" it will not be possible for the Contacted field on the Contacts tab to be left blank in Volgistics, or at VIC.

Default entry:

The Contacted field often contains no default entry. If, however, you want certain text to initially appear in the Contacted field on the Contacts tab in all new volunteer records, enter it here.

### **Drop down table items**

*Add a new item:*

This is where a system operator enters the possible options for this drop down field. Each time you enter a new item and click the **Save** button, an additional "Add a new item:" field will be created so that you can continue to add drop down items for this field. If you no longer want to use a particular drop down item, click the **Delete** button next to the field containing that item.

### **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

Power users

*View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

#### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

---

## Verified Field Properties Setup Page

Help topic 2382

Added or revised 11-01-2008

---

You can use the Verified field properties setup page to configure the Verified field on the Contacts tab in the volunteer record. To get to the Verified field properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Contacts tab, and then choose Verified.

#### Field location:

This section indicates where the Verified field you are working with is located. In this case, the field is on the Contacts tab.

#### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that this is a Date field.

#### Field name:

This is the first place on the Verified Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Verified" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

#### Require an entry:

*Always*

It will not be possible for the Verified field on the Contacts tab to be left blank.

Default entry:

If you want a specific date to appear in this field by default, enter it here.

### **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

#### Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

#### Power users

*View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

*View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

#### Basic users

*View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

*View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

---

## Spare Date Field Properties Setup Page

Help topic 2383

Added or revised 11-13-2008

---

You can use the Spare date field properties setup page to configure a Spare date field on the Contacts tab in the volunteer record. To get to the Spare date field setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Contacts tab, and then choose the Spare date field under the Assignment box.

### Field location:

This section indicates where the Spare date field you are working with is located. In this case, the field is on the Contacts tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Spare date field is a Date field.

### Field name:

This is the first place on the Spare Field Properties setup page where a system operator can make any adjustments to the field. Use the Field name field to give your spare date field a name.

### Hidden:

No

"No" must be selected in order for system operators to see this field and the information it contains on the Contacts tab of the volunteer record.

Yes

If you do not want system operators to be able to view this Spare date field on the Contacts tab of the volunteer record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

### Require an entry:

No

If you select "No" it will be possible for this field on the Contacts tab to be left blank in Volgistics, as well as at VIC.

Always

If you select "Always" it will not be possible for this Spare date field on the Contacts tab to be left blank in Volgistics, or at VIC.

### Default entry:

If you want a certain date to appear in this field by default, you can enter it here.

### *Include as a grid column*

Mark this checkbox if you would like the spare date field to be listed in a column within the Assignments box on the volunteer Contacts tab.

### **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

#### Volgistics Administrators

##### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

##### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

##### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

#### Power users

##### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

##### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

##### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

#### Basic users

##### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.



## *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

## *Hidden*

---

# Spare Field Setup Page

Help topic 2384

Added or revised 11-13-2008

---

You can use the Spare field setup page to configure a Spare field on the Contacts tab in the volunteer record. To get to the Spare field setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Contacts tab, and then choose the Spare field of interest.

### Field location:

This section indicates where the Spare field you are working with is located. In this case, the field is on the Contacts tab.

### Field format:

Information is stored in several types of fields in Volgistics. This section indicates that the Spare field can be customized to take the form any one of the following field types: Text; Date; Number (whole); Number (1 decimal place); Number (2 decimal places), or currency.

### Field name:

This is the first place on the Spare Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Spare field" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

*No*

"No" must be selected in order for system operators to see this field and the information it contains on the Contacts tab of the volunteer record.

*Yes*

If you do not want system operators to be able to view this Spare field on the Contacts tab of the volunteer record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

### Require an entry:

*No*

If you select "No" it will be possible for this field on the Contacts tab to be left blank in Volgistics, as well as at VIC.

#### *At VIC*

This selection requires that users always enter information in this Spare field at VIC, but system operators working within Volgistics will not be forced to enter information in this field.

#### *Always*

If you select "Always" it will not be possible for this Spare field on the Contacts tab to be left blank in Volgistics, or at VIC.

#### Default entry:

If you want certain information to appear in this field by default, you can enter it here.

### **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

#### Volgistics Administrators

##### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

##### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

##### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

#### Power users

##### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

##### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

##### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

## Basic users

### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

### *Hidden*

---

## **Access Disabled Setup Page**

Help topic 2385

Added or revised 11-13-2008

---

You can use the Access disabled setup page to configure the Access disabled field on the Vic tab in the volunteer record. To get to the setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Vic tab, and then choose Access disabled.

### Field location:

This section indicates where the Access disabled you are working with is located. In this case, the checkbox is on the Vic tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that Access disabled is a Checkbox field.

### Hidden:

No

"No" must be selected in order for system operators to see this checkbox and the information it contains on the Vic tab of the volunteer record.

Yes

If you do not want system operators to be able to view this Access disabled on the Vic tab of the volunteer record, you can select "Yes" from the drop down list. When a checkbox is hidden, System operators will not see the checkbox or whether or not it was marked before the field was made hidden, but if the checkbox was marked before it was hidden, it will still be marked if you later unhide the checkbox.

### Default entry:

If you want this checkbox to be checked by default, you can check the box here.

## **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

### Volgistics Administrators

#### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

#### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

### Power users

#### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

---

## How to Setup the Daily Availability Field

Help topic 2386

Added or revised 09-30-2016

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The *Daily availability* field is an informational type field used by [System Operators \[pg:0065\]](#) to see when a volunteer is available to serve. It is found on the Profile tab of the [volunteer record \[pg:1849\]](#).

The *Daily availability* field is not linked with the [schedule \[pg:0746\]](#) fields for a volunteer. A volunteer can have a certain availability indicated, but they may or may not be scheduled for a corresponding time.

The *Daily availability* setup also controls what appears for the *Time needed* field on the Profile tab of [assignment records \[pg:0096\]](#). The *Time needed* field can appear on your [Opportunity Directory \[pg:0420\]](#), and on assignment descriptions on [application forms \[pg:1351\]](#) and in [VicNet \[pg:1724\]](#).

The *Daily availability* and *Time needed* fields also play a role in [Volunteer & Assignment Matching \[pg:0899\]](#) because the system looks for common selections on the volunteer and assignment records as part of what determines if the volunteer is a match for an assignment.

To get to the page where you can configure the *Daily availability* field:

1. Select [Setup \[pg:0887\]](#) from the menu.
2. Expand the *Field options* link.
3. Select *Profile tab (for volunteers)*.
4. Select *Daily availability*.

At the top of the page, select whether to track availability on an ongoing basis, or between a date range. If you select to track availability on an ongoing basis, the intervals you set will be rows and you will have a column for each weekday:

Availability							
	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Morning:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Afternoon:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Evening:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

If you select to track availability for a certain date range, each date in the range will be a row and the intervals will be columns. Here is how the field would look for a festival that takes place from Friday September 30th to Monday October 3rd:

Availability			
	Morning	Afternoon	Evening
Friday, September 30, 2016:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Saturday, October 1, 2016:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sunday, October 2, 2016:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Monday, October 3, 2016:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

If you have enabled [Volunteer & Assignment Matching \[pg:0899\]](#) for your account, you will also see an option for *Use availability information when matching volunteers and assignments*. Check this box if you want the system to look for overlaps between the volunteer's *Daily availability* and the assignment's *Time needed* entries when calculating if the volunteer is a match for the assignment. Leave the box un-checked if you do not want the system to look at availability when it is determining if the volunteer is a match for the assignment.

**Track availability for these days of the week**

Check each day of the week where you want to track availability. Please note:

- If you select to track availability as ongoing, the weekdays will always be displayed with Sunday first. So even if you are only tracking weekend availability, the display will show *Sunday, Friday, Saturday* instead of *Friday, Saturday, Sunday*.
- If you select to track availability between a date range, the first date in the range will be displayed first and then each date after will be listed in the order the dates occur.
- If you select to track availability between a date range, the weekday that the date occurs on must be selected in order for the date to show. For example, if your range goes from Friday September 30th to Monday October 3rd, and *Sundays* is not checked, Sunday October 2nd will not show on the list.

**Track daily availability using**

Actual times

If you select

*Actual times*

the field will appear with dropdown lists to select the *From* and *To* times for availability. The time range and intervals in the dropdown lists are controlled by the [Hours of Operation \[pg:1395\]](#) and scheduling intervals set on the [Scheduling Ground Rules \[pg:1392\]](#) page.

Here is how the Daily Availability field will look with *Actual times* selected along with a date range:

Here is how the Daily Availability field will look with *Actual times* selected along with tracking availability on an ongoing basis:

These pre-set intervals

Instead of *Actual times*, you can create pre-set intervals to track availability. By default, the intervals are general (*Morning, Afternoon, and Evening*), but there are eight intervals available so you can get more specific. For example, if you need volunteers from 6:00 am to 10:00 pm, you could break the day into two hour chunks:

Availability	Monday	Tuesday	Wednesday	Thursday	Friday
6:00 am - 8:00 am:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8:00 am - 10:00 am:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10:00 am - Noon:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Noon - 2:00 pm:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2:00 pm - 4:00 pm:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4:00 pm - 6:00 pm:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6:00 pm - 8:00 pm:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8:00 pm - 10:00 pm:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Or, a festival may want to add descriptive information about the jobs that take place during the times:

Availability	Setup 10am- Noon	Info Booth Noon-5pm	Info Booth 5pm-10pm	Tear Down 10pm-11pm	Security 11pm-4am	Security 4am-10am
Friday, September 30, 2016:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Saturday, October 1, 2016:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sunday, October 2, 2016:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

### Please note!

You can only use a [Set \[pg:0858\]](#) to query the database to find volunteers with certain availabilities checked if you use

*These pre-set intervals*

. The

*Actual times*

option will

**not**

allow you to search for all volunteers with certain times selected.

You can learn how to build a Set to find volunteers with certain availabilities checked in [help topic 2878 \[pg:0882\]](#) "Their Daily Availability Set Rule."

### Clear availability

There may be times where you want to clear all of the selections volunteers have for availability. For example, if you are changing from tracking actual times to using pre-set intervals, or if your organization only tracks availability for an annual event that takes place over different dates each year. Clearing availability will wipe all of a volunteer's current choices away so she can sign-in to [VicNet \[pg:1724\]](#) and make new choices for the field.

This change cannot be undone so you should only proceed if you're positive you will not need the availability information currently stored on the volunteer records. *Also, please note that if a [Site-Level Operator \[pg:1442\]](#) clears availability, it will clear the field for volunteers at all Sites in the account--not just the operator's Site.*

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## Share My Schedule Setup Page

Help topic 2387

Added or revised 11-13-2008

---

You can use the Share my schedule setup page to configure the Share my schedule field on the Vic tab in the volunteer record. To get to the setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Vic tab, and then choose Share my schedule.

### Field location:

This section indicates where the Share my schedule field you are working with is located. In this case, it is on the Vic tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that Share my schedule is a Checkbox field.

### Field name:

This field is called "Share my schedule" (Allow others to see when I am scheduled). It is not possible to change the name of this field.

### Hidden:

No

"No" must be selected in order for system operators to see this checkbox and the information it contains on the Vic tab of the volunteer record.

Yes

If you do not want system operators to be able to view this Share my schedule on the Vic tab of the volunteer record, you can select "Yes" from the drop down list. When a checkbox is hidden, System operators will not see the checkbox or whether or not it was marked before the field was made hidden, but if the checkbox was marked before it was hidden, it will still be marked if you later unhide the checkbox.

### Default entry:

If you want this checkbox to be checked by default, you can check the box here.

## **System operator rights**

This section determines which types of [system operators \[pg:1895\]](#) can view, or view and change, this field in Volgistics.

### Volgistics Administrators



### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

### Power users

#### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Basic users from both editing and viewing this field.

### **Reset all**

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## Site Field Properties Setup Page

Help topic 2388

Added or revised 11-11-2008

---

You can use the Site Field Properties setup page to configure the Site field on the Site tab in the Site record. To get to the Site tab Site Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Site tab, and then choose Site.

### Field location:

This section indicates where the Site field you are working with is located. In this case, the field is on the Site tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Site field is a Text field.

### Default entry:

If you want a certain option to appear in this Site field on the Site tab in all new Site records, select it here.

### **System operator rights**

This section determines which types of [system operators \[pg:1895\]](#) can view, or view and change, this field in Volgistics.

#### Volgistics Administrators

##### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

##### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

##### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

#### Power users

##### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

##### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

### *Hidden*

---

## **Type Field Properties Setup Page**

Help topic 2389

Added or revised 11-13-2008

---

You can use the Type field setup page to configure the Type field on the Site tab in the Site record. To get to the Type field setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Site tab, and then choose the Type field.

### Field location:

This section indicates where the Type field you are working with is located. In this case, the field is on the Site tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Type field is a Dropdown field.

### Field name:

This is the first place on the Type Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Type" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

No

"No" must be selected in order for system operators to see this field and the information it contains on the Site tab of the Site record.

Yes

If you do not want system operators to be able to view the Type field on the Site tab of the Site record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

Default entry:

If you want a certain drop down item to appear in this field by default, you can select it here.

**Drop down table items**

*Add a new item:*

This is where a system operator enters the possible options for this drop down field. Each time you enter a new item and click the **Save** button, an additional "Add a new item:" field will be created so that you can continue to add drop down items for this field. If you no longer want to use a particular drop down item, click the **Delete** button next to the field containing that item.

**System operator rights**

This section determines which types of [system operators \[pg:1895\]](#) can view, or view and change, this field in Volgistics.

Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

Power users

*View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

*View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

#### Basic users

##### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

##### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

##### *Hidden*

---

## Street Field Properties Setup Page

Help topic 2390

Added or revised 11-11-2008

---

You can use the Street Field Properties setup page to configure the Street field on the Site tab in the Site record. To get to the Site tab Street Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Site tab, and then choose Street.

#### Field location:

This section indicates where the Street field you are working with is located. In this case, the field is on the Site tab.

#### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Street field is a Text field.

#### Field name:

This is the first place on the Street Field Properties setup page where a system operator can make any adjustments to the field. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

#### Hidden:

*No*

"No" is the default option here. "No" must be selected in order for system operators to see this field and the information it contains on the Site tab of the Site record.

*Yes*

If you do not want system operators to be able to view the Street field on the Site tab of the Site record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

Require an entry:

*No*

If you select "No" it will be possible for the Street field on the Site tab to be left blank in Volgistics, as well as at VIC.

*At VIC*

This selection requires that users always enter information in this Street field at VIC, but system operators working within Volgistics will not be forced to enter information in this field.

*Always*

If you select "Always" it will not be possible for the Street field on the Site tab to be left blank in Volgistics, or at VIC.

Default entry:

If you want a certain option to appear in this Street field on the Site tab in all new Site records, select it here.

**System operator rights**

This section determines which types of [system operators \[pg:1895\]](#) can view, or view and change, this field in Volgistics.

Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

Power users

*View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

*View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

### *Hidden*

---

## **City Field Properties Setup Page**

Help topic 2361

Added or revised 11-11-2008

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You can use the City Field Properties setup page to configure the City field on the Site tab in the Site record. To get to the Site tab City Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Site tab, and then choose City.

### Field location:

This section indicates where the City field you are working with is located. In this case, the field is on the Site tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the City field is a Text field.

### Field name:

This is the first place on the City Field Properties setup page where a system operator can make any adjustments to the field. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

*No*

"No" is the default option here. "No" must be selected in order for system operators to see this field and the information it contains on the Site tab of the Site record.

*Yes*

If you do not want system operators to be able to view the City field on the Site tab of the Site record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

Require an entry:

*No*

If you select "No" it will be possible for the City field on the Site tab to be left blank in Volgistics, as well as at VIC.

*At VIC*

This selection requires that users always enter information in this City field at VIC, but system operators working within Volgistics will not be forced to enter information in this field.

*Always*

If you select "Always" it will not be possible for the City field on the Site tab to be left blank in Volgistics, or at VIC.

Default entry:

If you want a certain option to appear in this City field on the Site tab in all new Site records, select it here.

**System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

Power users

*View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

*View*



Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

Basic users

*View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

*View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

*Hidden*

---

## State Field Properties Setup Page

Help topic 2392

Added or revised 11-11-2008

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You can use the State Field Properties setup page to configure the State field on the Site tab in the Site record. To get to the Site tab State Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Site tab, and then choose State.

Field location:

This section indicates where the State field you are working with is located. In this case, the field is on the Site tab.

Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the State field is a Dropdown field.

Field name:

This is the first place on the State Field Properties setup page where a system operator can make any adjustments to the field. The field is called "State" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

Hidden:

*No*

"No" must be selected in order for system operators to see this field and the information it contains on the Site tab of the Site record.

Yes

If you do not want system operators to be able to view the State field on the Site tab of the Site record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

Require an entry:

No

If you select "No" it will be possible for the State field on the Site tab to be left blank in Volgistics, as well as at VIC.

At VIC

This selection requires that users always enter information in this State field at VIC, but system operators working within Volgistics will not be forced to enter information in this field.

Always

If you select "Always" it will not be possible for the State field on the Site tab to be left blank in Volgistics, or at VIC.

Default entry:

If you want a certain drop down item to appear in this field by default, you can select it here. For example, if all or most of your organization's volunteers are from one state, you can choose it as the default so that you can pass by this field when creating a new Site record.

### **Drop down table items**

*Add a new item:*

This is where a system operator enters the possible options for this drop down field. Each time you enter a new item and click the **Save** button, an additional "Add a new item:" field will be created so that you can continue to add drop down items for this field. If you no longer want to use a particular drop down item, click the **Delete** button next to the field containing that item.

### **System operator rights**

This section determines which types of [system operators \[pg:1895\]](#) can view, or view and change, this field in Volgistics.

Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

### Power users

#### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

### *Hidden*

---

## **Zip Field Properties Setup Page**

Help topic 2393

Added or revised 11-11-2008

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You can use the Zip Field Properties setup page to configure the Zip field on the Site tab in the Site record. To get to the Site tab Zip Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Site tab, and then choose Zip.

### Field location:

This section indicates where the Zip field you are working with is located. In this case, the field is on the Site tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Zip field is a whole Zip field.

Field name:

This is the first place on the Zip Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Zip" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

Hidden:

*No*

"No" is the default option here. "No" must be selected in order for system operators to see this field and the information it contains on the Site tab of the Site record.

*Yes*

If you do not want system operators to be able to view the Zip field on the Site tab of the Site record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

Require an entry:

*No*

If you select "No" it will be possible for the Zip field on the Site tab to be left blank in Volgistics, as well as at VIC.

*At VIC*

This selection requires that users always enter information in the Zip field at VIC, but system operators working within Volgistics will not be forced to enter information in this field.

*Always*

If you select "Always" it will not be possible for the Zip field on the Site tab to be left blank in Volgistics, or at VIC.

Default entry:

If you want a certain drop down item to appear in this field by default, you can select it here.

**System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

Power users

*View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

*View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

Basic users

*View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

*View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

*Hidden*

---

## Country Field Properties Setup Page

Help topic 2394

Added or revised 11-12-2008

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You can use the Country Field Properties setup page to configure the Country field on the Site tab in the Site record. To get to the Site tab Country Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Site tab, and then choose Country.

Field location:

This section indicates where the Country field you are working with is located. In this case, the field is on the Site tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Country field is a Dropdown field.

### Field name:

This is the first place on the Country Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Country" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

*No*

"No" must be selected in order for system operators to see this field and the information it contains on the Site tab of the Site record.

*Yes*

If you do not want system operators to be able to view the Country field on the Site tab of the Site record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

### Default entry:

If you want a certain drop down item to appear in this field by default, you can select it here. For example, if all or most of your organization's volunteers are from one Country, you can choose it as the default so that you can pass by this field when creating a new Site record.

### **Drop down table items**

#### *Add a new item:*

This is where a system operator enters the possible options for this drop down field. Each time you enter a new item and click the **Save** button, an additional "Add a new item:" field will be created so that you can continue to add drop down items for this field. If you no longer want to use a particular drop down item, click the **Delete** button next to the field containing that item.

### **System operator rights**

This section determines which types of [system operators \[pg:1895\]](#) can view, or view and change, this field in Volgistics.

#### Volgistics Administrators

##### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

##### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

### Power users

#### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

### *Hidden*

---

## **Home Field Properties Setup Page**

Help topic 2395

Added or revised 11-11-2008

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You can use the Home Field Properties setup page to configure the Home field on the Site tab in the Site record. To get to the Site tab Home Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Site tab, and then choose Home.

### Field location:

This section indicates where the Home field you are working with is located. In this case, the field is on the Site tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Home field is a phone number field.

There are six phone number format options. Select the way you would like to track Home phone numbers in your system from the drop down menu here.

Field name:

This is the first place on the Home Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Home" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

Hidden:

*No*

"No" is the default option here. "No" must be selected in order for system operators to see this field and the information it contains on the Site tab of the Site record.

*Yes*

If you do not want system operators to be able to view the Home field on the Site tab of the Site record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

Require an entry:

*No*

If you select "No" it will be possible for the Home phone number field on the Site tab to be left blank in Volgistics, as well as at VIC.

*At VIC*

This selection requires that users always enter a phone number in the Home field at VIC, but system operators working within Volgistics will not be forced to enter a number in this field.

*Always*

If you select "Always" it will not be possible for the Home field on the Site tab to be left blank in Volgistics, or at VIC.

Default entry:

If you want a certain drop down item to appear in this field by default, you can select it here.

**System operator rights**

This section determines which types of [system operators \[pg:1895\]](#) can view, or view and change, this field in Volgistics.

Volgistics Administrators



### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

### Power users

#### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Basic users from both editing and viewing this field.

### **Related help**

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## OK To Call Field Properties Setup Page

Help topic 2396

Added or revised 11-11-2008

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You can use the OK to call Field Properties setup page to configure the OK to call field on the Site tab in the Site record. To get to the Site tab OK to call Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Site tab, and then choose OK to call.

### Field location:

This section indicates where the OK to call field you are working with is located. In this case, the field is on the Site tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that this is an OK to call field.

### Field name:

The field is called "OK to call." This field name cannot be changed.

### Hidden:

No

"No" is the default option here. "No" must be selected in order for system operators to see this field and the information it contains on the Site tab of the Site record.

Yes

If you do not want system operators to be able to view the OK to call field on the Site tab of the Site record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

Whether or not it is hidden can become very important for this particular field. Consider the following scenario: If an OK to call field is used and volunteers indicate that certain numbers are "OK to call" and others are not "OK to call," and then the field is hidden, Volgistics users will not know whether or not a volunteer should be contacted at a particular number stored in the system.

### Default entry:

You can decide if the OK to call field on the Site tab is initially marked or unmarked in all new Site records by making the desired selection here.

### **System operator rights**

This section determines which types of [system operators \[pg:1895\]](#) can view, or view and change, this field in Volgistics.

### Volgistics Administrators

### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

### Power users

#### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

---

## **Email Field Properties Setup Page**

Help topic 2404

Added or revised 11-11-2008

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You can use the Email Field Properties setup page to configure the Email field on the Site tab in the Site record. To get to the Site tab Email Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Site tab, and then choose Email.

#### Field location:

This section indicates where the Email field you are working with is located. In this case, the field is on the Site tab.

#### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Email field is a Text field.

#### Field name:

This is the first place on the Email Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Email" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

#### Hidden:

*No*

"No" is the default option here. "No" must be selected in order for system operators to see this field and the information it contains on the Site tab of the Site record.

*Yes*

If you do not want system operators to be able to view the Email field on the Site tab of the Site record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

#### Require an entry:

*No*

If you select "No" it will be possible for the Email field on the Site tab to be left blank in Volgistics, as well as at VIC.

*At VIC*

If a volunteer has access to their personal information at VIC, they may either intentionally or inadvertently delete information stored in the Email field. If you select the "At VIC" option, the system will not allow them to log out with a blank Email field.

*Always*

If you select "Always" it will not be possible for the Email field on the Site tab to be left blank in Volgistics, or at VIC.

#### Default entry:

The Email field often contains no default entry. If, however, you want certain text to initially appear in the Email field on the Site tab in all new Site records, enter it here.

## **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

### Volgistics Administrators

#### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

#### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

### Power users

#### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

---

## Web site Field Properties Setup Page

Help topic 2405

Added or revised 11-11-2008

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You can use the Web site Field Properties setup page to configure the Web site field on the Site tab in the Site record. To get to the Site tab Web site Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Site tab, and then choose Web site.

### Field location:

This section indicates where the Web site field you are working with is located. In this case, the field is on the Site tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Web site field is a Text field.

### Field name:

This is the first place on the Web site Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Web site" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

No

"No" is the default option here. "No" must be selected in order for system operators to see this field and the information it contains on the Site tab of the Site record.

Yes

If you do not want system operators to be able to view the Web site field on the Site tab of the Site record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

### Require an entry:

No

If you select "No" it will be possible for the Web site field on the Site tab to be left blank in Volgistics, as well as at VIC.

*At VIC*

If a volunteer has access to their personal information at VIC, they may either intentionally or inadvertently delete information stored in the Web site field. If you select the "At VIC" option, the system will not allow them to log out with a blank Web site field.

## *Always*

If you select "Always" it will not be possible for the Web site field on the Site tab to be left blank in Volgistics, or at VIC.

### Default entry:

The Web site field often contains no default entry. If, however, you want certain text to initially appear in the Web site field on the Site tab in all new Site records, enter it here.

## **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

### Volgistics Administrators

#### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

#### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

### Power users

#### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

*Hidden*

---

## Spare Dropdown Field Properties Setup Page

Help topic 2406

Added or revised 11-14-2008

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You can use the Spare dropdown field properties setup page to configure a Spare dropdown field on the Site tab in the Site record. To get to the Spare dropdown field properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Site tab, and then choose the Spare dropdown field of interest.

### Field location:

This section indicates where the Spare dropdown field you are working with is located. In this case, the field is on the Site tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Spare dropdown field is a Dropdown field.

### Field name:

This is the first place on the Spare dropdown Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Spare dropdown" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

*No*

"No" must be selected in order for system operators to see this field and the information it contains on the Site tab of the Site record.

*Yes*

If you do not want system operators to be able to view this Spare dropdown field on the Site tab of the Site record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

### Require an entry:

*No*

If you select "No" it will be possible for the Spare dropdown field on the Site tab to be left blank in Volgistics, as well as at VIC.



### *At VIC*

This selection requires that users always enter information in this Spare dropdown field at VIC, but system operators working within Volgistics will not be forced to enter information in this field.

### *Always*

If you select "Always" it will not be possible for the Spare dropdown field on the Site tab to be left blank in Volgistics, or at VIC.

### Default entry:

If you want a certain drop down item to appear in this field by default, you can select it here.

### **Drop down table items**

#### *Add a new item:*

This is where a system operator enters the possible options for this drop down field. Each time you enter a new item and click the **Save** button, an additional "Add a new item:" field will be created so that you can continue to add drop down items for this field. If you no longer want to use a particular drop down item, click the **Delete** button next to the field containing that item.

### **System operator rights**

This section determines which types of [system operators \[pg:1895\]](#) can view, or view and change, this field in Volgistics.

#### Volgistics Administrators

##### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

##### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

##### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

#### Power users

##### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

##### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

Basic users

*View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

*View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

*Hidden*

---

## Spare Field Field Properties Setup Page

Help topic 2407

Added or revised 11-12-2008

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You can use the Spare field field properties setup page to configure a Spare field on the Site tab in the Site record. To get to the Spare field setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Site tab, and then choose the Spare field of interest.

Field location:

This section indicates where the Spare field you are working with is located. In this case, the field is on the Site tab.

Field format:

Information is stored in several types of fields in Volgistics. This section indicates that the Spare field can be customized to take the form any one of the following field types: Text; Date; Number (whole); Number (1 decimal place); Number (2 decimal places), or currency. Select the field type of interest from the Field format dropdown list.

Field name:

This is the first place on the Spare Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Spare field" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

Hidden:

*No*

"No" must be selected in order for system operators to see this field and the information it contains on the Site tab of the Site record.

*Yes*

If you do not want system operators to be able to view this Spare field on the Site tab of the Site record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

Require an entry:

*No*

If you select "No" it will be possible for this field on the Site tab to be left blank in Volgistics, as well as at VIC.

*At VIC*

This selection requires that users always enter information in this Spare field at VIC, but system operators working within Volgistics will not be forced to enter information in this field.

*Always*

If you select "Always" it will not be possible for this Spare field on the Site tab to be left blank in Volgistics, or at VIC.

Default entry:

If you want certain information to appear in this field by default, you can enter it here.

### **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

## Power users

### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

## Basic users

### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

### *Hidden*

---

## **Spare Checkbox Field Properties Setup Page**

Help topic 2408

Added or revised 11-12-2008

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You can use the Spare checkbox Field properties setup page to configure a Spare checkbox on the Site tab in the Site record. To get to the Spare checkbox Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Site tab, and then choose the Spare checkbox of interest.

### Field location:

This section indicates where the Spare checkbox you are working with is located. In this case, the checkbox is on the Site tab.

### Field format:

Information is stored in several types of fields in Volgistics. This section indicates that the Spare checkbox is a Checkbox field.

### Field name:

This is the first place on the Spare Checkbox Properties setup page where a system operator can make any adjustments to the field. The checkbox is called "Spare checkbox" by default. To change the name of the checkbox, delete the text from this field and enter the name you would like to change the checkbox to.

Hidden:

*No*

"No" must be selected in order for system operators to see this checkbox and the information it contains on the Site tab of the Site record.

*Yes*

If you do not want system operators to be able to view this Spare checkbox on the Site tab of the Site record, you can select "Yes" from the drop down list. When a checkbox is hidden, System operators will not see the checkbox or whether or not it was marked before the field was made hidden, but if the checkbox was marked before it was hidden, it will still be marked if you later unhide the checkbox.

Default entry:

If you want this checkbox to be checked by default, you can check the box here.

**System operator rights**

This section determines which types of [system operators \[pg:1895\]](#) can view, or view and change, this field in Volgistics.

Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

Power users

*View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

*View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

#### Basic users

##### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

##### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

##### *Hidden*

---

## Place Field Properties Setup Page

Help topic 2409

Added or revised 11-11-2008

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You can use the Place Field Properties setup page to configure the Place field on the Place tab in the Place record. To get to the Place tab Place Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Place tab, and then choose Place.

#### Field location:

This section indicates where the Place field you are working with is located. In this case, the field is on the Place tab.

#### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Place field is a Text field.

#### Default entry:

If you want a certain option to appear in this Place field on the Place tab in all new Place records, select it here.

### **System operator rights**

This section determines which types of [system operators \[pg:1895\]](#) can view, or view and change, this field in Volgistics.

#### Volgistics Administrators

##### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

### Power users

#### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

### *Hidden*

---

## **Type Field Properties Setup Page**

Help topic 2410

Added or revised 11-13-2008

---

You can use the Type field setup page to configure the Type field on the Place tab in the Place record. To get to the Type field setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Place tab, and then choose the Type field.

### Field location:

This section indicates where the Type field you are working with is located. In this case, the field is on the Place tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Type field is a Dropdown field.

### Field name:

This is the first place on the Type Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Type" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

*No*

"No" must be selected in order for system operators to see this field and the information it contains on the Place tab of the Place record.

*Yes*

If you do not want system operators to be able to view the Type field on the Place tab of the Place record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

### Default entry:

If you want a certain drop down item to appear in this field by default, you can select it here.

### **Drop down table items**

#### *Add a new item:*

This is where a system operator enters the possible options for this drop down field. Each time you enter a new item and click the **Save** button, an additional "Add a new item:" field will be created so that you can continue to add drop down items for this field. If you no longer want to use a particular drop down item, click the **Delete** button next to the field containing that item.

### **System operator rights**

This section determines which types of [system operators \[pg:1895\]](#) can view, or view and change, this field in Volgistics.

#### Volgistics Administrators

##### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

##### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.



### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

### Power users

#### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

### *Hidden*

---

## **Street Field Properties Setup Page**

Help topic 2411

Added or revised 11-11-2008

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You can use the Street Field Properties setup page to configure the Street field on the Place tab in the Place record. To get to the Place tab Street Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Place tab, and then choose Street.

### Field location:

This section indicates where the Street field you are working with is located. In this case, the field is on the Place tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Street field is a Text field.

Field name:

This is the first place on the Street Field Properties setup page where a system operator can make any adjustments to the field. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

Hidden:

*No*

"No" is the default option here. "No" must be selected in order for system operators to see this field and the information it contains on the Place tab of the Place record.

*Yes*

If you do not want system operators to be able to view the Street field on the Place tab of the Place record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

Require an entry:

*No*

If you select "No" it will be possible for the Street field on the Place tab to be left blank in Volgistics, as well as at VIC.

*At VIC*

This selection requires that users always enter information in this Street field at VIC, but system operators working within Volgistics will not be forced to enter information in this field.

*Always*

If you select "Always" it will not be possible for the Street field on the Place tab to be left blank in Volgistics, or at VIC.

Default entry:

If you want a certain option to appear in this Street field on the Place tab in all new Place records, select it here.

**System operator rights**

This section determines which types of [system operators \[pg:1895\]](#) can view, or view and change, this field in Volgistics.

Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

Power users

*View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

*View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

Basic users

*View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

*View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

*Hidden*

---

## City Field Properties Setup Page

Help topic 2412

Added or revised 11-11-2008

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You can use the City Field Properties setup page to configure the City field on the Place tab in the Place record. To get to the Place tab City Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Place tab, and then choose City.

Field location:

This section indicates where the City field you are working with is located. In this case, the field is on the Place tab.

Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the City field is a Text field.

Field name:

This is the first place on the City Field Properties setup page where a system operator can make any adjustments to the field. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

Hidden:

No

"No" is the default option here. "No" must be selected in order for system operators to see this field and the information it contains on the Place tab of the Place record.

Yes

If you do not want system operators to be able to view the City field on the Place tab of the Place record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

Require an entry:

No

If you select "No" it will be possible for the City field on the Place tab to be left blank in Volgistics, as well as at VIC.

*At VIC*

This selection requires that users always enter information in this City field at VIC, but system operators working within Volgistics will not be forced to enter information in this field.

*Always*

If you select "Always" it will not be possible for the City field on the Place tab to be left blank in Volgistics, or at VIC.

Default entry:

If you want a certain option to appear in this City field on the Place tab in all new Place records, select it here.

**System operator rights**

This section determines which types of [system operators \[pg:1895\]](#) can view, or view and change, this field in Volgistics.

## Volgistics Administrators

### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

## Power users

### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

## Basic users

### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

### *Hidden*

---

## State Field Properties Setup Page

Help topic 2413

Added or revised 11-11-2008

---

You can use the State Field Properties setup page to configure the State field on the Place tab in the Place record. To get to the Place tab State Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Place tab, and then choose State.

### Field location:

This section indicates where the State field you are working with is located. In this case, the field is on the Place tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the State field is a Dropdown field.

### Field name:

This is the first place on the State Field Properties setup page where a system operator can make any adjustments to the field. The field is called "State" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

*No*

"No" must be selected in order for system operators to see this field and the information it contains on the Place tab of the Place record.

*Yes*

If you do not want system operators to be able to view the State field on the Place tab of the Place record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

### Require an entry:

*No*

If you select "No" it will be possible for the State field on the Place tab to be left blank in Volgistics, as well as at VIC.

*At VIC*

This selection requires that users always enter information in this State field at VIC, but system operators working within Volgistics will not be forced to enter information in this field.

*Always*

If you select "Always" it will not be possible for the State field on the Place tab to be left blank in Volgistics, or at VIC.

#### Default entry:

If you want a certain drop down item to appear in this field by default, you can select it here. For example, if all or most of your organization's volunteers are from one state, you can choose it as the default so that you can pass by this field when creating a new Place record.

#### **Drop down table items**

##### *Add a new item:*

This is where a system operator enters the possible options for this drop down field. Each time you enter a new item and click the **Save** button, an additional "Add a new item:" field will be created so that you can continue to add drop down items for this field. If you no longer want to use a particular drop down item, click the **Delete** button next to the field containing that item.

#### **System operator rights**

This section determines which types of [system operators \[pg:1895\]](#) can view, or view and change, this field in Volgistics.

##### Volgistics Administrators

##### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

##### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

##### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

##### Power users

##### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

##### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

##### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

## Basic users

### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

### *Hidden*

---

## **Zip Field Properties Setup Page**

Help topic 2414

Added or revised 11-11-2008

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You can use the Zip Field Properties setup page to configure the Zip field on the Place tab in the Place record. To get to the Place tab Zip Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Place tab, and then choose Zip.

### Field location:

This section indicates where the Zip field you are working with is located. In this case, the field is on the Place tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Zip field is a whole Zip field.

### Field name:

This is the first place on the Zip Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Zip" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

*No*

"No" is the default option here. "No" must be selected in order for system operators to see this field and the information it contains on the Place tab of the Place record.

*Yes*

If you do not want system operators to be able to view the Zip field on the Place tab of the Place record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.



Require an entry:

*No*

If you select "No" it will be possible for the Zip field on the Place tab to be left blank in Volgistics, as well as at VIC.

*At VIC*

This selection requires that users always enter information in the Zip field at VIC, but system operators working within Volgistics will not be forced to enter information in this field.

*Always*

If you select "Always" it will not be possible for the Zip field on the Place tab to be left blank in Volgistics, or at VIC.

Default entry:

If you want a certain drop down item to appear in this field by default, you can select it here.

**System operator rights**

This section determines which types of [system operators \[pg:1895\]](#) can view, or view and change, this field in Volgistics.

Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

Power users

*View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

*View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

### *Hidden*

---

## **Country Field Properties Setup Page**

Help topic 2415

Added or revised 11-12-2008

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You can use the Country Field Properties setup page to configure the Country field on the Place tab in the Place record. To get to the Place tab Country Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Place tab, and then choose Country.

### Field location:

This section indicates where the Country field you are working with is located. In this case, the field is on the Place tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Country field is a Dropdown field.

### Field name:

This is the first place on the Country Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Country" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

*No*

"No" must be selected in order for system operators to see this field and the information it contains on the Place tab of the Place record.

Yes

If you do not want system operators to be able to view the Country field on the Place tab of the Place record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

Default entry:

If you want a certain drop down item to appear in this field by default, you can select it here. For example, if all or most of your organization's volunteers are from one Country, you can choose it as the default so that you can pass by this field when creating a new Place record.

**Drop down table items**

*Add a new item:*

This is where a system operator enters the possible options for this drop down field. Each time you enter a new item and click the **Save** button, an additional "Add a new item:" field will be created so that you can continue to add drop down items for this field. If you no longer want to use a particular drop down item, click the **Delete** button next to the field containing that item.

**System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

Power users

*View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

*View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

### *Hidden*

---

## Home Field Properties Setup Page

Help topic 2416

Added or revised 11-11-2008

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You can use the Home Field Properties setup page to configure the Home field on the Place tab in the Place record. To get to the Place tab Home Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Place tab, and then choose Home.

### Field location:

This section indicates where the Home field you are working with is located. In this case, the field is on the Place tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Home field is a phone number field.

There are six phone number format options. Select the way you would like to track Home phone numbers in your system from the drop down menu here.

### Field name:

This is the first place on the Home Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Home" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

*No*

"No" is the default option here. "No" must be selected in order for system operators to see this field and the information it contains on the Place tab of the Place record.

Yes

If you do not want system operators to be able to view the Home field on the Place tab of the Place record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

Require an entry:

No

If you select "No" it will be possible for the Home phone number field on the Place tab to be left blank in Volgistics, as well as at VIC.

*At VIC*

This selection requires that users always enter a phone number in the Home field at VIC, but system operators working within Volgistics will not be forced to enter a number in this field.

*Always*

If you select "Always" it will not be possible for the Home field on the Place tab to be left blank in Volgistics, or at VIC.

Default entry:

If you want a certain drop down item to appear in this field by default, you can select it here.

### **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

Power users

*View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

#### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Basic users from both editing and viewing this field.

### **Related help**

---

## **OK To Call Field Properties Setup Page**

Help topic 2417

Added or revised 11-11-2008

---

You can use the OK to call Field Properties setup page to configure the OK to call field on the Place tab in the Place record. To get to the Place tab OK to call Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Place tab, and then choose OK to call.

#### Field location:

This section indicates where the OK to call field you are working with is located. In this case, the field is on the Place tab.

#### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that this is an OK to call field.

#### Field name:

The field is called "OK to call." This field name cannot be changed.

### Hidden:

*No*

"No" is the default option here. "No" must be selected in order for system operators to see this field and the information it contains on the Place tab of the Place record.

*Yes*

If you do not want system operators to be able to view the OK to call field on the Place tab of the Place record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

Whether or not it is hidden can become very important for this particular field. Consider the following scenario: If an OK to call field is used and volunteers indicate that certain numbers are "OK to call" and others are not "OK to call," and then the field is hidden, Volgistics users will not know whether or not a volunteer should be contacted at a particular number stored in the system.

### Default entry:

You can decide if the OK to call field on the Place tab is initially marked or unmarked in all new Place records by making the desired selection here.

### **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

#### Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

#### Power users

*View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

*View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

Basic users

*View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

*View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

*Hidden*

---

## Email Field Properties Setup Page

Help topic 2423

Added or revised 11-11-2008

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You can use the Email Field Properties setup page to configure the Email field on the Place tab in the Place record. To get to the Place tab Email Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Place tab, and then choose Email.

Field location:

This section indicates where the Email field you are working with is located. In this case, the field is on the Place tab.

Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Email field is a Text field.

Field name:

This is the first place on the Email Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Email" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

Hidden:

*No*

"No" is the default option here. "No" must be selected in order for system operators to see this field and the information it contains on the Place tab of the Place record.



Yes

If you do not want system operators to be able to view the Email field on the Place tab of the Place record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

Require an entry:

No

If you select "No" it will be possible for the Email field on the Place tab to be left blank in Volgistics, as well as at VIC.

*At VIC*

If a volunteer has access to their personal information at VIC, they may either intentionally or inadvertently delete information stored in the Email field. If you select the "At VIC" option, the system will not allow them to log out with a blank Email field.

*Always*

If you select "Always" it will not be possible for the Email field on the Place tab to be left blank in Volgistics, or at VIC.

Default entry:

The Email field often contains no default entry. If, however, you want certain text to initially appear in the Email field on the Place tab in all new Place records, enter it here.

### **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

#### Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

#### Power users

### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

---

## **Web Site Field Properties Setup Page**

Help topic 2424

Added or revised 11-11-2008

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You can use the Web Site Field Properties setup page to configure the Web Site field on the Place tab in the Place record. To get to the Place tab Web Site Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Place tab, and then choose Web Site.

### Field location:

This section indicates where the Web Site field you are working with is located. In this case, the field is on the Place tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Web Site field is a Text field.

### Field name:

This is the first place on the Web Site Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Web Site" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

#### *No*

"No" is the default option here. "No" must be selected in order for system operators to see this field and the information it contains on the Place tab of the Place record.

#### *Yes*

If you do not want system operators to be able to view the Web Site field on the Place tab of the Place record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

### Require an entry:

#### *No*

If you select "No" it will be possible for the Web Site field on the Place tab to be left blank in Volgistics, as well as at VIC.

#### *At VIC*

If a volunteer has access to their personal information at VIC, they may either intentionally or inadvertently delete information stored in the Web Site field. If you select the "At VIC" option, the system will not allow them to log out with a blank Web Site field.

#### *Always*

If you select "Always" it will not be possible for the Web Site field on the Place tab to be left blank in Volgistics, or at VIC.

### Default entry:

The Web Site field often contains no default entry. If, however, you want certain text to initially appear in the Web Site field on the Place tab in all new Place records, enter it here.

## **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

### Volgistics Administrators

#### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

#### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

### Power users

#### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

### *Hidden*

---

## **Spare Dropdown Field Properties Setup Page**

Help topic 2425

Added or revised 11-14-2008

---

You can use the Spare dropdown field properties setup page to configure a Spare dropdown field on the Place tab in the Place record. To get to the Spare dropdown field properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Place tab, and then choose the Spare dropdown field of interest.

### Field location:

This section indicates where the Spare dropdown field you are working with is located. In this case, the field is on the Place tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Spare dropdown field is a Dropdown field.

### Field name:

This is the first place on the Spare dropdown Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Spare dropdown" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

*No*

"No" must be selected in order for system operators to see this field and the information it contains on the Place tab of the Place record.

*Yes*

If you do not want system operators to be able to view this Spare dropdown field on the Place tab of the Place record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

### Require an entry:

*No*

If you select "No" it will be possible for the Spare dropdown field on the Place tab to be left blank in Volgistics, as well as at VIC.

*At VIC*

This selection requires that users always enter information in this Spare dropdown field at VIC, but system operators working within Volgistics will not be forced to enter information in this field.

*Always*

If you select "Always" it will not be possible for the Spare dropdown field on the Place tab to be left blank in Volgistics, or at VIC.

### Default entry:

If you want a certain drop down item to appear in this field by default, you can select it here.

### **Drop down table items**

*Add a new item:*

This is where a system operator enters the possible options for this drop down field. Each time you enter a new item and click the **Save** button, an additional "Add a new item:" field will be created so that you can continue to add drop down items for this field. If you no longer want to use a particular drop down item, click the **Delete** button next to the field containing that item.

### **System operator rights**

This section determines which types of [system operators \[pg:1895\]](#) can view, or view and change, this field in Volgistics.

#### Volgistics Administrators

##### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

##### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

##### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

#### Power users

##### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

##### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

##### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

#### Basic users

##### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

##### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

##### *Hidden*

---

## Spare Field Field Properties Setup Page

Help topic 2426

Added or revised 11-12-2008

---

You can use the Spare field field properties setup page to configure a Spare field on the Place tab in the Place record. To get to the Spare field setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Place tab, and then choose the Spare field of interest.

### Field location:

This section indicates where the Spare field you are working with is located. In this case, the field is on the Place tab.

### Field format:

Information is stored in several types of fields in Volgistics. This section indicates that the Spare field can be customized to take the form any one of the following field types: Text; Date; Number (whole); Number (1 decimal place); Number (2 decimal places), or currency. Select the field type of interest from the Field format dropdown list.

### Field name:

This is the first place on the Spare Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Spare field" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

No

"No" must be selected in order for system operators to see this field and the information it contains on the Place tab of the Place record.

Yes

If you do not want system operators to be able to view this Spare field on the Place tab of the Place record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

### Require an entry:

No

If you select "No" it will be possible for this field on the Place tab to be left blank in Volgistics, as well as at VIC.

*At VIC*

This selection requires that users always enter information in this Spare field at VIC, but system operators working within Volgistics will not be forced to enter information in this field.

*Always*

If you select "Always" it will not be possible for this Spare field on the Place tab to be left blank in Volgistics, or at VIC.

Default entry:

If you want certain information to appear in this field by default, you can enter it here.

### **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

Power users

*View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

*View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

Basic users

*View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.



## *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

## *Hidden*

---

# Spare Checkbox Field Properties Setup Page

Help topic 2427

Added or revised 11-12-2008

---

You can use the Spare checkbox Field properties setup page to configure a Spare checkbox on the Place tab in the Place record. To get to the Spare checkbox Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Place tab, and then choose the Spare checkbox of interest.

### Field location:

This section indicates where the Spare checkbox you are working with is located. In this case, the checkbox is on the Place tab.

### Field format:

Information is stored in several types of fields in Volgistics. This section indicates that the Spare checkbox is a Checkbox field.

### Field name:

This is the first place on the Spare Checkbox Properties setup page where a system operator can make any adjustments to the field. The checkbox is called "Spare checkbox" by default. To change the name of the checkbox, delete the text from this field and enter the name you would like to change the checkbox to.

### Hidden:

*No*

"No" must be selected in order for system operators to see this checkbox and the information it contains on the Place tab of the Place record.

*Yes*

If you do not want system operators to be able to view this Spare checkbox on the Place tab of the Place record, you can select "Yes" from the drop down list. When a checkbox is hidden, System operators will not see the checkbox or whether or not it was marked before the field was made hidden, but if the checkbox was marked before it was hidden, it will still be marked if you later unhide the checkbox.

### Default entry:

If you want this checkbox to be checked by default, you can check the box here.

## **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

### Volgistics Administrators

#### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

#### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

### Power users

#### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

---

## Assignment Field Properties Setup Page

Help topic 2428

Added or revised 11-11-2008

---

You can use the Assignment Field Properties setup page to configure the Assignment field on the Assignment tab in the Assignment record. To get to the Assignment tab Assignment Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Assignment tab, and then choose Assignment.

### Field location:

This section indicates where the Assignment field you are working with is located. In this case, the field is on the Assignment tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Assignment field is a Text field.

### Default entry:

If you want a certain option to appear in this Assignment field on the Assignment tab in all new Assignment records, select it here.

### **System operator rights**

This section determines which types of [system operators \[pg:1895\]](#) can view, or view and change, this field in Volgistics.

#### Volgistics Administrators

##### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

##### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

##### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

#### Power users

##### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

##### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

Basic users

*View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

*View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

*Hidden*

---

## Cluster Field Properties Setup Page

Help topic 2429

Added or revised 07-14-2016

---

You can use the Cluster field properties setup page to configure a Cluster field on the Assignment tab in the Assignment record. To get to the Cluster field properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Assignment tab, and then choose the Cluster field.

Field location:

This section indicates where the Cluster field you are working with is located. In this case, the field is on the Assignment tab.

Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Cluster field is a Dropdown field.

Field name:

This is the first place on the Cluster Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Cluster" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

Hidden:

*No*

"No" must be selected in order for system operators to see this field and the information it contains on the Assignment tab of the Assignment record.

**Yes**

If you do not want system operators to be able to view this Cluster field on the Assignment tab of the Assignment record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

Require an entry:

**No**

If you select "No" it will be possible for the Cluster field on the Assignment tab to be left blank in Volgistics.

**Yes**

If you select "Yes" it will not be possible for the Cluster field on the Assignment tab to be left blank in Volgistics.

Default entry:

If you want a certain drop down item to appear in this field by default, you can select it here.

### **Drop down table items**

*Add a new item:*

This is where a system operator enters the possible options for this drop down field. Each time you enter a new item and click the **Save** button, an additional "Add a new item:" field will be created so that you can continue to add drop down items for this field. If you no longer want to use a particular drop down item, click the **Delete** button next to the field containing that item.

### **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

## Power users

### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

## Basic users

### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Basic users from both editing and viewing this field.

## **Related help**

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# **Status Field Properties Setup Page**

Help topic 2430

Added or revised 11-14-2008

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You can use the Status field properties setup page to configure a Status field on the Assignment tab in the Assignment record. To get to the Status field properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Assignment tab, and then choose the Status field.

### Field location:

This section indicates where the Status field you are working with is located. In this case, the field is on the Assignment tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Status field is a Dropdown field.

Field name:

This is the first place on the Status Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Status" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

Hidden:

*No*

"No" must be selected in order for system operators to see this field and the information it contains on the Assignment tab of the Assignment record.

*Yes*

If you do not want system operators to be able to view this Status field on the Assignment tab of the Assignment record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

Default entry:

If you want a certain drop down item to appear in this field by default, you can select it here.

**System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

Power users

*View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

### *Hidden*

---

## **Advertise Field Properties Setup Page**

Help topic 2431

Added or revised 11-14-2008

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You can use the Advertise field properties setup page to configure a Advertise field on the Assignment tab in the Assignment record. To get to the Advertise field properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Assignment tab, and then choose the Advertise field of interest.

### Field location:

This section indicates where the Advertise field you are working with is located. In this case, the field is on the Assignment tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Advertise field is a Checkbox field.

### Field name:

This is the first place on the Advertise Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Advertise" by default, and it cannot be changed.

### Hidden:

*No*



"No" must be selected in order for system operators to see this field and the information it contains on the Assignment tab of the Assignment record.

Yes

If you do not want system operators to be able to view this Advertise field on the Assignment tab of the Assignment record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

Default entry:

If you want the Advertise checkbox to be checked by default, you can select mark the box here.

### **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

#### Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

#### Power users

*View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

*View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

#### Basic users

### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

### *Hidden*

---

## **Sign-in Option Field Properties Setup Page**

Help topic 2432

Added or revised 11-14-2008

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You can use the Sign-in option field properties setup page to configure a Sign-in option field on the Assignment tab in the Assignment record. To get to the Sign-in option field properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Assignment tab, and then choose the Sign-in option field of interest.

### Field location:

This section indicates where the Sign-in option field you are working with is located. In this case, the field is on the Assignment tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Sign-in option field is a Checkbox field.

### Field name:

This is the first place on the Sign-in option Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Sign-in option" by default, and it cannot be changed.

### Hidden:

*No*

"No" must be selected in order for system operators to see this field and the information it contains on the Assignment tab of the Assignment record.

*Yes*

If you do not want system operators to be able to view this Sign-in option field on the Assignment tab of the Assignment record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

### Default entry:

If you want the Sign-in option checkbox to be checked by default, you can select mark the box here.

## **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

### Volgistics Administrators

#### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

#### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

### Power users

#### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

---

## Schedule Reminders Field Properties Setup Page

Help topic 2433

Added or revised 11-14-2008

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You can use the Schedule reminders field properties setup page to configure a Schedule reminders field on the Assignment tab in the Assignment record. To get to the Schedule reminders field properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Assignment tab, and then choose the Schedule reminders field of interest.

### Field location:

This section indicates where the Schedule reminders field you are working with is located. In this case, the field is on the Assignment tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Schedule reminders field is a Checkbox field.

### Field name:

This is the first place on the Schedule reminders Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Schedule reminders" by default, and it cannot be changed.

### Hidden:

No

"No" must be selected in order for system operators to see this field and the information it contains on the Assignment tab of the Assignment record.

Yes

If you do not want system operators to be able to view this Schedule reminders field on the Assignment tab of the Assignment record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

### Default entry:

If you want the Schedule reminders checkbox to be checked by default, you can select mark the box here.

### **System operator rights**

This section determines which types of [system operators \[pg:1895\]](#) can view, or view and change, this field in Volgistics.

## Volgistics Administrators

### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

## Power users

### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

## Basic users

### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

### *Hidden*

---

## Street Field Properties Setup Page

Help topic 2434

Added or revised 11-11-2008

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You can use the Street Field Properties setup page to configure the Street field on the Assignment tab in the Assignment record. To get to the Assignment tab Street Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Assignment tab, and then choose Street.

### Field location:

This section indicates where the Street field you are working with is located. In this case, the field is on the Assignment tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Street field is a Text field.

### Field name:

This is the first place on the Street Field Properties setup page where a system operator can make any adjustments to the field. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

*No*

"No" is the default option here. "No" must be selected in order for system operators to see this field and the information it contains on the Assignment tab of the Assignment record.

*Yes*

If you do not want system operators to be able to view the Street field on the Assignment tab of the Assignment record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

### Require an entry:

*No*

If you select "No" it will be possible for the Street field on the Assignment tab to be left blank in Volgistics, as well as at VIC.

*At VIC*

This selection requires that users always enter information in this Street field at VIC, but system operators working within Volgistics will not be forced to enter information in this field.

*Always*

If you select "Always" it will not be possible for the Street field on the Assignment tab to be left blank in Volgistics, or at VIC.

Default entry:

If you want a certain option to appear in this Street field on the Assignment tab in all new Assignment records, select it here.

**System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

Power users

*View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

*View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

Basic users

*View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

*View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

*Hidden*

---

## City Field Properties Setup Page

Help topic 2435

Added or revised 11-20-2008

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You can use the City Field Properties setup page to configure the City field on the Assignment tab in the Assignment record. To get to the Assignment tab City Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Assignment tab, and then choose City.

### Field location:

This section indicates where the City field you are working with is located. In this case, the field is on the Assignment tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the City field is a Text field.

### Field name:

This is the first place on the City Field Properties setup page where a system operator can make any adjustments to the field. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

*No*

"No" is the default option here. "No" must be selected in order for system operators to see this field and the information it contains on the Assignment tab of the Assignment record.

*Yes*

If you do not want system operators to be able to view the City field on the Assignment tab of the Assignment record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

### Require an entry:

*No*

If you select "No" it will be possible for the City field on the Assignment tab to be left blank in Volgistics, as well as at VIC.



### *At VIC*

This selection requires that users always enter information in this City field at VIC, but system operators working within Volgistics will not be forced to enter information in this field.

### *Always*

If you select "Always" it will not be possible for the City field on the Assignment tab to be left blank in Volgistics, or at VIC.

### Default entry:

If you want a certain option to appear in this City field on the Assignment tab in all new Assignment records, select it here.

## **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

### Volgistics Administrators

#### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

#### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

### Power users

#### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

### Basic users

### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

### *Hidden*

---

## State Field Properties Setup Page

Help topic 2436

Added or revised 11-11-2008

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You can use the State Field Properties setup page to configure the State field on the Assignment tab in the Assignment record. To get to the Assignment tab State Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Assignment tab, and then choose State.

### Field location:

This section indicates where the State field you are working with is located. In this case, the field is on the Assignment tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the State field is a Dropdown field.

### Field name:

This is the first place on the State Field Properties setup page where a system operator can make any adjustments to the field. The field is called "State" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

No

"No" must be selected in order for system operators to see this field and the information it contains on the Assignment tab of the Assignment record.

Yes

If you do not want system operators to be able to view the State field on the Assignment tab of the Assignment record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

### Require an entry:

*No*

If you select "No" it will be possible for the State field on the Assignment tab to be left blank in Volgistics, as well as at VIC.

*At VIC*

This selection requires that users always enter information in this State field at VIC, but system operators working within Volgistics will not be forced to enter information in this field.

*Always*

If you select "Always" it will not be possible for the State field on the Assignment tab to be left blank in Volgistics, or at VIC.

Default entry:

If you want a certain drop down item to appear in this field by default, you can select it here. For example, if all or most of your organization's volunteers are from one state, you can choose it as the default so that you can pass by this field when creating a new Assignment record.

### **Drop down table items**

*Add a new item:*

This is where a system operator enters the possible options for this drop down field. Each time you enter a new item and click the **Save** button, an additional "Add a new item:" field will be created so that you can continue to add drop down items for this field. If you no longer want to use a particular drop down item, click the **Delete** button next to the field containing that item.

### **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

Power users

### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

---

## **Zip Field Properties Setup Page**

Help topic 2437

Added or revised 11-11-2008

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You can use the Zip Field Properties setup page to configure the Zip field on the Assignment tab in the Assignment record. To get to the Assignment tab Zip Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Assignment tab, and then choose Zip.

### Field location:

This section indicates where the Zip field you are working with is located. In this case, the field is on the Assignment tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Zip field is a whole Zip field.

### Field name:

This is the first place on the Zip Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Zip" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

Hidden:

*No*

"No" is the default option here. "No" must be selected in order for system operators to see this field and the information it contains on the Assignment tab of the Assignment record.

*Yes*

If you do not want system operators to be able to view the Zip field on the Assignment tab of the Assignment record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

Require an entry:

*No*

If you select "No" it will be possible for the Zip field on the Assignment tab to be left blank in Volgistics, as well as at VIC.

*At VIC*

This selection requires that users always enter information in the Zip field at VIC, but system operators working within Volgistics will not be forced to enter information in this field.

*Always*

If you select "Always" it will not be possible for the Zip field on the Assignment tab to be left blank in Volgistics, or at VIC.

Default entry:

If you want a certain drop down item to appear in this field by default, you can select it here.

**System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

#### Power users

##### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

##### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

##### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

#### Basic users

##### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

##### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

##### *Hidden*

---

## **Country Field Properties Setup Page**

Help topic 2438

Added or revised 11-12-2008

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You can use the Country Field Properties setup page to configure the Country field on the Assignment tab in the Assignment record. To get to the Assignment tab Country Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Assignment tab, and then choose Country.

#### Field location:

This section indicates where the Country field you are working with is located. In this case, the field is on the Assignment tab.

#### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Country field is a Dropdown field.

### Field name:

This is the first place on the Country Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Country" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

*No*

"No" must be selected in order for system operators to see this field and the information it contains on the Assignment tab of the Assignment record.

*Yes*

If you do not want system operators to be able to view the Country field on the Assignment tab of the Assignment record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

### Default entry:

If you want a certain drop down item to appear in this field by default, you can select it here. For example, if all or most of your organization's volunteers are from one Country, you can choose it as the default so that you can pass by this field when creating a new Assignment record.

### **Drop down table items**

#### *Add a new item:*

This is where a system operator enters the possible options for this drop down field. Each time you enter a new item and click the **Save** button, an additional "Add a new item:" field will be created so that you can continue to add drop down items for this field. If you no longer want to use a particular drop down item, click the **Delete** button next to the field containing that item.

### **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

#### Volgistics Administrators

##### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

##### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

##### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

#### Power users

##### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

##### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

##### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

#### Basic users

##### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

##### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

##### *Hidden*

---

## **Home Field Properties Setup Page**

Help topic 2439

Added or revised 11-11-2008

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You can use the Home Field Properties setup page to configure the Home field on the Assignment tab in the Assignment record. To get to the Assignment tab Home Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Assignment tab, and then choose Home.

#### Field location:

This section indicates where the Home field you are working with is located. In this case, the field is on the Assignment tab.

#### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Home field is a phone number field.



There are six phone number format options. Select the way you would like to track Home phone numbers in your system from the drop down menu here.

Field name:

This is the first place on the Home Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Home" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

Hidden:

*No*

"No" is the default option here. "No" must be selected in order for system operators to see this field and the information it contains on the Assignment tab of the Assignment record.

*Yes*

If you do not want system operators to be able to view the Home field on the Assignment tab of the Assignment record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

Require an entry:

*No*

If you select "No" it will be possible for the Home phone number field on the Assignment tab to be left blank in Volgistics, as well as at VIC.

*At VIC*

This selection requires that users always enter a phone number in the Home field at VIC, but system operators working within Volgistics will not be forced to enter a number in this field.

*Always*

If you select "Always" it will not be possible for the Home field on the Assignment tab to be left blank in Volgistics, or at VIC.

Default entry:

If you want a certain drop down item to appear in this field by default, you can select it here.

**System operator rights**

This section determines which types of [system operators \[pg:1895\]](#) can view, or view and change, this field in Volgistics.

Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

Power users

*View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

*View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

Basic users

*View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

*View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Basic users from both editing and viewing this field.

**Related help**

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## OK To Call Field Properties Setup Page

Help topic 2440

Added or revised 11-11-2008

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You can use the OK to call Field Properties setup page to configure the OK to call field on the Assignment tab in the Assignment record. To get to the Assignment tab OK to call Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Assignment tab, and then choose OK to call.

### Field location:

This section indicates where the OK to call field you are working with is located. In this case, the field is on the Assignment tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that this is an OK to call field.

### Field name:

The field is called "OK to call." This field name cannot be changed.

### Hidden:

No

"No" is the default option here. "No" must be selected in order for system operators to see this field and the information it contains on the Assignment tab of the Assignment record.

Yes

If you do not want system operators to be able to view the OK to call field on the Assignment tab of the Assignment record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

Whether or not it is hidden can become very important for this particular field. Consider the following scenario: If an OK to call field is used and volunteers indicate that certain numbers are "OK to call" and others are not "OK to call," and then the field is hidden, Volgistics users will not know whether or not a volunteer should be contacted at a particular number stored in the system.

### Default entry:

You can decide if the OK to call field on the Assignment tab is initially marked or unmarked in all new Assignment records by making the desired selection here.

### **System operator rights**

This section determines which types of [system operators \[pg:1895\]](#) can view, or view and change, this field in Volgistics.

### Volgistics Administrators

### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

### Power users

#### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

---

## **Email Field Properties Setup Page**

Help topic 2446

Added or revised 11-11-2008

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You can use the Email Field Properties setup page to configure the Email field on the Assignment tab in the Assignment record. To get to the Assignment tab Email Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Assignment tab, and then choose Email.

Field location:

This section indicates where the Email field you are working with is located. In this case, the field is on the Assignment tab.

Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Email field is a Text field.

Field name:

This is the first place on the Email Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Email" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

Hidden:

*No*

"No" is the default option here. "No" must be selected in order for system operators to see this field and the information it contains on the Assignment tab of the Assignment record.

*Yes*

If you do not want system operators to be able to view the Email field on the Assignment tab of the Assignment record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

Require an entry:

*No*

If you select "No" it will be possible for the Email field on the Assignment tab to be left blank in Volgistics, as well as at VIC.

*At VIC*

If a volunteer has access to their personal information at VIC, they may either intentionally or inadvertently delete information stored in the Email field. If you select the "At VIC" option, the system will not allow them to log out with a blank Email field.

*Always*

If you select "Always" it will not be possible for the Email field on the Assignment tab to be left blank in Volgistics, or at VIC.

Default entry:

The Email field often contains no default entry. If, however, you want certain text to initially appear in the Email field on the Assignment tab in all new Assignment records, enter it here.

## **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

### Volgistics Administrators

#### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

#### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

### Power users

#### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

---

## Web Site Field Properties Setup Page

Help topic 2447

Added or revised 11-11-2008

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You can use the Web Site Field Properties setup page to configure the Web Site field on the Assignment tab in the Assignment record. To get to the Assignment tab Web Site Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Assignment tab, and then choose Web Site.

### Field location:

This section indicates where the Web Site field you are working with is located. In this case, the field is on the Assignment tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Web Site field is a Text field.

### Field name:

This is the first place on the Web Site Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Web Site" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

No

"No" is the default option here. "No" must be selected in order for system operators to see this field and the information it contains on the Assignment tab of the Assignment record.

Yes

If you do not want system operators to be able to view the Web Site field on the Assignment tab of the Assignment record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

### Require an entry:

No

If you select "No" it will be possible for the Web Site field on the Assignment tab to be left blank in Volgistics, as well as at VIC.

*At VIC*

If a volunteer has access to their personal information at VIC, they may either intentionally or inadvertently delete information stored in the Web Site field. If you select the "At VIC" option, the system will not allow them to log out with a blank Web Site field.

*Always*

If you select "Always" it will not be possible for the Web Site field on the Assignment tab to be left blank in Volgistics, or at VIC.

Default entry:

The Web Site field often contains no default entry. If, however, you want certain text to initially appear in the Web Site field on the Assignment tab in all new Assignment records, enter it here.

### **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

#### Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

#### Power users

*View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

*View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

#### Basic users

*View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

*View*



Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

*Hidden*

---

## Minimum Age Field Setup Page

Help topic 2448

Added or revised 11-17-2008

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You can use the Minimum age field setup page to configure the Minimum age field on the Assignment tab in the Assignment record. To get to the Minimum age field setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Assignment, and then choose Minimum age.

### Field location:

This section indicates where the Minimum age field you are working with is located. In this case, the field is on the Assignment tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that this is an Age field.

### Field name:

This is the first place on the Age Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Minimum age" by default. It cannot be changed.

### Hidden:

*No*

"No" must be selected in order for system operators to see this field and the information it contains on the Profile tab of the volunteer record.

*Yes*

If you do not want system operators to be able to view the Age field on the Profile tab of the volunteer record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

### Default entry:

If you would like a specific age to appear as the default minimum age for your Assignments, enter that age here. For example, it may make sense in some organizations for the default minimum age to be set as 18.

### **System operator rights**

This section determines which types of [system operators \[pg:1895\]](#) can view, or view and change, this field in Volgistics.

## Volgistics Administrators

### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

## Power users

### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

## Basic users

### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

### *Hidden*

---

## Spare Dropdown Field Properties Setup Page

Help topic 2449

Added or revised 07-14-2016

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You can use the Spare dropdown field properties setup page to configure a Spare dropdown field on the Assignment tab in the Assignment record. To get to the Spare dropdown field properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Assignment tab, and then choose the Spare dropdown field of interest.

### Field location:

This section indicates where the Spare dropdown field you are working with is located. In this case, the field is on the Assignment tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Spare dropdown field is a Dropdown field.

### Field name:

This is the first place on the Spare dropdown Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Spare dropdown" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

No

"No" must be selected in order for system operators to see this field and the information it contains on the Assignment tab of the Assignment record.

Yes

If you do not want system operators to be able to view this Spare dropdown field on the Assignment tab of the Assignment record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

### Require an entry:

No

If you select "No" it will be possible for the Spare dropdown field on the Assignment tab to be left blank in Volgistics.

Yes

If you select "Yes" it will not be possible for the Spare dropdown field on the Assignment tab to be left blank in Volgistics.

### Default entry:

If you want a certain drop down item to appear in this field by default, you can select it here.

### **Drop down table items**

#### *Add a new item:*

This is where a system operator enters the possible options for this drop down field. Each time you enter a new item and click the **Save** button, an additional "Add a new item:" field will be created so that you can continue to add drop down items for this field. If you no longer want to use a particular drop down item, click the **Delete** button next to the field containing that item.

### **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

#### Volgistics Administrators

##### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

##### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

##### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

#### Power users

##### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

##### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

##### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

#### Basic users

##### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

---

## Spare Field Field Properties Setup Page

Help topic 2450

Added or revised 11-12-2008

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You can use the Spare field field properties setup page to configure a Spare field on the Assignment tab in the Assignment record. To get to the Spare field setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Assignment tab, and then choose the Spare field of interest.

#### Field location:

This section indicates where the Spare field you are working with is located. In this case, the field is on the Assignment tab.

#### Field format:

Information is stored in several types of fields in Volgistics. This section indicates that the Spare field can be customized to take the form any one of the following field types: Text; Date; Number (whole); Number (1 decimal place); Number (2 decimal places), or currency. Select the field type of interest from the Field format dropdown list.

#### Field name:

This is the first place on the Spare Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Spare field" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

#### Hidden:

*No*

"No" must be selected in order for system operators to see this field and the information it contains on the Assignment tab of the Assignment record.

*Yes*

If you do not want system operators to be able to view this Spare field on the Assignment tab of the Assignment record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

Require an entry:

*No*

If you select "No" it will be possible for this field on the Assignment tab to be left blank in Volgistics, as well as at VIC.

*At VIC*

This selection requires that users always enter information in this Spare field at VIC, but system operators working within Volgistics will not be forced to enter information in this field.

*Always*

If you select "Always" it will not be possible for this Spare field on the Assignment tab to be left blank in Volgistics, or at VIC.

Default entry:

If you want certain information to appear in this field by default, you can enter it here.

**System operator rights**

This section determines which types of [system operators \[pg:1895\]](#) can view, or view and change, this field in Volgistics.

Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

Power users

*View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

*View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

### *Hidden*

---

## **Spare Checkbox Field Properties Setup Page**

Help topic 2451

Added or revised 11-12-2008

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You can use the Spare checkbox Field properties setup page to configure a Spare checkbox on the Assignment tab in the Assignment record. To get to the Spare checkbox Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Assignment tab, and then choose the Spare checkbox of interest.

### Field location:

This section indicates where the Spare checkbox you are working with is located. In this case, the checkbox is on the Assignment tab.

### Field format:

Information is stored in several types of fields in Volgistics. This section indicates that the Spare checkbox is a Checkbox field.

### Field name:

This is the first place on the Spare Checkbox Properties setup page where a system operator can make any adjustments to the field. The checkbox is called "Spare checkbox" by default. To change the name of the checkbox, delete the text from this field and enter the name you would like to change the checkbox to.

### Hidden:

No

"No" must be selected in order for system operators to see this checkbox and the information it contains on the Assignment tab of the Assignment record.

Yes

If you do not want system operators to be able to view this Spare checkbox on the Assignment tab of the Assignment record, you can select "Yes" from the drop down list. When a checkbox is hidden, System operators will not see the checkbox or whether or not it was marked before the field was made hidden, but if the checkbox was marked before it was hidden, it will still be marked if you later unhide the checkbox.

Default entry:

If you want this checkbox to be checked by default, you can check the box here.

**System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

Power users

*View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

*View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

Basic users

*View and change*



Select this option to permit system operators designated as Basic users to view and edit this field.

*View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

*Hidden*

---

## Duties Field Properties Setup Page

Help topic 2452

Added or revised 11-20-2008

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You can use the Duties field properties setup page to configure the Duties field on the Description tab in the Assignment record. To get to the Duties field setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Description tab and then choose Duties field.

### Field location:

This section indicates where the Duties field you are working with is located. In this case, the field is on the Description tab.

### Field format:

Information is stored in several types of fields in Volgistics. This section indicates that the Duties field is a text field.

### Field name:

This is the first place on the Duties field Properties setup page where a system operator can make any adjustments to the field. The field is called "Duties field" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

*No*

"No" must be selected in order for system operators to see this field and the information it contains on the Description tab of the Assignment record.

*Yes*

If you do not want system operators to be able to view this Duties field on the Description tab of the Assignment record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

### Require an entry:

*No*

If you select "No" it will be possible for this field on the Description tab to be left blank in Volgistics, as well as at VIC.

#### *At VIC*

This selection requires that users always enter information in this Duties field at VIC, but system operators working within Volgistics will not be forced to enter information in this field.

#### *Always*

If you select "Always" it will not be possible for this Duties field on the Description tab to be left blank in Volgistics, or at VIC.

#### Default entry:

If you want certain information to appear in this field by default, you can enter it here.

### **System operator rights**

This section determines which types of [system operators \[pg:1895\]](#) can view, or view and change, this field in Volgistics.

#### Volgistics Administrators

##### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

##### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

##### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

#### Power users

##### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

##### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

##### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

#### Basic users

##### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

##### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

##### *Hidden*

---

## Qualifications Field Properties Setup Page

Help topic 2453

Added or revised 11-20-2008

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You can use the Qualifications field properties setup page to configure the Qualifications field on the Description tab in the Assignment record. To get to the Qualifications field setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Description tab and then choose Qualifications field.

#### Field location:

This section indicates where the Qualifications field you are working with is located. In this case, the field is on the Description tab.

#### Field format:

Information is stored in several types of fields in Volgistics. This section indicates that the Qualifications field is a text field.

#### Field name:

This is the first place on the Qualifications field Properties setup page where a system operator can make any adjustments to the field. The field is called "Qualifications field" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

#### Hidden:

*No*

"No" must be selected in order for system operators to see this field and the information it contains on the Description tab of the Assignment record.

*Yes*

If you do not want system operators to be able to view this Qualifications field on the Description tab of the Assignment record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

Require an entry:

*No*

If you select "No" it will be possible for this field on the Description tab to be left blank in Volgistics, as well as at VIC.

*At VIC*

This selection requires that users always enter information in this Qualifications field at VIC, but system operators working within Volgistics will not be forced to enter information in this field.

*Always*

If you select "Always" it will not be possible for this Qualifications field on the Description tab to be left blank in Volgistics, or at VIC.

Default entry:

If you want certain information to appear in this field by default, you can enter it here.

**System operator rights**

This section determines which types of [system operators \[pg:1895\]](#) can view, or view and change, this field in Volgistics.

Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

Power users

*View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

*View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

### *Hidden*

---

## **Directions Field Properties Setup Page**

Help topic 2454

Added or revised 11-20-2008

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You can use the Directions field properties setup page to configure the Directions field on the Description tab in the Assignment record. To get to the Directions field setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Description tab and then choose Directions field.

### Field location:

This section indicates where the Directions field you are working with is located. In this case, the field is on the Description tab.

### Field format:

Information is stored in several types of fields in Volgistics. This section indicates that the Directions field is a text field.

### Field name:

This is the first place on the Directions field Properties setup page where a system operator can make any adjustments to the field. The field is called "Directions field" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

*No*

"No" must be selected in order for system operators to see this field and the information it contains on the Description tab of the Assignment record.

Yes

If you do not want system operators to be able to view this Directions field on the Description tab of the Assignment record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

Require an entry:

No

If you select "No" it will be possible for this field on the Description tab to be left blank in Volgistics, as well as at VIC.

*At VIC*

This selection requires that users always enter information in this Directions field at VIC, but system operators working within Volgistics will not be forced to enter information in this field.

*Always*

If you select "Always" it will not be possible for this Directions field on the Description tab to be left blank in Volgistics, or at VIC.

Default entry:

If you want certain information to appear in this field by default, you can enter it here.

### **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

Power users

*View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

#### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

---

## Availability Needed Field Properties Setup Page

Help topic 2455

Added or revised 11-20-2008

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You can use the Availability needed field setup page to configure the Availability needed field on the Profile tab in the Assignment record. To get to the Availability needed field setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Profile tab (for Assignments), and then choose the Availability needed field.

#### Field location:

This section indicates where the Availability needed field you are working with is located. In this case, the field is on the Profile tab (for Assignments).

#### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Availability needed field is a Dropdown field.

#### Field name:

This is the first place on the Availability needed Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Availability needed" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

*No*

"No" must be selected in order for system operators to see this field and the information it contains on the Service tab of the Assignment record.

*Yes*

If you do not want system operators to be able to view the Availability needed field on the Profile tab (for Assignments) in the Assignment record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

### Require an entry:

*No*

If you select "No" it will be possible for this field on the Assignment Profile tab to be left blank in Volgistics, as well as at VIC.

*Always*

If you select "Always" it will not be possible for the Availability needed field on the Profile tab (for Assignments) to be left blank in Volgistics, or at VIC.

### Default entry:

If you want a certain drop down item to appear in this field by default, you can select it here.

## **Drop down table items**

### *Add a new item:*

This is where a system operator enters the possible options for this drop down field. Each time you enter a new item and click the **Save** button, an additional "Add a new item:" field will be created so that you can continue to add drop down items for this field. If you no longer want to use a particular drop down item, click the **Delete** button next to the field containing that item.

## **System operator rights**

This section determines which types of [system operators \[pg:1895\]](#) can view, or view and change, this field in Volgistics.

### Volgistics Administrators

#### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*



Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

Power users

*View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

*View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

Basic users

*View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

*View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

*Hidden*

---

## **From Field Properties Setup Page**

Help topic 2456

Added or revised 11-20-2008

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You can use the From field properties setup page to configure the From field on the Profile tab in the Assignment record. To get to the From field properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Profile tab (for Assignments), and then choose From.

Field location:

This section indicates where the From field you are working with is located. In this case, the field is on the Assignment Profile tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the From field is a Date field.

### Field name:

This is the first place on the From Field Properties setup page where a system operator can make any adjustments to the field. The field is called "From" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

*No*

"No" must be selected in order for system operators to see this field and the information it contains on the Profile tab of the Assignment record.

*Yes*

If you do not want system operators to be able to view the From field on the Profile tab of the Assignment record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

### Require an entry:

*No*

If you select "No" it will be possible for the From field on the Profile tab to be left blank in Volgistics, as well as at VIC.

*At VIC*

This selection requires that users always enter a date in the From field at VIC, but system operators working within Volgistics will not be forced to enter information in this field.

*Always*

If you select "Always" it will not be possible for the From field on the Profile tab to be left blank in Volgistics, or at VIC.

### Default entry:

If you want like a from date to be entered in the From field on the Assignment tab in the Assignment record by default, indicate that date here.

## **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

## Volgistics Administrators

### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

## Power users

### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

## Basic users

### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

### *Hidden*

---

## To Field Properties Setup Page

Help topic 2457

Added or revised 11-20-2008

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You can use the To field properties setup page to configure the To field on the Profile tab in the Assignment record. To get to the To field properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Profile tab (for Assignments), and then choose To.

### Field location:

This section indicates where the To field you are working with is located. In this case, the field is on the Assignment Profile tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the To field is a Date field.

### Field name:

This is the first place on the To Field Properties setup page where a system operator can make any adjustments to the field. The field is called "To" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

*No*

"No" must be selected in order for system operators to see this field and the information it contains on the Profile tab of the Assignment record.

*Yes*

If you do not want system operators to be able to view the To field on the Profile tab of the Assignment record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

### Require an entry:

*No*

If you select "No" it will be possible for the To field on the Profile tab to be left blank in Volgistics, as well as at VIC.

*At VIC*

This selection requires that users always enter a date in the To field at VIC, but system operators working within Volgistics will not be forced to enter information in this field.

*Always*

If you select "Always" it will not be possible for the To field on the Profile tab to be left blank in Volgistics, or at VIC.

Default entry:

If you want like a To date to be entered in the To field on the Assignment tab in the Assignment record by default, indicate that date here.

### **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

#### Volgistics Administrators

##### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

##### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

##### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

#### Power users

##### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

##### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

##### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

#### Basic users

##### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

##### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

*Hidden*

---

## **"Volunteers Serve up to" Field Properties Setup Page**

Help topic 2458

Added or revised 11-2-2008

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You can use the "volunteers serve up to" Field Properties setup page to configure the "volunteers serve up to" field on the Profile tab in the Assignment record. To get to the Profile tab "volunteers serve up to" setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Profile tab, and then choose "volunteers serve up to."

### Field location:

This section indicates where the "volunteers serve up to" field you are working with is located. In this case, the field is on the Assignment Profile tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the "volunteers serve up to" field is a whole number field.

### Field name:

This is the first place on the "volunteers serve up to" Field Properties setup page where a system operator can make any adjustments to the field. The field is called "volunteers serve up to" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

*No*

"No" is the default option here. "No" must be selected in order for system operators to see this field and the information it contains on the Profile tab of the Assignment record.

*Yes*

If you do not want system operators to be able to view the "volunteers serve up to" field on the Profile tab of the Assignment record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

### Require an entry:

*No*

If you select "No" it will be possible for the "volunteers serve up to" field on the Profile tab to be left blank in Volgistics, as well as at VIC.

### *At VIC*

This selection requires that users always enter information in the "volunteers serve up to" field at VIC, but system operators working within Volgistics will not be forced to enter a number in this field.

### *Always*

If you select "Always" it will not be possible for the "volunteers serve up to" field on the Assignment Profile tab to be left blank in Volgistics, or at VIC.

### Default entry:

If you want a certain drop down item to appear in this field by default, you can select it here.

## **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

### Volgistics Administrators

#### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

#### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

### Power users

#### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

### Basic users

### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

### *Hidden*

---

## **Last Name Field Properties Setup Page**

Help topic 2460

Added or revised 11-20-2008

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You can use the Last name Field Properties setup page to configure the Last name field on the Coordinator tab in the coordinator record. To get to the Coordinator tab Last name Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Coordinator tab, and then choose Last name.

### Field location:

This section indicates where the Last name field you are working with is located. In this case, the field is on the Coordinator tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Last name field is a Text field.

### Field name:

This is the first place on the Last name Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Last name" by default; however, some organizations may want to use a different name for this field. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

*No*

"No" is the default option here. "No" must be selected in order for system operators to see this field and the information it contains on the Coordinator tab of the coordinator record.

*Yes*

If you do not want system operators to be able to view the Last name field on the Coordinator tab of the coordinator record, you can select "Yes" from the drop down list. When a field is hidden, system operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.



Require an entry:

*No*

If you select "No" it will be possible for the Last name field on the Coordinator tab to be left blank.

*Always*

If you select "Always" it will not be possible for the Last name field on the Coordinator tab to be left blank.

Default entry:

The Last name field often contains no default entry. If, however, you want certain text to initially appear in the Last name field on the Coordinator tab in all new coordinator records, enter it here.

**System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

Power users

*View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

*View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

Basic users

### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

### *Hidden*

---

## **First Name Field Properties Setup Page**

Help topic 2461

Added or revised 11-20-2008

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You can use the First name Field Properties setup page to configure the First name field on the Coordinator tab in the coordinator record. To get to the Coordinator tab First name Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Coordinator tab, and then choose First name.

### Field location:

This section indicates where the First name field you are working with is located. In this case, the field is on the Coordinator tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the First name field is a Text field.

### Field name:

This is the first place on the First name Field Properties setup page where a system operator can make any adjustments to the field. The field is called "First name" by default; however, some organizations may want to use a different name for this field. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

*No*

"No" is the default option here. "No" must be selected in order for system operators to see this field and the information it contains on the Coordinator tab of the coordinator record.

*Yes*

If you do not want system operators to be able to view the First name field on the Coordinator tab of the coordinator record, you can select "Yes" from the drop down list. When a field is hidden, system operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

Require an entry:

*No*

If you select "No" it will be possible for the First name field on the Coordinator tab to be left blank.

*Always*

If you select "Always" it will not be possible for the First name field on the Coordinator tab to be left blank.

Default entry:

The First name field often contains no default entry. If, however, you want certain text to initially appear in the First name field on the Coordinator tab in all new coordinator records, enter it here.

**System operator rights**

This section determines which types of [system operators \[pg:1895\]](#) can view, or view and change, this field in Volgistics.

Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

Power users

*View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

*View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

Basic users

### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

### *Hidden*

---

## **Middle Name Field Properties Setup Page**

Help topic 2462

Added or revised 11-20-2008

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You can use the Middle name Field Properties setup page to configure the Middle name field on the Coordinator tab in the coordinator record. To get to the Coordinator tab Middle name Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Coordinator tab, and then choose Middle name.

### Field location:

This section indicates where the Middle name field you are working with is located. In this case, the field is on the Coordinator tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Middle name field is a Text field.

### Field name:

This is the first place on the Middle name Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Middle name" by default; however, some organizations may want to use a different name for this field. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

#### *No*

"No" is the default option here. "No" must be selected in order for system operators to see this field and the information it contains on the Coordinator tab of the coordinator record.

#### *Yes*

If you do not want system operators to be able to view the Middle name field on the Coordinator tab of the coordinator record, you can select "Yes" from the drop down list. When a field is hidden, system operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

Require an entry:

*No*

If you select "No" it will be possible for the Middle name field on the Coordinator tab to be left blank.

*Always*

If you select "Always" it will not be possible for the Middle name field on the Coordinator tab to be left blank.

Default entry:

The Middle name field often contains no default entry. If, however, you want certain text to initially appear in the Middle name field on the Coordinator tab in all new coordinator records, enter it here.

**System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

Power users

*View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

*View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

Basic users

### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

### *Hidden*

---

## Nickname Field Properties Setup Page

Help topic 2463

Added or revised 11-20-2008

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You can use the Nickname Field Properties setup page to configure the Nickname field on the Coordinator tab in the coordinator record. To get to the Coordinator tab Nickname Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Coordinator tab, and then choose Nickname.

### Field location:

This section indicates where the Nickname field you are working with is located. In this case, the field is on the Coordinator tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Nickname field is a Text field.

### Field name:

This is the first place on the Nickname Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Nickname" by default; however, some organizations may want to use a different name for this field. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

#### *No*

"No" is the default option here. "No" must be selected in order for system operators to see this field and the information it contains on the Coordinator tab of the coordinator record.

#### *Yes*

If you do not want system operators to be able to view the Nickname field on the Coordinator tab of the coordinator record, you can select "Yes" from the drop down list. When a field is hidden, system operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

Require an entry:

*No*

If you select "No" it will be possible for the Nickname field on the Coordinator tab to be left blank.

*Always*

If you select "Always" it will not be possible for the Nickname field on the Coordinator tab to be left blank.

Default entry:

The Nickname field often contains no default entry. If, however, you want certain text to initially appear in the Nickname field on the Coordinator tab in all new coordinator records, enter it here.

**System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

Power users

*View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

*View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

Basic users

### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

### *Hidden*

---

## **Title Field Properties Setup Page**

Help topic 2364

Added or revised 11-11-2008

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You can use the Title Field Properties setup page to configure the Title field on the Coordinator tab in the coordinator record. To get to the Coordinator tab Title Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Coordinator tab, and then choose Title.

### Field location:

This section indicates where the Title field you are working with is located. In this case, the field is on the Coordinator tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Title field is a Dropdown field.

### Field name:

This is the first place on the Title Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Title" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

*No*

"No" must be selected in order for system operators to see this field and the information it contains on the Coordinator tab of the coordinator record.

*Yes*

If you do not want system operators to be able to view the Title field on the Coordinator tab of the coordinator record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.



### Require an entry:

*No*

If you select "No" it will be possible for the Title field on the Coordinator tab to be left blank.

*Always*

If you select "Always" it will not be possible for the Title field on the Coordinator tab to be left blank.

### Default entry:

If you want a certain drop down item to appear in this field by default, you can select it here.

### **Drop down table items**

*Add a new item:*

This is where a system operator enters the possible options for this drop down field. Examples of potential drop down items for the Title field include "Mr.," "Ms.," "Mrs.," "Dr.," etc. Each time you enter a new item and click the **Save** button, an additional "Add a new item:" field will be created so that you can continue to add drop down items for this field. If you no longer want to use a particular drop down item, click the **Delete** button next to the field containing that item. You can also merge one Title into another. After you merge two dropdown items together, any records that had the first entry will have the second entry you choose instead. The merged item will no longer appear as a choice in the Status field.

Note: Several minutes may pass before the merged values appear in your database.

### **System operator rights**

This section determines which types of [system operators \[pg:1895\]](#) can view, or view and change, this field in Volgistics.

#### Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

#### Power users

*View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

#### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

---

## Street Field Properties Setup Page

Help topic 2465

Added or revised 11-11-2008

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You can use the Street Field Properties setup page to configure the Street field on the Coordinator tab in the coordinator record. To get to the Coordinator tab Street Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Coordinator tab, and then choose Street.

#### Field location:

This section indicates where the Street field you are working with is located. In this case, the field is on the Coordinator tab.

#### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Street field is a Text field.

#### Field name:

This is the first place on the Street Field Properties setup page where a system operator can make any adjustments to the field. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

#### Hidden:

*No*

"No" is the default option here. "No" must be selected in order for system operators to see this field and the information it contains on the Coordinator tab of the coordinator record.

*Yes*

If you do not want system operators to be able to view the Street field on the Coordinator tab of the coordinator record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

Require an entry:

*No*

If you select "No" it will be possible for the Street field on the Coordinator tab to be left blank in Volgistics.

*Always*

If you select "Always" it will not be possible for the Street field on the Coordinator tab to be left blank in Volgistics.

Default entry:

If you want a certain option to appear in this Street field on the Coordinator tab in all new coordinator records, select it here.

### **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

Power users

*View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

#### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

---

## City Field Properties Setup Page

Help topic 2466

Added or revised 11-11-2008

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You can use the City Field Properties setup page to configure the City field on the Coordinator tab in the coordinator record. To get to the Coordinator tab City Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Coordinator tab, and then choose City.

#### Field location:

This section indicates where the City field you are working with is located. In this case, the field is on the Coordinator tab.

#### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the City field is a Text field.

#### Field name:

This is the first place on the City Field Properties setup page where a system operator can make any adjustments to the field. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

#### Hidden:

No

"No" is the default option here. "No" must be selected in order for system operators to see this field and the information it contains on the Coordinator tab of the coordinator record.

Yes

If you do not want system operators to be able to view the City field on the Coordinator tab of the coordinator record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

Require an entry:

No

If you select "No" it will be possible for the City field on the Coordinator tab to be left blank in Volgistics.

Always

If you select "Always" it will not be possible for the City field on the Coordinator tab to be left blank in Volgistics.

Default entry:

If you want a certain option to appear in this City field on the Coordinator tab in all new coordinator records, select it here. For example, if your organization's coordinators are all or mostly local people, you might choose to enter the local city name in this field. This way, when creating a new coordinator record you can pass by this field if it already contains the correct information for that individual.

### **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

#### Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

#### Power users

*View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

*View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

Basic users

*View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

*View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

*Hidden*

---

## State Field Properties Setup Page

Help topic 2467

Added or revised 11-11-2008

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You can use the State Field Properties setup page to configure the State field on the Coordinator tab in the coordinator record. To get to the Coordinator tab State Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Coordinator fields, and then choose State.

Field location:

This section indicates where the State field you are working with is located. In this case, the field is on the Coordinator tab.

Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the State field is a Dropdown field.

Field name:

This is the first place on the State Field Properties setup page where a system operator can make any adjustments to the field. The field is called "State" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

Hidden:

No

"No" must be selected in order for system operators to see this field and the information it contains on the Coordinator tab of the coordinator record.

Yes

If you do not want system operators to be able to view the State field on the Coordinator tab of the coordinator record, you can select "Yes" from the drop down list. When a field is hidden, system operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

Require an entry:

No

If you select "No" it will be possible for the State field on the Coordinator tab to be left blank in Volgistics.

Always

If you select "Always" it will not be possible for the State field on the Coordinator tab to be left blank in Volgistics.

Default entry:

If you want a certain drop down item to appear in this field by default, you can select it here. For example, if all or most of your organization's coordinators are from one state, you can choose it as the default so that you can pass by this field when creating a new coordinator record.

### **Drop down table items**

*Add a new item:*

This is where a system operator enters the possible options for this drop down field. Each time you enter a new item and click the **Save** button, an additional "Add a new item:" field will be created so that you can continue to add drop down items for this field. If you no longer want to use a particular drop down item, click the **Delete** button next to the field containing that item.

### **System operator rights**

This section determines which types of [system operators \[pg:1895\]](#) can view, or view and change, this field in Volgistics.

Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

### Power users

#### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

### *Hidden*

---

## **Zip Field Properties Setup Page**

Help topic 2468

Added or revised 11-11-2008

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You can use the Zip Field Properties setup page to configure the Zip field on the Coordinator tab in the coordinator record. To get to the Coordinator tab Zip Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Coordinator tab, and then choose Zip.

### Field location:

This section indicates where the Zip field you are working with is located. In this case, the field is on the Coordinator tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Zip field is a whole Zip field.



Field name:

This is the first place on the Zip Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Zip" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

Hidden:

*No*

"No" is the default option here. "No" must be selected in order for system operators to see this field and the information it contains on the Coordinator tab of the coordinator record.

*Yes*

If you do not want system operators to be able to view the Zip field on the Coordinator tab of the coordinator record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

Require an entry:

*No*

If you select "No" it will be possible for the Zip field on the Coordinator tab to be left blank in Volgistics.

*Always*

If you select "Always" it will not be possible for the Zip field on the Coordinator tab to be left blank in Volgistics.

Default entry:

If you want a certain drop down item to appear in this field by default, you can select it here.

**System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

#### Power users

##### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

##### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

##### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

#### Basic users

##### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

##### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

##### *Hidden*

---

## **Country Field Properties Setup Page**

Help topic 2469

Added or revised 09-26-2008

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You can use the Country Field Properties setup page to configure the Country field on the Coordinator tab in the coordinator record. To get to the Coordinator tab Country Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Coordinator tab, and then choose Country.

#### Field location:

This section indicates where the Country field you are working with is located. In this case, the field is on the Coordinator tab.

#### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Country field is a Dropdown field.

### Field name:

This is the first place on the Country Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Country" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

*No*

"No" must be selected in order for system operators to see this field and the information it contains on the Coordinator tab of the coordinator record.

*Yes*

If you do not want system operators to be able to view the Country field on the Coordinator tab of the coordinator record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

### Default entry:

If you want a certain drop down item to appear in this field by default, you can select it here. For example, if all or most of your organization's coordinators are from one Country, you can choose it as the default so that you can pass by this field when creating a new coordinator record.

### **Drop down table items**

#### *Add a new item:*

This is where a system operator enters the possible options for this drop down field. Each time you enter a new item and click the **Save** button, an additional "Add a new item:" field will be created so that you can continue to add drop down items for this field. If you no longer want to use a particular drop down item, click the **Delete** button next to the field containing that item.

### **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

#### Volgistics Administrators

##### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

##### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

##### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

## Power users

### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

## Basic users

### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

### *Hidden*

---

## **No Postal Mail Field Properties Setup Page**

Help topic 2470

Added or revised 11-11-2008

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You can use the No postal mail Field Properties setup page to configure the No postal mail field on the Coordinator tab in the coordinator record. To get to the Coordinator tab No postal mail Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Coordinator tab, and then choose No postal mail.

### Field location:

This section indicates where the No postal mail field is located. In this case, the field is on the Coordinator tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that this is a Checkbox field.

### Field name:

The field is called "No postal mail." This field name can be changed by deleting the field name and entering a new one.

Hidden:

*No*

"No" is the default option here. "No" must be selected in order for system operators to see this field and the information it contains on the Coordinator tab of the coordinator record.

*Yes*

If you do not want system operators to be able to view the No postal mail field on the Coordinator tab of the coordinator record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

Default entry:

You can decide if the No postal mail field on the Coordinator tab is initially marked or unmarked in all new coordinator records by making the desired selection here.

**System operator rights**

This section determines which types of [system operators \[pg:1895\]](#) can view, or view and change, this field in Volgistics.

Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

Power users

*View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

*View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

#### Basic users

##### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

##### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

##### *Hidden*

---

## No Email Field Properties Setup Page

Help topic 2471

Added or revised 11-11-2008

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You can use the No email Field Properties setup page to configure the No email field on the Coordinator tab in the coordinator record. To get to the Coordinator tab No email Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Coordinator tab, and then choose No email.

#### Field location:

This section indicates where the No email field is located. In this case, the field is on the Coordinator tab.

#### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that this is a Checkbox field.

#### Field name:

The field is called "No email." This field name can be changed by deleting the field name and entering a new one.

#### Hidden:

*No*

"No" is the default option here. "No" must be selected in order for system operators to see this field and the information it contains on the Coordinator tab of the coordinator record.

*Yes*

If you do not want system operators to be able to view the No email field on the Coordinator tab of the coordinator record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

### Default entry:

You can decide if the No email field on the Coordinator tab is initially marked or unmarked in all new coordinator records by making the desired selection here.

### **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

#### Volgistics Administrators

##### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

##### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

##### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

#### Power users

##### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

##### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

##### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

#### Basic users

##### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

##### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

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## Home Field Properties Setup Page

Help topic 2472

Added or revised 11-11-2008

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You can use the Home Field Properties setup page to configure the Home field on the Coordinator tab in the coordinator record. To get to the Coordinator tab Home Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Coordinator tab, and then choose Home.

### Field location:

This section indicates where the Home field you are working with is located. In this case, the field is on the Coordinator tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Home field is a phone number field.

There are six phone number format options. Select the way you would like to track Home phone numbers in your system from the drop down menu here.

### Field name:

This is the first place on the Home Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Home" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

No

"No" is the default option here. "No" must be selected in order for system operators to see this field and the information it contains on the Coordinator tab of the coordinator record.

Yes

If you do not want system operators to be able to view the Home field on the Coordinator tab of the coordinator record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

### Require an entry:

No

If you select "No" it will be possible for the Home phone number field on the Coordinator tab to be left blank in Volgistics, as well as at VIC.



### *At VIC*

This selection requires that users always enter a phone number in the Home field at VIC, but system operators working within Volgistics will not be forced to enter a number in this field.

### *Always*

If you select "Always" it will not be possible for the Home field on the Coordinator tab to be left blank in Volgistics, or at VIC.

### Default entry:

If you want a certain drop down item to appear in this field by default, you can select it here.

## **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

### Volgistics Administrators

#### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

#### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

### Power users

#### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

### Basic users

### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Basic users from both editing and viewing this field.

## **Related help**

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## **OK To Call Field Properties Setup Page**

Help topic 2473

Added or revised 11-11-2008

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You can use the OK to call Field Properties setup page to configure the OK to call field on the Coordinator tab in the coordinator record. To get to the Coordinator tab OK to call Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Coordinator tab, and then choose OK to call.

### Field location:

This section indicates where the OK to call field you are working with is located. In this case, the field is on the Coordinator tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that this is an OK to call field.

### Field name:

The field is called "OK to call." This field name cannot be changed.

### Hidden:

*No*

"No" is the default option here. "No" must be selected in order for system operators to see this field and the information it contains on the Coordinator tab of the coordinator record.

*Yes*

If you do not want system operators to be able to view the OK to call field on the Coordinator tab of the coordinator record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

Whether or not it is hidden can become very important for this particular field. Consider the following scenario: If an OK to call field is used and coordinators indicate that certain numbers are "OK to call" and others are not "OK to call," and then the field is hidden, Volgistics users will not know whether or not a coordinator should be contacted at a particular number stored in the system.

Default entry:

You can decide if the OK to call field on the Coordinator tab is initially marked or unmarked in all new coordinator records by making the desired selection here.

**System operator rights**

This section determines which types of [system operators \[pg:1895\]](#) can view, or view and change, this field in Volgistics.

Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

Power users

*View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

*View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

Basic users

*View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

*View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

*Hidden*

---

## Email Field Properties Setup Page

Help topic 2479

Added or revised 11-11-2008

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You can use the Email Field Properties setup page to configure the Email field on the Coordinator tab in the coordinator record. To get to the Coordinator tab Email Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Coordinator tab, and then choose Email.

### Field location:

This section indicates where the Email field you are working with is located. In this case, the field is on the Coordinator tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Email field is a Text field.

### Field name:

This is the first place on the Email Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Email" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

*No*

"No" is the default option here. "No" must be selected in order for system operators to see this field and the information it contains on the Coordinator tab of the coordinator record.

*Yes*

If you do not want system operators to be able to view the Email field on the Coordinator tab of the coordinator record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

### Require an entry:

*No*

If you select "No" it will be possible for the Email field on the Coordinator tab to be left blank in Volgistics.

*Always*

If you select "Always" it will not be possible for the Email field on the Coordinator tab to be left blank in Volgistics.

Default entry:

The Email field often contains no default entry. If, however, you want certain text to initially appear in the Email field on the Coordinator tab in all new coordinator records, enter it here.

### **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

Power users

*View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

*View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

Basic users

*View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

*View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

*Hidden*

---

## Web site Field Properties Setup Page

Help topic 2480

Added or revised 11-11-2008

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You can use the Web site Field Properties setup page to configure the Web site field on the Coordinator tab in the coordinator record. To get to the Coordinator tab Web site Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Coordinator tab, and then choose Web site.

### Field location:

This section indicates where the Web site field you are working with is located. In this case, the field is on the Coordinator tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Web site field is a Text field.

### Field name:

This is the first place on the Web site Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Web site" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

*No*

"No" is the default option here. "No" must be selected in order for system operators to see this field and the information it contains on the Coordinator tab of the coordinator record.

*Yes*

If you do not want system operators to be able to view the Web site field on the Coordinator tab of the coordinator record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

### Require an entry:

*No*

If you select "No" it will be possible for the Web site field on the Coordinator tab to be left blank in Volgistics.

*Always*

If you select "Always" it will not be possible for the Web site field on the Coordinator tab to be left blank in Volgistics.

Default entry:

The Web site field often contains no default entry. If, however, you want certain text to initially appear in the Web site field on the Coordinator tab in all new coordinator records, enter it here.

**System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

Power users

*View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

*View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

Basic users

*View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

*View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

*Hidden*

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## Position Field Properties Setup Page

Help topic 2481

Added or revised 11-21-2008

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You can use the Position field properties setup page to configure a Position field on the Coordinator tab in the coordinator record. To get to the Position field properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Coordinator fields, and then choose the Position field.

### Field location:

This section indicates where the Position field you are working with is located. In this case, the field is on the Coordinator tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Position field is a Dropdown field.

### Field name:

This is the first place on the Position Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Position" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

*No*

"No" must be selected in order for system operators to see this field and the information it contains on the Coordinator tab of the coordinator record.

*Yes*

If you do not want system operators to be able to view this Position field on the Coordinator tab of the coordinator record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

### Require an entry:

*No*

If you select "No" it will be possible for the Position field on the Coordinator tab to be left blank in Volgistics.  
*Always*



If you select "Always" it will not be possible for the Position field on the Coordinator tab to be left blank in Volgistics.

#### Default entry:

If you want a certain drop down item to appear in this field by default, you can select it here.

#### **Drop down table items**

##### *Add a new item:*

This is where a system operator enters the possible options for this drop down field. Each time you enter a new item and click the **Save** button, an additional "Add a new item:" field will be created so that you can continue to add drop down items for this field. If you no longer want to use a particular drop down item, click the **Delete** button next to the field containing that item.

#### **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

##### Volgistics Administrators

###### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

###### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

###### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

##### Power users

###### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

###### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

###### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

## Basic users

### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

### *Hidden*

---

## **Spare Lookup Field Properties Setup Page**

Help topic 2482

Added or revised 11-21-2008

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You can use the Spare lookup field properties setup page to configure a Spare lookup field on the Coordinator tab in the coordinator record. To get to the Spare lookup field properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Coordinator fields, and then choose the Spare lookup field.

### Field location:

This section indicates where the Spare lookup field you are working with is located. In this case, the field is on the Coordinator tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Spare lookup field is a Dropdown field.

### Field name:

This is the first place on the Spare lookup Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Spare lookup" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

*No*

"No" must be selected in order for system operators to see this field and the information it contains on the Coordinator tab of the coordinator record.

*Yes*

If you do not want system operators to be able to view this Spare lookup field on the Coordinator tab of the coordinator record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

### Require an entry:

*No*

If you select "No" it will be possible for the Spare lookup field on the Coordinator tab to be left blank in Volgistics.  
*Always*

If you select "Always" it will not be possible for the Spare lookup field on the Coordinator tab to be left blank in Volgistics.

### Default entry:

If you want a certain drop down item to appear in this field by default, you can select it here.

### **Drop down table items**

*Add a new item:*

This is where a system operator enters the possible options for this drop down field. Each time you enter a new item and click the **Save** button, an additional "Add a new item:" field will be created so that you can continue to add drop down items for this field. If you no longer want to use a particular drop down item, click the **Delete** button next to the field containing that item.

### **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

#### Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

#### Power users

*View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

*View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

Basic users

*View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

*View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

*Hidden*

---

## Spare Date Field Properties Setup Page

Help topic 2483

Added or revised 11-21-2008

---

You can use the Spare date field properties setup page to configure a Spare date field on the Coordinator tab in the coordinator record. To get to the Spare date field setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Coordinator tab, and then choose the Spare date field of interest.

Field location:

This section indicates where the Spare date field you are working with is located. In this case, the field is on the Coordinator tab.

Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Spare date field is a Date field.

Field name:

This is the first place on the Spare Field Properties setup page where a system operator can make any adjustments to the field. Use the Field name field to give your spare date field a name.

Hidden:

*No*

"No" must be selected in order for system operators to see this field and the information it contains on the Coordinator tab of the coordinator record.

Yes

If you do not want system operators to be able to view this Spare date field on the Coordinator tab of the coordinator record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

Require an entry:

No

If you select "No" it will be possible for this field on the Coordinator tab to be left blank in Volgistics, as well as at VIC.

Always

If you select "Always" it will not be possible for this Spare date field on the Coordinator tab to be left blank in Volgistics, or at VIC.

Default entry:

If you want a certain date to appear in this field by default, you can enter it here.

### **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

#### Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

#### Power users

*View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

*View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

Basic users

*View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

*View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

*Hidden*

---

## Job Title Field Properties Setup Page

Help topic 2484

Added or revised 11-11-2008

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You can use the Job title Field Properties setup page to configure the Job title field on the Coordinator tab in the coordinator record. To get to the Coordinator tab Job title Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Coordinator tab, and then choose Job title.

Field location:

This section indicates where the Job title field you are working with is located. In this case, the field is on the Coordinator tab.

Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Job title field is a Text field.

Field name:

This is the first place on the Job title Field Properties setup page where a system operator can make any adjustments to the field. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

Hidden:

*No*

"No" is the default option here. "No" must be selected in order for system operators to see this field and the information it contains on the Coordinator tab of the coordinator record.

Yes

If you do not want system operators to be able to view the Job title field on the Coordinator tab of the coordinator record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

Require an entry:

No

If you select "No" it will be possible for the Job title field on the Coordinator tab to be left blank in Volgistics.

Always

If you select "Always" it will not be possible for the Job title field on the Coordinator tab to be left blank in Volgistics.

Default entry:

If you want a certain option to appear in this Job title field on the Coordinator tab in all new coordinator records, select it here.

### **System operator rights**

This section determines which types of [system operators \[pg:1895\]](#) can view, or view and change, this field in Volgistics.

#### Volgistics Administrators

##### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

##### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

##### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

#### Power users

##### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

##### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

### *Hidden*

---

## **Relationship Field Properties Setup Page**

Help topic 2485

Added or revised 11-21-2008

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You can use the Relationship field properties setup page to configure a Relationship field on the Coordinator tab in the coordinator record. To get to the Relationship field properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Coordinator fields, and then choose the Relationship field.

### Field location:

This section indicates where the Relationship field you are working with is located. In this case, the field is on the Coordinator tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Relationship field is a Dropdown field.

### Field name:

This is the first place on the Relationship Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Relationship" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

*No*

"No" must be selected in order for system operators to see this field and the information it contains on the Coordinator tab of the coordinator record.



Yes

If you do not want system operators to be able to view this Relationship field on the Coordinator tab of the coordinator record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

Require an entry:

No

If you select "No" it will be possible for the Relationship field on the Coordinator tab to be left blank in Volgistics.  
*Always*

If you select "Always" it will not be possible for the Relationship field on the Coordinator tab to be left blank in Volgistics.

Default entry:

If you want a certain drop down item to appear in this field by default, you can select it here.

### **Drop down table items**

*Add a new item:*

This is where a system operator enters the possible options for this drop down field. Each time you enter a new item and click the **Save** button, an additional "Add a new item:" field will be created so that you can continue to add drop down items for this field. If you no longer want to use a particular drop down item, click the **Delete** button next to the field containing that item.

### **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

#### Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

#### Power users

### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

### Basic users

### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

### *Hidden*

---

## **Spare Checkbox Field Properties Setup Page**

Help topic 2486

Added or revised 11-12-2008

---

You can use the Spare checkbox Field properties setup page to configure a Spare checkbox on the Coordinator tab in the Coordinator record. To get to the Spare checkbox Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Coordinator tab, and then choose the Spare checkbox of interest.

### Field location:

This section indicates where the Spare checkbox you are working with is located. In this case, the checkbox is on the Coordinator tab.

### Field format:

Information is stored in several types of fields in Volgistics. This section indicates that the Spare checkbox is a Checkbox field.

### Field name:

This is the first place on the Spare Checkbox Properties setup page where a system operator can make any adjustments to the field. The checkbox is called "Spare checkbox" by default. To change the name of the checkbox, delete the text from this field and enter the name you would like to change the checkbox to.

Hidden:

*No*

"No" must be selected in order for system operators to see this checkbox and the information it contains on the Coordinator tab of the Coordinator record.

*Yes*

If you do not want system operators to be able to view this Spare checkbox on the Coordinator tab of the Coordinator record, you can select "Yes" from the drop down list. When a checkbox is hidden, System operators will not see the checkbox or whether or not it was marked before the field was made hidden, but if the checkbox was marked before it was hidden, it will still be marked if you later unhide the checkbox.

Default entry:

If you want this checkbox to be checked by default, you can check the box here.

**System operator rights**

This section determines which types of [system operators \[pg:1895\]](#) can view, or view and change, this field in Volgistics.

Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

Power users

*View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

*View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

#### Basic users

##### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

##### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

##### *Hidden*

---

## **Last Name Field Properties Setup Page**

Help topic 2505

Added or revised 12-12-2008

---

You can use the Last name Field Properties setup page to configure the Last name field on the Core tab in the volunteer record. To get to the Core tab Last name Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Core tab, and then choose Last name.

#### Field location:

This section indicates where the Last name field you are working with is located. In this case, the field is on the Core tab.

#### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Last name field is a Text field.

#### Field name:

This is the first place on the Last name Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Last name" by default; however, some organizations may want to use a different name for this field. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

#### Hidden:

No

"No" is the default option here. "No" must be selected in order for system operators to see this field and the information it contains on the Core tab of the volunteer record.

Yes

If you do not want system operators to be able to view the Last name field on the Core tab of the volunteer record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

Require an entry:

*No*

If you select "No" it will be possible for the Last name field on the Core tab to be left blank in Volgistics, as well as at VIC.

*At VIC*

If a volunteer has access to their personal information at VIC, they may either intentionally or inadvertently delete information stored in the Last name field. If you select the "At VIC" option, the system will not allow them to log out with a blank Last name field.

*Always*

If you select "Always" it will not be possible for the Last name field on the Core tab to be left blank in Volgistics, or at VIC.

Default entry:

The Last name field often contains no default entry. If, however, you want certain text to initially appear in the Last name field on the Core tab in all new volunteer records, enter it here.

**System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

Power users

*View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

#### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

---

## First Name Field Properties Setup Page

Help topic 2506

Added or revised 12-12-2008

---

You can use the First name Field Properties setup page to configure the First name field on the Core tab in the volunteer record. To get to the Core tab First name Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Core tab, and then choose First name.

#### Field location:

This section indicates where the First name field you are working with is located. In this case, the field is on the Core tab.

#### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the First name field is a Text field.

#### Field name:

This is the first place on the First name Field Properties setup page where a system operator can make any adjustments to the field. The field is called "First name" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

#### Hidden:

*No*

"No" is the default option here. "No" must be selected in order for system operators to see this field and the information it contains on the Core tab of the volunteer record.

*Yes*

If you do not want system operators to be able to view the First name field on the Core tab of the volunteer record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

Require an entry:

*No*

If you select "No" it will be possible for the First name field on the Core tab to be left blank in Volgistics, as well as at VIC.

*At VIC*

If a volunteer has access to their personal information at VIC, they may either intentionally or inadvertently delete information stored in the First name field. If you select the "At VIC" option, the system will not allow them to log out with a blank First name field.

*Always*

If you select "Always" it will not be possible for the First name field on the Core tab to be left blank in Volgistics, or at VIC.

Default entry:

The First name field often contains no default entry. If, however, you want certain text to initially appear in the First name field on the Core tab in all new volunteer records, enter it here.

### **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

#### Power users

##### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

##### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

##### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

#### Basic users

##### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

##### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

##### *Hidden*

---

## **Middle Name Field Properties Setup Page**

Help topic 2507

Added or revised 12-12-2008

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You can use the Middle name Field Properties setup page to configure the Middle name field on the Core tab in the volunteer record. To get to the Core tab Middle name Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Core tab, and then choose Middle name.

#### Field location:

This section indicates where the Middle name field you are working with is located. In this case, the field is on the Core tab.

#### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Middle name field is a Text field.



### Field name:

This is the Middle place on the Middle name Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Middle name" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

*No*

"No" is the default option here. "No" must be selected in order for system operators to see this field and the information it contains on the Core tab of the volunteer record.

*Yes*

If you do not want system operators to be able to view the Middle name field on the Core tab of the volunteer record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

### Require an entry:

*No*

If you select "No" it will be possible for the Middle name field on the Core tab to be left blank in Volgistics, as well as at VIC.

*At VIC*

If a volunteer has access to their personal information at VIC, they may either intentionally or inadvertently delete information stored in the Middle name field. If you select the "At VIC" option, the system will not allow them to log out with a blank Middle name field.

*Always*

If you select "Always" it will not be possible for the Middle name field on the Core tab to be left blank in Volgistics, or at VIC.

### Default entry:

The Middle name field often contains no default entry. If, however, you want certain text to initially appear in the Middle name field on the Core tab in all new volunteer records, enter it here.

## **System operator rights**

This section determines which types of [system operators \[pg:1895\]](#) can view, or view and change, this field in Volgistics.

### Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

### Power users

#### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

### *Hidden*

---

## **Nickname Field Properties Setup Page**

Help topic 2508

Added or revised 12-12-2008

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You can use the Nickname Field Properties setup page to configure the Nickname field on the Core tab in the volunteer record. To get to the Core tab Nickname Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Core tab, and then choose Nickname.

### Field location:

This section indicates where the Nickname field you are working with is located. In this case, the field is on the Core tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Nickname field is a Text field.

### Field name:

This is the first place on the Nickname Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Nickname" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

*No*

"No" must be selected in order for system operators to see this field and the information it contains on the Core tab of the volunteer record.

*Yes*

If you do not want system operators to be able to view the Nickname field on the Core tab of the volunteer record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

### Default entry:

The Nickname field often contains no default entry. If, however, you want a certain entry to appear in this field by default, you can type it here.

### **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

#### Volgistics Administrators

##### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

##### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

##### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

#### Power users

### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

---

## **Number Field Setup**

Help topic 2509

Added or revised 05-10-2016

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You can use the Number field setup number to configure the Number field on the [Core tab \[pg:1868\]](#) in the volunteer record. To get to the Number field setup page, choose [Setup \[pg:0887\]](#) from the [menu \[pg:0215\]](#), click on Field options, Core tab, and then choose Number.

### Field location:

This section indicates where the Number field you are working with is located. In this case, the field is on the Core tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that this is a Number field.

### Field name:

This is the first place on the Number Field Properties setup Number where a [System Operator \[pg:0065\]](#) can make any adjustments to the field. The field is called "Number" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

*No*

"No" must be selected in order for System Operators to see this field and the information it contains on the Core tab of the volunteer record.

*Yes*

If you do not want System Operators to be able to view the Number field on the Core tab of the volunteer record, you can select "Yes" from the dropdown list. When a field is hidden, System Operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

### Require an entry:

*No*

If you select "No" it will be possible for the Number field on the Core tab to be left blank in Volgistics, as well as at VIC.

*Always*

If you select "Always" it will not be possible for the Number field on the Core tab to be left blank in Volgistics, or at VIC.

## **Automatic PIN numbering**

*Random (recommended)*

With this option, Volgistics automatically assigns a volunteer number that is between 4 and 6 digits long. Numbers are assigned randomly, reducing the possibility that volunteers will have sequential volunteer numbers. This is the default and recommended selection for automatic numbering.

*Home phone*

When you choose this option Volgistics attempts to use the last 7 digits of a volunteer's home phone number as their volunteer number. If no home phone number has been entered for the volunteer, or if another volunteer already has this number, Volgistics assigns a random number that is between 4 and 6 digits long.

*Sequential*

Choose this option if you prefer that new volunteer numbers be assigned automatically in a sequential order. With this option selected, Volgistics will automatically assign the next highest unused volunteer number, starting with the lowest number already used. If no volunteer records have previously been added to an account, numbering will begin at 1000. To cause numbering to start with a number less than 1,000 enter the first volunteer record and manually assign that volunteer record the number you wish to start with (by entering the number in the Number field on the Core tab).

## **System Operator rights**

This section determines which types of **System Operators** [pg:0065] can view, or view and change, this field in Volgistics.

#### Volgistics Administrators

##### *View and change*

Select this option to permit System Operators designated as **Volgistics Administrators** [pg:0052] to view and edit this field.

##### *View*

Select this option to permit System Operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

##### *Hidden*

Select this option to prevent System Operators designated as Volgistics Administrators from both editing and viewing this field.

#### Power users

##### *View and change*

Select this option to permit System Operators designated as Power users to view and edit this field.

##### *View*

Select this option to permit System Operators designated as Power users to view this field, but to prevent them from making any changes to it.

##### *Hidden*

Select this option to prevent System Operators designated as Power users from both editing and viewing this field.

#### Basic users

##### *View and change*

Select this option to permit System Operators designated as Basic users to view and edit this field.

##### *View*

Select this option to permit System Operators designated as Basic users to view this field, but to prevent them from making any changes to it.

##### *Hidden*

---

## Status Field Properties Setup Page

Help topic 2510

Added or revised 10-27-2011

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You can use the Status Field Properties setup page to configure the Status field on the Core tab in the volunteer record. To get to the Core tab Status Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Core tab, and then choose Status.

### Field location:

This section indicates where the Status field you are working with is located. In this case, the field is on the Core tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Status field is a Dropdown field.

### Field name:

This is the first place on the Status Field Properties setup page where a System Operator can make any adjustments to the field. The field is called "Status" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

No

"No" must be selected in order for System Operators to see this field and the information it contains on the Core tab of the volunteer record.

Yes

If you do not want System Operators to be able to view the Status field on the Core tab of the volunteer record, you can select "Yes" from the drop down list. When a field is hidden, System Operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

### Require an entry:

Always

Every volunteer and group record is required to have a Status so it is not possible to select an option other than "Always."

### Default entry:

If you want a certain drop down item to appear in this field by default, you can select it here. For example, if all or most of your organization's volunteers are given one Status, such as "Active," you can choose it as the default so that you can pass by this field when creating a new volunteer record.

## Drop down table items

*Add a new item:*

This is where a System Operator enters the possible options for this drop down field. Each time you enter a new item and click the **Save** button, an additional "Add a new item:" field will be created so that you can continue to add drop down items for this field. If you no longer want to use a particular drop down item, click the **Merge** to merge it with another item.

Every volunteer record must have a volunteer status. For this reason, it is not possible to delete a status (deleting a status would potentially leave some volunteers without a status). If you have a status you no longer need, instead of deleting it, combine it with another status. This ensures that no volunteer records are left without any status in their record. For example, if you have a status called "Moved" that you want to remove from your system, combine it with a status such as "Inactive." Any volunteers who had the "Moved" status will be changed to the "Inactive" status, and "Moved" will be removed from the Status drop-down list.

## System Operator rights

This section determines which types of [System Operators \[pg:1895\]](#) can view, or view and change, this field in Volgistics.

### Volgistics Administrators

*View and change*

Select this option to permit System Operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit System Operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent System Operators designated as Volgistics Administrators from both editing and viewing this field.

### Power users

*View and change*

Select this option to permit System Operators designated as Power Users to view and edit this field.

*View*

Select this option to permit System Operators designated as Power Users to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent System Operators designated as Power Users from both editing and viewing this field.

### Basic users



### *View and change*

Select this option to permit System Operators designated as Basic Users to view and edit this field.

### *View*

Select this option to permit System Operators designated as Basic Users to view this field, but to prevent them from making any changes to it.

### *Hidden*

---

## Flags Field Properties Setup Page

Help topic 2511

Added or revised 09-17-2010

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You can use the Flags Field Properties setup page to configure the Flags field on the Core tab in the volunteer record. To get to the Core tab Flags Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Core tab, and then choose Flags.

### Field location:

This section indicates where the Flags field you are working with is located. In this case, the field is on the Core tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Flags field is a Dropdown field.

### Field name:

This is the first place on the Flags Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Flags" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

*No*

"No" must be selected in order for system operators to see this field and the information it contains on the Core tab of the volunteer record.

*Yes*

If you do not want system operators to be able to view the Flags field on the Core tab of the volunteer record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

## Drop down table items

This section displays the list of options currently defined for fields that use drop-down lists. The items you see listed here will be the only items that can be selected for this field.

*Add a new item:*

Use the *Add a new item* field to add additional options to this drop down field. Enter the new item and then click the **Save** button for each item you want to add. Each item you add to the drop-down list here will appear as choice for this field when the field's drop-down list is selected in Volgistics.

*Delete*

*Merge*

If you no longer want to use a particular drop down item you can delete it, or merge it into another item on the list.

To delete an item click the **Delete** button next to the field containing that item. When you delete an item from a drop-down list, the item you delete will be removed from any record where it is currently selected. For example, if you delete the item "XYZ" from the State or Province field, any record that has "XYZ" as an entry in that field will have a blank entry once you delete "XYZ."

In some cases it's better to "merge" drop-down list items than to delete them. [Help topic 2018 \[pg:0963\]](#) explains how to merge drop-down list items.

## System operator rights

This section determines which types of [system operators \[pg:1895\]](#) can view, or view and change, this field in Volgistics.

Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

Power users

*View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

*View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

Basic users

*View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

*View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

*Hidden*

---

## Type Field Properties Setup Page

Help topic 2512

Added or revised 12-12-2008

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You can use the Type Field Properties setup page to configure the Type field on the Core tab in the volunteer record. To get to the Core tab Type Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Core tab, and then choose Type.

Field location:

This section indicates where the Type field you are working with is located. In this case, the field is on the Core tab.

Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Type field is a Dropdown field.

Field name:

This is the first place on the Type Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Type" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

Hidden:

*No*

"No" must be selected in order for system operators to see this field and the information it contains on the Core tab of the volunteer record.

*Yes*

If you do not want system operators to be able to view the Type field on the Core tab of the volunteer record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

Require an entry:

*No*

If you select "No" it will be possible for the Type field on the Core tab to be left blank in Volgistics, as well as at VIC.

*Always*

If you select "Always" it will not be possible for the Type field on the Core tab to be left blank in Volgistics, or at VIC.

Default entry:

If you want a certain drop down item to appear in this field by default, you can select it here. For example, if all or most of your organization's volunteers are given one Type, such as "Active," you can choose it as the default so that you can pass by this field when creating a new volunteer record.

## **Drop down table items**

This section displays the list of options currently defined for fields that use drop-down lists. The items you see listed here will be the only items that can be selected for this field.

*Add a new item:*

Use the *Add a new item* field to add additional options to this drop down field. Enter the new item and then click the **Save** button for each item you want to add. Each item you add to the drop-down list here will appear as choice for this field when the field's drop-down list is selected in Volgistics.

*Delete*

*Merge*

If you no longer want to use a particular drop down item you can delete it, or merge it into another item on the list.

To delete an item click the **Delete** button next to the field containing that item. When you delete an item from a drop-down list, the item you delete will be removed from any record where it is currently selected. For example, if you delete the item "XYZ" from the State or Province field, any record that has "XYZ" as an entry in that field will have a blank entry once you delete "XYZ."

In some cases it's better to "merge" drop-down list items than to delete them. [Help topic 2018 \[pg:0963\]](#) explains how to merge drop-down list items.

## **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

### Volgistics Administrators

#### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

#### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

### Power users

#### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

---

## Street Field Properties Setup Page

Help topic 2513

Added or revised 11-11-2008

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You can use the Street Field Properties setup page to configure the Street field on the Core tab in the volunteer record. To get to the Core tab Street Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Core tab, and then choose Street.

### Field location:

This section indicates where the Street field you are working with is located. In this case, the field is on the Core tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Street field is a Text field.

### Field name:

This is the first place on the Street Field Properties setup page where a system operator can make any adjustments to the field. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

*No*

"No" is the default option here. "No" must be selected in order for system operators to see this field and the information it contains on the Core tab of the volunteer record.

*Yes*

If you do not want system operators to be able to view the Street field on the Core tab of the volunteer record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

### Require an entry:

*No*

If you select "No" it will be possible for the Street field on the Core tab to be left blank in Volgistics, as well as at VIC.

*At VIC*

This selection requires that users always enter information in this Street field at VIC, but system operators working within Volgistics will not be forced to enter information in this field.

*Always*

If you select "Always" it will not be possible for the Street field on the Core tab to be left blank in Volgistics, or at VIC.

Default entry:

If you want a certain option to appear in this Street field on the Core tab in all new volunteer records, select it here.

**System operator rights**

This section determines which types of [system operators \[pg:1895\]](#) can view, or view and change, this field in Volgistics.

Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

Power users

*View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

*View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

Basic users

*View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

*View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

*Hidden*

---

## City Field Properties Setup Page

Help topic 2514

Added or revised 12-12-2008

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You can use the City Field Properties setup page to configure the City field on the Core tab in the volunteer record. To get to the Core tab City Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Core tab, and then choose City.

### Field location:

This section indicates where the City field you are working with is located. In this case, the field is on the Core tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the City field is a Text field.

### Field name:

This is the first place on the City Field Properties setup page where a system operator can make any adjustments to the field. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

*No*

"No" is the default option here. "No" must be selected in order for system operators to see this field and the information it contains on the Core tab of the volunteer record.

*Yes*

If you do not want system operators to be able to view the City field on the Core tab of the volunteer record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

### Require an entry:

*No*

If you select "No" it will be possible for the City field on the Core tab to be left blank in Volgistics, as well as at VIC.



### *At VIC*

This selection requires that users always enter information in this City field at VIC, but system operators working within Volgistics will not be forced to enter information in this field.

### *Always*

If you select "Always" it will not be possible for the City field on the Core tab to be left blank in Volgistics, or at VIC.

### Default entry:

If you want a certain option to appear in this City field on the Core tab in all new volunteer records, select it here. For example, if your organization's volunteers are all or mostly local people, you might choose to enter the local city name in this field. This way, when creating a new volunteer record you can pass by this field if it already contains the correct information for that individual.

### **System operator rights**

This section determines which types of [system operators \[pg:1895\]](#) can view, or view and change, this field in Volgistics.

#### Volgistics Administrators

##### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

##### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

##### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

#### Power users

##### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

##### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

##### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

## Basic users

### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

### *Hidden*

---

## State Field Properties Setup Page

Help topic 2515

Added or revised 12-12-2008

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You can use the State Field Properties setup page to configure the State field on the Core tab in the volunteer record. To get to the Core tab State Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Core tab, and then choose State.

### Field location:

This section indicates where the State field you are working with is located. In this case, the field is on the Core tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the State field is a Dropdown field.

### Field name:

This is the first place on the State Field Properties setup page where a system operator can make any adjustments to the field. The field is called "State" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

*No*

"No" must be selected in order for system operators to see this field and the information it contains on the Core tab of the volunteer record.

*Yes*

If you do not want system operators to be able to view the State field on the Core tab of the volunteer record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

### Require an entry:

*No*

If you select "No" it will be possible for the State field on the Core tab to be left blank in Volgistics, as well as at VIC.

*At VIC*

This selection requires that users always enter information in this State field at VIC, but system operators working within Volgistics will not be forced to enter information in this field.

*Always*

If you select "Always" it will not be possible for the State field on the Core tab to be left blank in Volgistics, or at VIC.

### Default entry:

If you want a certain drop down item to appear in this field by default, you can select it here. For example, if all or most of your organization's volunteers are from one state, you can choose it as the default so that you can pass by this field when creating a new volunteer record.

### **Drop down table items**

This section displays the list of options currently defined for fields that use drop-down lists. The items you see listed here will be the only items that can be selected for this field.

*Add a new item:*

Use the *Add a new item* field to add additional options to this drop down field. Enter the new item and then click the **Save** button for each item you want to add. Each item you add to the drop-down list here will appear as choice for this field when the field's drop-down list is selected in Volgistics.

*Delete*

*Merge*

If you no longer want to use a particular drop down item you can delete it, or merge it into another item on the list.

To delete an item click the **Delete** button next to the field containing that item. When you delete an item from a drop-down list, the item you delete will be removed from any record where it is currently selected. For example, if you delete the item "XYZ" from the State or Province field, any record that has "XYZ" as an entry in that field will have a blank entry once you delete "XYZ."

In some cases it's better to "merge" drop-down list items than to delete them. [Help topic 2018 \[pg:0963\]](#) explains how to merge drop-down list items.

*Add all U.S. States*

*Add all Canadian Provinces*

State or Province fields include *Add all U.S. States* and *Add all Canadian Provinces* buttons.

When you first start your Volgistics account your own State or Province abbreviation is automatically added to the State/Province field drop-down list, however you can always add any other State or Provinces that you'd like to appear in this drop-down list using the "Add a new item" field.

If you want to add all of the U.S. State or all of the Canadian Province abbreviations, just click the *Add all U.S. States* or *Add all Canadian Provinces* button.

## **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

### Volgistics Administrators

#### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

#### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

### Power users

#### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

*Hidden*

---

## Zip Field Properties Setup Page

Help topic 2516

Added or revised 12-12-2008

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You can use the Zip Field Properties setup page to configure the Zip field on the Core tab in the volunteer record. To get to the Core tab Zip Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Core tab, and then choose Zip.

### Field location:

This section indicates where the Zip field you are working with is located. In this case, the field is on the Core tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Zip field is a whole Zip field.

### Field name:

This is the first place on the Zip Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Zip" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

*No*

"No" is the default option here. "No" must be selected in order for system operators to see this field and the information it contains on the Core tab of the volunteer record.

*Yes*

If you do not want system operators to be able to view the Zip field on the Core tab of the volunteer record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

### Require an entry:

*No*

If you select "No" it will be possible for the Zip field on the Core tab to be left blank in Volgistics, as well as at VIC.

*At VIC*

This selection requires that users always enter information in the Zip field at VIC, but system operators working within Volgistics will not be forced to enter information in this field.

### *Always*

If you select "Always" it will not be possible for the Zip field on the Core tab to be left blank in Volgistics, or at VIC.

### Default entry:

If you want a certain drop down item to appear in this field by default, you can select it here.

## **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

### Volgistics Administrators

#### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

#### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

### Power users

#### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

*View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

*Hidden*

---

## Country Field Properties Setup Page

Help topic 2517

Added or revised 09-17-2010

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You can use the Country Field Properties setup page to configure the Country field on the Core tab in the volunteer record. To get to the Core tab Country Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Core tab, and then choose Country.

Field location:

This section indicates where the Country field you are working with is located. In this case, the field is on the Core tab.

Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Country field is a Dropdown field.

Field name:

This is the first place on the Country Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Country" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

Hidden:

*No*

"No" must be selected in order for system operators to see this field and the information it contains on the Core tab of the volunteer record.

*Yes*

If you do not want system operators to be able to view the Country field on the Core tab of the volunteer record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

Default entry:

If you want a certain drop down item to appear in this field by default, you can select it here. For example, if all or most of your organization's volunteers are from one Country, you can choose it as the default so that you can pass by this field when creating a new volunteer record.

## Drop down table items

This section displays the list of options currently defined for fields that use drop-down lists. The items you see listed here will be the only items that can be selected for this field.

*Add a new item:*

Use the *Add a new item* field to add additional options to this drop down field. Enter the new item and then click the **Save** button for each item you want to add. Each item you add to the drop-down list here will appear as choice for this field when the field's drop-down list is selected in Volgistics.

*Delete*

*Merge*

If you no longer want to use a particular drop down item you can delete it, or merge it into another item on the list.

To delete an item click the **Delete** button next to the field containing that item. When you delete an item from a drop-down list, the item you delete will be removed from any record where it is currently selected. For example, if you delete the item "XYZ" from the State or Province field, any record that has "XYZ" as an entry in that field will have a blank entry once you delete "XYZ."

In some cases it's better to "merge" drop-down list items than to delete them. [Help topic 2018 \[pg:0963\]](#) explains how to merge drop-down list items.

## System operator rights

This section determines which types of [system operators \[pg:1895\]](#) can view, or view and change, this field in Volgistics.

### Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

### Power users

*View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

*View*



Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

Basic users

*View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

*View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

*Hidden*

---

## No postal mail Field Properties Setup Page

Help topic 2518

Added or revised 12-12-2008

---

You can use the No postal mail Field Properties setup page to configure the No postal mail field on the Core tab in the volunteer record. To get to the Core tab No postal mail Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Core tab, and then choose No postal mail.

Field location:

This section indicates where the No postal mail field you are working with is located. In this case, the field is on the Core tab.

Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that this is an No postal mail field.

Field name:

The field is called "No postal mail." This field name cannot be changed.

Hidden:

*No*

"No" is the default option here. "No" must be selected in order for system operators to see this field and the information it contains on the Core tab of the volunteer record.

Yes

If you do not want system operators to be able to view the No postal mail field on the Core tab of the volunteer record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

Whether or not it is hidden can become very important for this particular field. Consider the following scenario: If an No postal mail field is used and volunteers indicate that certain numbers are "No postal mail" and others are not "No postal mail," and then the field is hidden, Volgistics users will not know whether or not a volunteer should be contacted at a particular number stored in the system.

Default entry:

You can decide if the No postal mail field on the Core tab is initially marked or unmarked in all new volunteer records by making the desired selection here.

**System operator rights**

This section determines which types of [system operators \[pg:1895\]](#) can view, or view and change, this field in Volgistics.

Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

Power users

*View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

*View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

## Basic users

### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

### *Hidden*

---

## **No email Field Properties Setup Page**

Help topic 2519

Added or revised 12-12-2008

---

You can use the No email Field Properties setup page to configure the No email field on the Core tab in the volunteer record. To get to the Core tab No email Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Core tab, and then choose No email.

### Field location:

This section indicates where the No email field you are working with is located. In this case, the field is on the Core tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that this is an No email field.

### Field name:

The field is called "No email." This field name cannot be changed.

### Hidden:

*No*

"No" is the default option here. "No" must be selected in order for system operators to see this field and the information it contains on the Core tab of the volunteer record.

*Yes*

If you do not want system operators to be able to view the No email field on the Core tab of the volunteer record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

Whether or not it is hidden can become very important for this particular field. Consider the following scenario: If an No email field is used and volunteers indicate that certain numbers are "No email" and others are not "No email," and then the field is hidden, Volgistics users will not know whether or not a volunteer should be contacted at a particular number stored in the system.

### Default entry:

You can decide if the No email field on the Core tab is initially marked or unmarked in all new volunteer records by making the desired selection here.

### **System operator rights**

This section determines which types of [system operators \[pg:1895\]](#) can view, or view and change, this field in Volgistics.

#### Volgistics Administrators

##### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

##### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

##### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

#### Power users

##### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

##### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

##### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

#### Basic users

##### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

##### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

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## Home Field Properties Setup Page

Help topic 2520

Added or revised 12-12-2008

---

You can use the Home Field Properties setup page to configure the Home field on the Core tab in the volunteer record. To get to the Core tab Home Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Core tab, and then choose Home.

### Field location:

This section indicates where the Home field you are working with is located. In this case, the field is on the Core tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Home field is a phone number field.

There are six phone number format options. Select the way you would like to track Home phone numbers in your system from the drop down menu here.

### Field name:

This is the first place on the Home Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Home" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

No

"No" is the default option here. "No" must be selected in order for system operators to see this field and the information it contains on the Core tab of the volunteer record.

Yes

If you do not want system operators to be able to view the Home field on the Core tab of the volunteer record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

### Require an entry:

No

If you select "No" it will be possible for the Home phone number field on the Core tab to be left blank in Volgistics, as well as at VIC.

### *At VIC*

This selection requires that users always enter a phone number in the Home field at VIC, but system operators working within Volgistics will not be forced to enter a number in this field.

### *Always*

If you select "Always" it will not be possible for the Home field on the Core tab to be left blank in Volgistics, or at VIC.

### Default entry:

If you want a certain drop down item to appear in this field by default, you can select it here.

## **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

### Volgistics Administrators

#### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

#### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

### Power users

#### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

### Basic users

### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Basic users from both editing and viewing this field.

### **Related help**

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## **OK To Call Field Properties Setup Page**

Help topic 2521

Added or revised 11-11-2008

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You can use the OK to call Field Properties setup page to configure the OK to call field on the Core tab in the volunteer record. To get to the Core tab OK to call Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Core tab, and then choose OK to call.

### Field location:

This section indicates where the OK to call field you are working with is located. In this case, the field is on the Core tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that this is an OK to call field.

### Field name:

The field is called "OK to call." This field name cannot be changed.

### Hidden:

*No*

"No" is the default option here. "No" must be selected in order for system operators to see this field and the information it contains on the Core tab of the volunteer record.

*Yes*

If you do not want system operators to be able to view the OK to call field on the Core tab of the volunteer record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

Whether or not it is hidden can become very important for this particular field. Consider the following scenario: If an OK to call field is used and volunteers indicate that certain numbers are "OK to call" and others are not "OK to call," and then the field is hidden, Volgistics users will not know whether or not a volunteer should be contacted at a particular number stored in the system.

### Default entry:

You can decide if the OK to call field on the Core tab is initially marked or unmarked in all new volunteer records by making the desired selection here.

### **System operator rights**

This section determines which types of [system operators \[pg:1895\]](#) can view, or view and change, this field in Volgistics.

#### Volgistics Administrators

##### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

##### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

##### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

#### Power users

##### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

##### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

##### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

#### Basic users

##### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

##### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.



---

## Email Field Properties Setup Page

Help topic 2527

Added or revised 12-12-2008

---

You can use the Email Field Properties setup page to configure the Email field on the Core tab in the volunteer record. To get to the Core tab Email Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Core tab, and then choose Email.

### Field location:

This section indicates where the Email field you are working with is located. In this case, the field is on the Core tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Email field is a Text field.

### Field name:

This is the first place on the Email Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Email" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

No

"No" is the default option here. "No" must be selected in order for system operators to see this field and the information it contains on the Core tab of the volunteer record.

Yes

If you do not want system operators to be able to view the Email field on the Core tab of the volunteer record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

### Require an entry:

No

If you select "No" it will be possible for the Email field on the Core tab to be left blank in Volgistics, as well as at VIC.

*At VIC*

If a volunteer has access to their personal information at VIC, they may either intentionally or inadvertently delete information stored in the Email field. If you select the "At VIC" option, the system will not allow them to log out with a blank Email field.

## *Always*

If you select "Always" it will not be possible for the Email field on the Core tab to be left blank in Volgistics, or at VIC.

### Default entry:

The Email field often contains no default entry. If, however, you want certain text to initially appear in the Email field on the Core tab in all new volunteer records, enter it here.

## **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

### Volgistics Administrators

#### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

#### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

### Power users

#### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

## *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

## *Hidden*

---

# Web site Field Properties Setup Page

Help topic 2528

Added or revised 07-06-2009

---

You can use the Web site Field Properties setup page to configure the Web site field on the Core tab in the volunteer record. To get to the Core tab Web site Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Core tab, and then choose Web site.

For volunteers who have a personal web page, or profiles on web sites such as a Facebook or Twitter, you can optionally use this field to record a link to the volunteer's page.

### Field location:

This section indicates where the Web site field you are working with is located. In this case, the field is on the Core tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Web site field is a Text field.

### Field name:

This is the first place on the Web site Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Web site" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

*No*

"No" is the default option here. "No" must be selected in order for system operators to see this field and the information it contains on the Core tab of the volunteer record.

*Yes*

If you do not want system operators to be able to view the Web site field on the Core tab of the volunteer record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

### Require an entry:

*No*

If you select "No" it will be possible for the Web site field on the Core tab to be left blank in Volgistics, as well as at VIC.

*At VIC*

If a volunteer has access to their personal information at VIC, they may either intentionally or inadvertently delete information stored in the Web site field. If you select the "At VIC" option, the system will not allow them to log out with a blank Web site field.

*Always*

If you select "Always" it will not be possible for the Web site field on the Core tab to be left blank in Volgistics, or at VIC.

Default entry:

The Web site field often contains no default entry. If, however, you want certain text to initially appear in the Web site field on the Core tab in all new volunteer records, enter it here.

Display as a link:

When a valid web page address has been saved in this field, a "Visit" link to that web page will appear next to the field if this checkbox is checked. When you use this field to collect and track volunteer web pages (such as Facebook and Twitter pages), this link will take you to their page.

### **System operator rights**

This section determines which types of **system operators** [pg:1895] can view, or view and change, this field in Volgistics.

Volgistics Administrators

*View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

*View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

*Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

Power users

*View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

### *Hidden*

---

## **Title Field Properties Setup Page**

Help topic 2529

Added or revised 09-17-2010

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You can use the Title Field Properties setup page to configure the Title field on the Core tab in the volunteer record. To get to the Core tab Title Field Properties setup page, choose Setup from the [menu \[pg:0215\]](#), click on Field options, Core tab, and then choose Title.

### Field location:

This section indicates where the Title field you are working with is located. In this case, the field is on the Core tab.

### Type of field:

Information is stored in several types of fields in Volgistics. This section indicates that the Title field is a Dropdown field.

### Field name:

This is the first place on the Title Field Properties setup page where a system operator can make any adjustments to the field. The field is called "Title" by default. To change the name of the field, delete the text from this field and enter the name you would like to change the field to.

### Hidden:

*No*

"No" must be selected in order for system operators to see this field and the information it contains on the Core tab of the volunteer record.

*Yes*

If you do not want system operators to be able to view the Title field on the Core tab of the volunteer record, you can select "Yes" from the drop down list. When a field is hidden, System operators will not see the field or any information that may have been entered in it before the field was made hidden, but any information that may have been in the field before it was hidden will still be there if you later unhide the field.

Require an entry:

*No*

If you select "No" it will be possible for the Title field on the Core tab to be left blank in Volgistics, as well as at VIC.

*At VIC*

This selection requires that users always enter information in this Title field at VIC, but system operators working within Volgistics will not be forced to enter information in this field.

*Always*

If you select "Always" it will not be possible for the Title field on the Core tab to be left blank in Volgistics, or at VIC.

Default entry:

If you want a certain drop down item to appear in this field by default, you can select it here.

### **Drop down table items**

This section displays the list of options currently defined for fields that use drop-down lists. The items you see listed here will be the only items that can be selected for this field.

*Add a new item:*

Use the *Add a new item* field to add additional options to this drop down field. Enter the new item and then click the **Save** button for each item you want to add. Each item you add to the drop-down list here will appear as choice for this field when the field's drop-down list is selected in Volgistics.

*Delete*

*Merge*

If you no longer want to use a particular drop down item you can delete it, or merge it into another item on the list.

To delete an item click the **Delete** button next to the field containing that item. When you delete an item from a drop-down list, the item you delete will be removed from any record where it is currently selected. For example, if you delete the item "XYZ" from the State or Province field, any record that has "XYZ" as an entry in that field will have a blank entry once you delete "XYZ."

In some cases it's better to "merge" drop-down list items than to delete them. [Help topic 2018 \[pg:0963\]](#) explains how to merge drop-down list items.

## **System operator rights**

This section determines which types of [system operators \[pg:1895\]](#) can view, or view and change, this field in Volgistics.

### Volgistics Administrators

#### *View and change*

Select this option to permit system operators designated as Volgistics Administrators to view and edit this field.

#### *View*

Select this option to permit system operators designated as Volgistics Administrators to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Volgistics Administrators from both editing and viewing this field.

### Power users

#### *View and change*

Select this option to permit system operators designated as Power users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Power users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

Select this option to prevent system operators designated as Power users from both editing and viewing this field.

### Basic users

#### *View and change*

Select this option to permit system operators designated as Basic users to view and edit this field.

#### *View*

Select this option to permit system operators designated as Basic users to view this field, but to prevent them from making any changes to it.

#### *Hidden*

---

## Documents Tab Rights Setup Page

Help topic 2553

Added or revised 04-04-2017

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The Documents Tab Rights Setup Page is used to set the [System Operator \[pg:0065\]](#) rights for the Docs tab on volunteer, Coordinator, Site, Place and Assignment records.

If you are not already on the Documents Tab Rights Setup page, you can get to the page by:

1. Select [Setup \[pg:0887\]](#) from the menu.
2. Expand the *Field options* link.
3. Select *Document tab rights*.

### User Levels

You control tab rights based on the operator's *user level*. There are three *user levels* in Volgistics:

- Volgistics Administrators
- Power Users
- Basic Users

Every Volgistics System Operator has one of these three *user levels*. You can determine or change a System Operator's user level by:

1. Select [Setup \[pg:0887\]](#) from the menu.
2. Expand the *System Operators* link.
3. Select an operator's name.
4. View or change the *User level* dropdown. See [help topic 1011 \[pg:1895\]](#) if you need more assistance.
5. Click the **Save** button if a change was made in step 4.

### Tab Rights

To set tab rights, select a sub-tab for the type of record where you want to set the tab rights. For example, to set the tab rights for the Docs tab on volunteer records, be sure the *Volunteer* sub-tab is selected.

**Document Tab Rights**

**Volunteer**

Volgistics Administrators:

Power Users:

Basic Users:

[Help](#)



**Please Note:** The *Coordinator, Site, Place and Assignment* sub-tabs will only appear if you have the [VicDocs \[pg:1648\]](#) module included in your account's [service level \[pg:0719\]](#). If VicDocs is not included, you will only see the Volunteer sub-tab.

Use the dropdown list to determine the rights for the operators at each user level. The dropdown will contain different options depending on if the [VicDocs \[pg:1648\]](#) module is included in your account's [service level \[pg:0719\]](#). Here are the rights associated with each dropdown list selection:

View, upload and delete (VicDocs included)

Select this option if you want operators with the user level to access the Docs tab to upload new documents, open and download documents, edit document names, and delete documents.

View and delete (VicDocs not included)

Select this option if you want operators with the user level to access the Docs tab to open and download documents, edit document names, and delete documents.

View and upload (VicDocs included)

Select this option if you want operators with the user level to access the Docs tab to upload new documents, open and download documents, and edit document names.

View only

Select this option if you want operators with this user level to access the Docs tab to open and download documents.

Hidden

Select this option if you want to prevent operators with this user level from accessing the Docs tab.

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## Message Types

Help topic 1023

Added or revised 07-24-2014

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Volgistics provides [message preference \[pg:0381\]](#) features needed to ensure the integrity of automatic and mass email and text messages. These features enable volunteers and [Coordinators \[pg:0163\]](#) to opt-in or opt-out of different types of automatic or mass messages your organization might routinely send. For example, an individual volunteer might like to receive *newsletter* messages, but not *fundraising request* messages.

We require opt-in and opt-out options to be used with all messages sent to more than one volunteer or Coordinator. Otherwise, Internet Service Providers (ISP's) and cell phone providers could mistakenly identify Volgistics as a spammer and prevent all messages from being delivered. [Help topic 2101 \[pg:0384\]](#) explains more.

If you're not already on the Message Types page, you can get there by selecting [Setup \[pg:0887\]](#) from the [menu \[pg:0215\]](#), choosing *Messages*, and then clicking *Message types*.

### Types of mass messages

Use the *Types of mass messages* section to define the different kinds or "types" of mass messages your organization might periodically send to volunteers and Coordinators. These become the choices volunteers and Coordinators see when they select the types of messages they would like to receive. Then, each time you send a mass message, you choose which of these types of message you're sending. Volgistics will only deliver the message to those who have opted to receive that type of message.

#### Type

Use the *Type* field to define up to ten different kinds of messages your organization may periodically send.

Type:

Default  (for new volunteers and coordinators)

Default  (as shown when opting in to text messaging in VicNet)

Reset  to

Type:

The type listed in the top spot on the page will appear as the default option in the dropdown for selecting types when an email message is sent. So if most of your messages will be a particular type, we recommend listing this in the top spot on the page.

These are some examples of different types of mass messages often sent by volunteer programs:

- Electronic newsletters
- Recruitment appeals
- Opportunity announcements

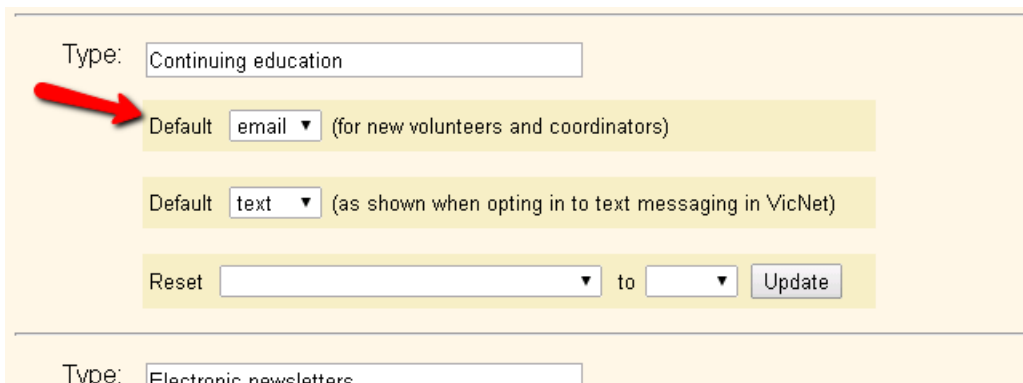
Training announcements  
Fund raising appeals  
News related to our mission  
Information request  
Volunteer news

### Important!

After you setup your message types, you should add descriptions about what information is sent with the type so volunteers and Coordinators have a better idea how they would like to receive this type of message. [Help topic 1068 \[pg:1327\]](#) shows how to do this for volunteers. [Help topic 1025 \[pg:1325\]](#) shows how to do this for Coordinators.

#### Default (for new volunteers and coordinators)

You can select to have a type show as selected, or not selected, by default.



Type: Continuing education

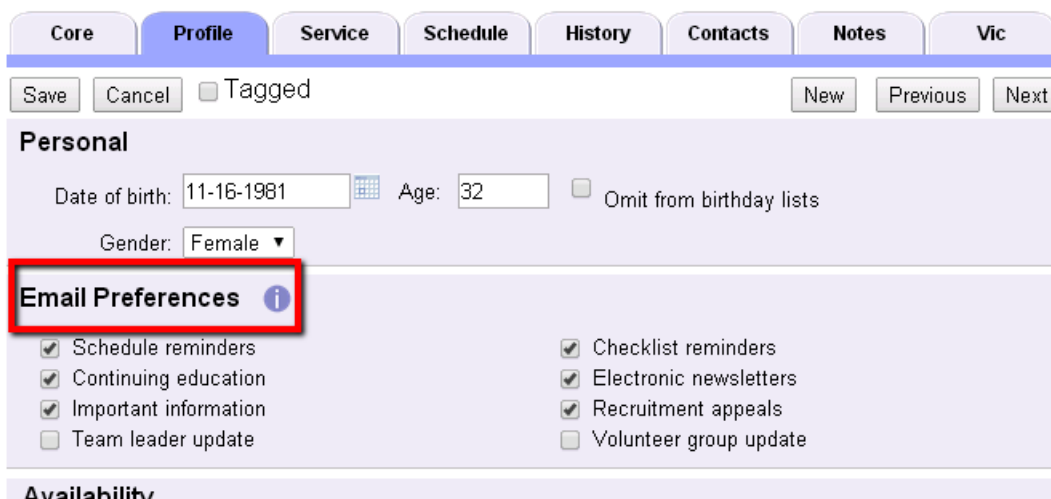
Default email (for new volunteers and coordinators)

Default text (as shown when opting in to text messaging in VicNet)

Reset [ ] to [ ] Update

Type: Electronic newsletters

This will control if the type appears as checked or un-checked for the Email Preference field for new volunteer records. The Email Preference field can be shown on the Profile tab of the volunteer records:



Core Profile Service Schedule History Contacts Notes Vic

Save Cancel Tagged New Previous Next

**Personal**

Date of birth: 11-16-1981 Age: 32 Omit from birthday lists

Gender: Female

**Email Preferences**

- Schedule reminders
- Continuing education
- Important information
- Team leader update
- Checklist reminders
- Electronic newsletters
- Recruitment appeals
- Volunteer group update

**Availability**

This field can also be shown in [VicNet \[pg:1724\]](#), on [online application forms \[pg:0413\]](#), and on the page volunteers see if they [click the preferences link \[pg:0381\]](#) at the bottom of an email message they receive.

Select *email* from the dropdown to have the type show as checked by default. Select *None* from the dropdown to make the field show as not selected by default. Be sure to click the **Save** button at the bottom of the page to save your selections.

No matter which default setting you choose, volunteers and Coordinators can still update their email preferences later.

Default (as shown when opting in to text messaging in VicNet)

*This option will only show if [text messaging is enabled \[pg:0321\]](#) for your account.* Select the option (*email*, *text*, or *none*) you want to appear as selected when volunteers opt-in to text messaging.

Type:

Default  (for new volunteers and coordinators)

Default  (as shown when opting in to text messaging in VicNet)

Reset  to

Type:

Volunteers and Coordinators will see your choice for the type in [VicNet \[pg:1724\]](#) during the [opt-in process \[pg:0323\]](#). They can either keep the setting the same, or change it.

**Custom Messages**

Email

Email with Text Notification

None

Continuing education  
Be all that you can be! Updates on education programs including new course offerings, and times and locations for classes.

Electronic newsletters

Volunteers and Coordinators can also change their choices later by returning to VicNet, or on the page they see if they [click the preferences link \[pg:0381\]](#) at the bottom of an email message they receive.

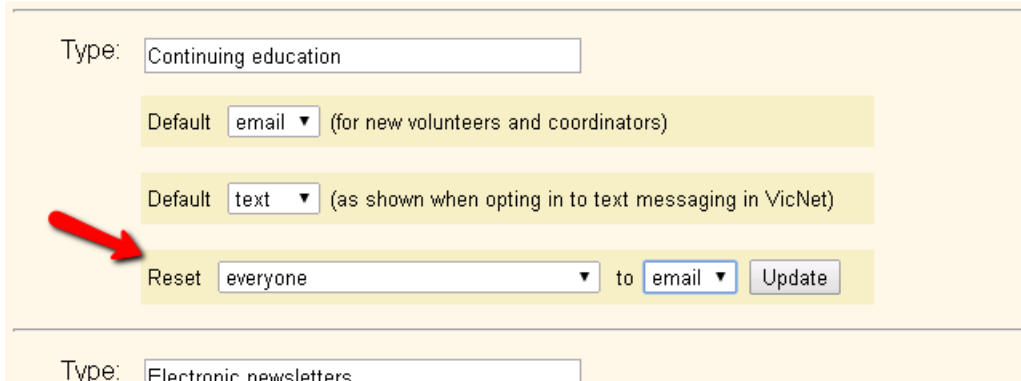
### Reset

While we urge you to respect your volunteers' and Coordinators' choices for message preferences, there may be times when you want to change the selection on records. You can do this on the individual records from the Profile tab, but you can also use this option if you need to reset the message type selections for multiple records that are currently in your database.

One instance where you may need to do this is if you are changing an existing message type from one thing to another. In this case, you will need to clear all of the existing volunteer preferences for the type. For example, if you have a message type you no longer use called "Weekend event announcements," and you want to replace it with a completely different type called "Emergency volunteer appeals." To do this, you would reset everyone's

preference to none to clear the volunteer message preferences already made for the original "Weekend event announcements" type. If you did not reset the preferences in this example, the selections volunteers made previously for "Weekend event announcements" would continue to appear for the revised "Emergency volunteer appeals" type.

The Reset option pictured below allows you to make changes to the message preferences for all records currently in your database:



Type:

Default  (for new volunteers and coordinators)

Default  (as shown when opting in to text messaging in VicNet)

Reset  to

Type:

Different options will appear depending on if the account has [enabled text messaging \[pg:0321\]](#), or not.

For accounts without text messaging, the first dropdown will only show *everybody*, and the second will show *email* and *none*. If you select *email* from the dropdown and click the **Update** button, all records will have the message type selected for the Email Preference field. If you select *none* from the dropdown and click the **Update** button, the message type will be un-checked on all of the records for the Email Preference field.

For accounts with text messaging, the first dropdown will have selections for *everybody*, *those opted in to text messaging*, and *those not opted in to text messaging*. You can use these options to select which records the message preferences will be changed for. The second dropdown will only have selections for *email* and *none*. This is because regulations do not allow you to opt someone in to receive a message by text. This is due to the possibility that a recipient could be charged a fee by their cell phone carrier when a text is received.

### Types of automatic messages

In addition to the ten mass message types described above, there are two types of messages you may configure Volgistics to send volunteers and Coordinators automatically. These are the [Schedule Reminder \[pg:0791\]](#) messages and the messages volunteers can receive when a periodic or annual [Checklist \[pg:0142\]](#) item is due to be renewed. When either of these automatic messages are enabled, a choice for the type will be included in the Message Preferences field.

Note that [Coordinators \[pg:0163\]](#) do not have Checklist items so their setting for the *Checklist reminders* type will not have any effect.

Please see the *Types of mass messages* section above if you need help with the setup options for the message types.

### Email failure threshold

The [email failure threshold \[pg:0379\]](#) controls how far back Volgistics looks at a volunteer's or Coordinator's email history to determine if their email address is valid or not. This controls when the [Email validity \[pg:0377\]](#) icon will show an email address as not being valid.

## Text Message failure threshold

The [text message failure threshold \[pg:0379\]](#) controls how far back Volgistics looks at a volunteer's or Coordinator's text message history to determine if their text message number is valid or not. This controls when the [Text Message validity \[pg:0333\]](#) icon will show a text number as not being valid.

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## Coordinator Message Preferences

Help topic 1025

Added or revised 07-29-2014

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Volgistics provides [Message Preference \[pg:0381\]](#) features needed to ensure the integrity of automatic and mass messages. These features enable people to opt-in or opt-out of different types of automatic or mass messages your organization might routinely send. For example, an individual [Coordinator \[pg:0163\]](#) might like to receive email *newsletters*, but not *fund raising requests*.

Each time you send a mass email message from Volgistics, your message includes an opt-out link at the bottom. The mail recipient can click this link to change their message preferences. When a mail recipient clicks this link, a Message Preferences window similar to the one shown below appears. Coordinators may use this window to change their message preferences. If the Coordinator has [opted-in to text messaging \[pg:0323\]](#), they will also see options for text message preferences on this page.



## Volunteer Message Preferences

Please help us communicate with you better by allowing us to send email or text messages. Please select the types of messages you wish to receive.

Click the "Save" button when you are finished.

### Send me...

Email	<input checked="" type="radio"/> Text Message	<input type="radio"/> None
-------	---	----------------------------

- Schedule reminders  
Handy reminders to help you remember when you're scheduled to serve.
- Checklist reminders  
Reminder messages for when you're due for things such as training, TB tests, flu shots, etc.

Email	<input checked="" type="radio"/> Email with text notification	<input type="radio"/> None
-------	---	----------------------------

- Continuing education  
Updates on education programs including new course offerings, and class times and locations.
- Electronic newsletters  
News about what's happening in the Volunteer Services Department.
- Important information  
Only used to communicate important news that affects you. Please DO NOT opt-out of this type of message.
- Recruitment appeals  
Stay informed of new opportunities to serve.
- Team leader update  
Information for Coordinators who lead volunteer teams.

**Please remove me from all messages.**  
I no longer wish to receive any volunteer messages from Great Lakes Volunteers.

← Click Save to save your settings

Use the Coordinator Message Preferences page to customize the way Coordinators see the Message Preference window. If you're not already at the Coordinator Message Preferences page, you can get there by choosing [Setup \[pg:0887\]](#) from the [menu \[pg:0215\]](#), then Messages, and then "Coordinator message preferences."

These setup options are similar to the setup options on the [Volunteer Message Preferences \[pg:1327\]](#) window. The difference is that *these options* control what [Coordinators \[pg:0163\]](#) see on the Message Preferences window. While the options on the [Volunteer Message Preferences \[pg:1327\]](#) window control what *volunteers* see. You can customize the Message Preferences page differently for volunteers and Coordinators.


Enter the instructions you want to appear at the top of the Coordinator Message Preferences window:

Type or [paste \[pg:0063\]](#) the text instructions you would like Coordinators to see at the top of the Message Preferences window here.

Send an alert if a Coordinator asks not to receive any messages.

If a Coordinator uses the Message Preference window to request that no further messages be sent to them, Volgistics automatically changes the Coordinator's [email validity \[pg:0377\]](#) icon to red and prevents all email from being sent to the Coordinator. If the Coordinator has opted-in to text messaging, the [text number validity \[pg:0333\]](#) icon is also changed to red and text messages are blocked from being sent.

While it is possible for [System Operators \[pg:0065\]](#) to manually press the *Reset* link beside the *Email* field on the Coordinator's record, this should only be done in cases where the selection was made inadvertently or the Coordinator has contacted the organization to request that they be returned to the list of individuals receiving their emails.

Email:   [Reset](#)

Because text messages can cost a Coordinator money if his or her cell phone carrier charges for texting, regulations do not allow you to reset a Coordinator's text preferences. If a Coordinator has opted-out of receiving text messages, he or she will need to [Resume text messaging \[\\_\\_\\_\\_\\_\]](#) so they can have texts sent to them again.

Volgistics can send an alert to the [In Box \[pg:0303\]](#) of your Volgistics mailbox letting you know that the Coordinator has asked not to receive any further messages. Check this checkbox if you would like to receive these alerts.

#### Brief description

Enter a brief description of this [message type \[pg:1321\]](#). This brief description appears along with the title of the message type to help Coordinators understand what this kind of information these messages will typically include. For example, to describe a type of mass message called *Newsletters* you might enter this brief description: "Periodic news and information about happenings at our agency."

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## Volunteer Message Preferences

Help topic 1068

Added or revised 07-29-2014

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Volgistics provides message preference features needed to ensure the integrity of automatic and mass messages. These features enable volunteers to opt-in or opt-out of different [types of automatic or mass messages \[pg:1321\]](#) your organization might routinely send to volunteers. For example, an individual volunteer might like to receive *newsletter* messages, but not *fund raising request* messages.

Each time you send a mass email message from Volgistics, your message includes an opt-out link at the bottom the recipient can use to change their message preferences. When a recipient clicks this link, a Message Preferences window similar to the one shown below appears. Volunteers may use this window to change their email preferences. If the volunteer has [opted-in to text messaging \[pg:0323\]](#), they will also see options to change their text preferences.





## Volunteer Message Preferences

Please help us communicate with you better by allowing us to send email or text messages. Please select the types of messages you wish to receive.

Click the "Save" button when you are finished.

### Send me...

Email	<input checked="" type="radio"/> Text Message	<input type="radio"/> None
-------	---	----------------------------

- |                       |                                  |                       |   |
|-----------------------|----------------------------------|-----------------------|---|
| <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> | Schedule reminders<br>Handy reminders to help you remember when you're scheduled to serve.                          |
| <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> | Checklist reminders<br>Reminder messages for when you're due for things such as training, TB tests, flu shots, etc. |

Email	<input checked="" type="radio"/> Email with text notification	<input type="radio"/> None
-------	---	----------------------------

- |                                  |                                  |                                  |   |
|----------------------------------|----------------------------------|----------------------------------|---|
| <input type="radio"/>            | <input checked="" type="radio"/> | <input type="radio"/>            | Continuing education<br>Updates on education programs including new course offerings, and class times and locations.              |
| <input checked="" type="radio"/> | <input type="radio"/>            | <input type="radio"/>            | Electronic newsletters<br>News about what's happening in the Volunteer Services Department.                                       |
| <input type="radio"/>            | <input checked="" type="radio"/> | <input type="radio"/>            | Important information<br>Only used to communicate important news that affects you. Please DO NOT opt-out of this type of message. |
| <input type="radio"/>            | <input checked="" type="radio"/> | <input type="radio"/>            | Recruitment appeals<br>Stay informed of new opportunities to serve.   |
| <input type="radio"/>            | <input type="radio"/>            | <input checked="" type="radio"/> | Team leader update<br>Information for Coordinators who lead volunteer teams.  |

- Please remove me from all messages.**  
I no longer wish to receive any volunteer messages from Great Lakes Volunteers.

← Click Save to save your settings

Use the Volunteer Message Preferences page to customize the way volunteers see the Message Preference window. If you're not already at the Volunteer Message Preferences page, you can get there by choosing [Setup \[pg:0887\]](#) from the [menu \[pg:0215\]](#), then *Messages*, and then *Volunteer Message Preferences*.

Enter the instructions you want to appear at the top of the Volunteer Message Preferences window:

Type or [paste \[pg:0063\]](#) the text instructions you would like volunteers to see at the top of the Message Preferences window here.

Send an alert if a volunteer asks not to receive any messages.

If a volunteer uses the Message Preference window to request that no further messages be sent to them, Volgistics automatically changes the volunteer's [email validity \[pg:0377\]](#) icon to red and prevents all email from being sent to the volunteer. If the volunteer has opted-in to text messaging, the [text number validity \[pg:0333\]](#) icon is also changed to red and text messages are blocked from being sent.

While it is possible for [System Operators \[pg:0065\]](#) to manually press the *Reset* link beside the *Email* field on the volunteer's record, this should only be done in cases where the selection was made inadvertently or the volunteer has contacted the organization to request that they be returned to the list of individuals receiving their emails.

Email:

Reset

Because text messages can cost a volunteer money if his or her cell phone carrier charges for texting, regulations do not allow you to reset a volunteer's text preferences. If a volunteer has opted-out of receiving text messages, he or she will need to [Resume text messaging \[\\_\\_\\_\\_\\_\]](#) so they can have texts sent to them again.

Volgistics can send an alert to the [In Box \[pg:0303\]](#) of your Volgistics mailbox letting you know that the volunteer has asked not to receive any further messages. Check this checkbox if you would like to receive these alerts.

#### Brief description

Enter a brief description of this [message type \[pg:1321\]](#). This brief description appears along with the title of the message type to help Coordinators understand what this kind of information these messages will typically include. For example, to describe a type of mass message called *Newsletters* you might enter this brief description: "Periodic news and information about happenings at our agency."

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# Online Forms Ground Rules

Help topic 1052

Added or revised 05-10-2016

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Use the Online Forms

*Ground rules* page to customize the appearance of your online forms. Online forms include the [VicNet \[pg:1724\]](#) module, [volunteer application forms \[pg:0413\]](#), and the [Opportunity Directory \[pg:0420\]](#). If you're not already on this Ground Rules page, you can get there by:

1. Choose [Setup \[pg:0887\]](#) from the [menu \[pg:0215\]](#).
2. Select *Online forms*.
3. Select *Ground rules*.

## Fonts

### Font name & size

Choose the font names and sizes you want to use for the text on your forms. The font characteristics you choose here apply to forms displayed in either the full-page or the embedded mode. See "[Adding Volgistics features to your web site](#)" [\[pg:0208\]](#) for more information about these two form modes.

Specify a font name and size for each of these three kinds of text:

- Form headings

The text used for your form headings. The heading font should generally be larger than the other fonts on the form.

- Field labels

The field label font is the font used to render the field names that appear just to the left of (or above) each input field on a form.

- Main body

This is the font Volgistics uses for all other text on the form.

Enter any font name you like. You can find a list of common fonts used on the Internet at [w3schools.com](#).

If your web site uses a particular font, selecting that font for your forms helps give your site a more unified appearance. It's best to stick with fonts known to be available to most web browsers (such as Arial, Times New Roman, and Verdana). If the font you choose is not available in a visitor's browser, the form defaults to a standard sans-serif font.

## Buttons

You can customize the buttons that appear on your online forms here. You can use an image file you saved, generate an image using a program such as Microsoft Paint, or use an online button generating program. Your image must meet the following requirements:

- GIF, JPG or PNG file extension
- Width: 200 pixels (or less); Height: 40 pixels (or less)

- File Size: 4,096 bytes (4 kb) (or less)

### Continue

This is the button users click to submit an [application form \[pg:0413\]](#), confirm their schedule choices for VicNet [self-scheduling \[pg:1494\]](#), and more. Click on the button image to be taken to a page where you can upload your custom graphic.

### Clear choices

This is the button users click to clear their [Schedule Preference \[pg:1343\]](#) selections on an application form. Click on the button image to be taken to a page where you can upload your custom graphic.

## **Full Page Form Appearance**

The settings in this section apply to forms you choose to link using the [full-page \[pg:0208\]](#) mode.

### Form panel size

Forms displayed in the full-page mode appear on a white form panel. You can control the width of this panel here.

Choose *"Adjust the form panel dynamically to fit the size of a visitor's browser window"* if you want the form panel to expand or shrink to fill the available space in a visitor's browser.

Choose *"Display the form panel with a fixed width of"* if you want the form panel to always appear with a certain width (in pixels). If you select this option, enter the width (in pixels) that you want the form panel to be and if you want the panel to be left, center, or right justified in the window. The default setting is a width of 1200 pixels, centered on the screen.

### Background

Forms displayed in the *full-page* mode appear on a white form panel that is on a colored background. Use this field to choose the color you want the form background to be. Enter the background color in RGB color notation (see *"A note about RGB color notation"* below if you're not sure what this is). You can also click in the field to bring up a color picker that you can use to select the color.

For a more integrated look, use the same background color as your own website. This will make it look more like the Volgistics form is part of your website.

### Privacy Policy

Visitors to your website may have questions about the security of the information they give you online, and how you're going to use it. For this reason you can optionally include a link to a *privacy policy* from the forms you link in the *full-page* mode. The help topic ["Online form security & privacy" \[pg:1365\]](#) offers some pointers on developing an appropriate privacy policy statement for your forms.

If you want your forms to include this link, check

*"Include a link to this privacy policy statement"*

, and then enter your own privacy policy in the space provided. For best results, prepare your privacy policy in a word processor where you can use tools like a spelling checker to check your work, and then use the [clipboard \[pg:0063\]](#) to copy and paste your finished statement into the space provided.

## Return navigation

When you display forms in a *full-page* mode, you should offer visitors an easy way to return to the page (on your website) they were on when they clicked the link to your form.

- Include a 'Close this window' link to close the browser window that contains the form

If you choose "*Include a 'Close this window' link to close the browser window that contains the form*", visitors to your forms will see a "*Close this window*" link at the bottom of each form. When they click this link, the window that contained your form will close and the visitor will return to the page in your website they were on when they clicked the form link. Choose this option if you open your forms in new browser windows. This is the default selection for this option.

- Include the following link back to a page in your own web site

If you choose "*Include the following link back to a page in your own web site*", visitors will see a link at the bottom of each form that will take them to the web page of your choice. Choose this option if you do not open your forms in a new browser window, and you want visitors to continue browsing your site when then are finished with a form.

If you select this option, you must also specify the *link text* and *link URL*.

### Link text

Enter the text for the link here. For example, if you want the link to appear as "*Return to Home Page*", enter "*Return to Home Page*" in this space.

### Link URL

Enter the web page address for the web page you want visitors to go to when they click this link. This would typically be a page within your organization's website. For example, the web page the visitor was on when they clicked the form link. An example of a URL is [www.yourwebsite.org/volunteer](http://www.yourwebsite.org/volunteer).

- No return navigation required

If you choose "*No return navigation required*", visitors will not be provided with a return navigation link at the bottom of your forms. Choose this option only if you configure your form links in a manner that would make it unnecessary for a visitor to return to an earlier page.

## Font colors

By default, the font color for forms displayed in *full-page* mode is black. You can optionally choose a different font color here for each of three kinds of text that appears on forms. Enter font colors in RGB color notation (see "*A note about RGB color notation*" below for a description of RGB color notation). You can also click in the field to bring up a color picker that you can use to select the color.

### **Embedded Form Appearance**

The settings in this section apply to forms you choose to link using the **embedded** [pg:0208] mode.

## Background

Choose the color you want the form background to be. Enter the background color in RGB color notation (see "*A note about RGB color notation*" below if you're not sure what this is). You can also click in the field to bring up a color picker that you can use to select the color.

For a more integrated look, use the same background color as your own website. This will make it look more like the Volgistics form is part of your website.

For a transparent background, leave this field blank. If your website uses a background pattern or image, leaving this field blank and linking your forms from frames that includes your website's background causes your forms to have the same background as your site.

### Font colors

By default, the font color for forms displayed in *embedded* mode is black. You can optionally choose a different font color here for each of three kinds of text that appears on forms. Enter font colors in RGB color notation (see "*A note about RGB color notation*" below for a description of RGB color notation). You can also click in the field to bring up a color picker that you can use to select the color.

### **A note about RGB color notation**

There are several fields on this page for setting background and font colors. Enter color information in these fields using standard hexadecimal RGB color notation. This is the color notation used in HTML (Hypertext markup language) to specify color attributes for web page elements. Hexadecimal RGB color notation includes the '#' character followed by a six character RGB color value in hexadecimal notation (hex).

These are some examples of this notation:

#FFFFFF (white)

#000000 (black)

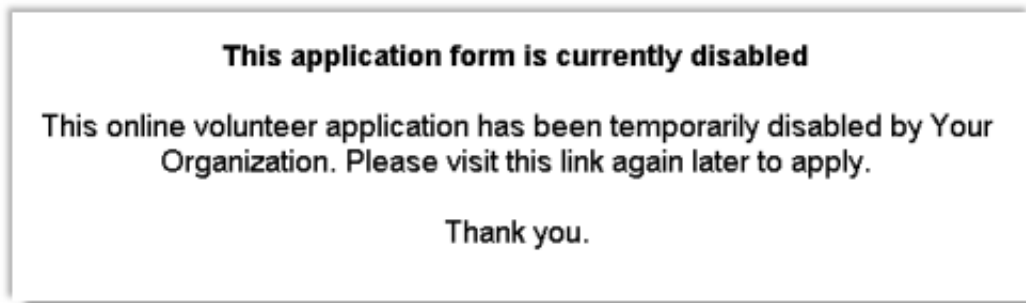
#FF0000 (red)

#00FF00 (green)

If you click on the field itself, a color picker will appear that makes it easy to select the color you need. You can also learn more about hexadecimal RGB colors for websites at [w3schools.com](http://w3schools.com)

### **Disabled Form Message**

If you add a link to an [online volunteer application form \[pg:0413\]](#) from your web site, and then later [disable that application form \[pg:1357\]](#) for any reason, visitors who click the disabled form's link will receive the following default message:



If you would like a different message to appear when a visitor clicks a link to an application form you have disabled, enter it in this space.

### **Related help**

[Help Topic 1075 \[pg:1451\]](#) - Customizing VIC Graphics

[Help Topic 1159 \[pg:1670\]](#) - Can I put a link to VicNet on the volunteer application form?

[Help Topic 1187 \[pg:1353\]](#) - How to Upload Logo Graphics

[Help Topic 2125 \[pg:1362\]](#) - Creating Links to Your Volunteer Application Form

[Help Topic 2153 \[pg:1491\]](#) - Creating Links to VicNet

[Help Topic 2252 \[pg:0208\]](#) - Adding Volgistics Features to Your Web Site

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## Application Form Setup Page

Help topic 1053

Added or revised 01-18-2017

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Use the Setup page to tailor the kinds of information collected through an [online volunteer application form \[pg:0413\]](#). You get to this *Setup* page by choosing [Setup \[pg:0887\]](#) from the [menu \[pg:0215\]](#), selecting 'Online forms,' choosing 'Volunteer application forms' and then clicking on the name of the form you want to setup.

Visit the online form [Ground rules \[pg:1330\]](#), and [Logo graphic \[pg:0516\]](#) windows for settings related to *graphic* style of your online forms.

### Title

Enter the title you want to appear at the top of this application form

This will be the form name applicants see at the top of the form. This is usually something like 'Volunteer application form,' 'Registration form,' or a form name specific to your situation, such as 'Docent Application Form.'

Enter a name for internal use that describes this application form

Since you can have more than one volunteer application form, you need to give each form you create a unique name. Enter a unique name for this form here. The only people who will see this name are you, and other System Operators who have access to setup.

### Instructions

Enter the instructions you want to appear at the top of the form

If you want to provide applicants with any general instructions about how they should complete the application form, enter them here. For best results, consider composing your instructions in a word processor where you can use tools such as spell checker, and then copy and paste the instructions into this space.

If your form has one or more fields that require an entry, this would be a good place to explain that the fields which are followed by a red asterisk are required. It may also help to explain that the applicant should click the 'Continue' button at the bottom of the form when they're finished.

### Content

Use the links in this section to tailor the way this application form appears on the Internet. These setup links may be available:

[Site selection \[pg:1338\]](#)

This link will take you to the [Site Selection \[pg:1338\]](#) setup page. This page's setup options will function differently depending on if your account has [Site Level Access \[pg:0092\]](#) enabled or not. When Site Level Access is not enabled, this page's purpose is limited to making [Assignments \[pg:0096\]](#) that fall under a particular Site appear when Assignment Preference fields are used on the report. When Site Level Access is enabled, this page's setup options control which Site(s) will receive applications submitted through this form. If you're setting up one form for each Site, use this link to specify the Site each application is for.

### [Form sections \[pg:1340\]](#)

Volgistics organizes the fields on your application form under different form sections. Use the *Form sections* link on the Setup window to establish the sections you would like this application form to have, and to specify their headings and instructions.

### [Fields \[pg:1341\]](#)

Use the Fields setup window to choose the Core tab and Profile tab fields you would like to collect information for.

### [Schedule fields \[pg:1343\]](#)

If you use Volgistics to manage volunteer schedule openings and you want applicants to indicate their preference for actual schedule openings, use the *Schedule fields* link on the Setup window to specify which schedule openings are to be offered on this application form, and how applicants indicate their schedule preference.

### [Comment fields \[pg:1345\]](#)

If you would like your application form to include spaces for applicants to enter narrative information (for example, space for applicants to 'describe any previous volunteer work' they have performed'), use the *Comment fields* link on the Setup window to choose where these fields should appear, and what instructions they should include for the applicant.

### [Contact fields \[pg:1346\]](#)

You can ask applicants to list emergency contacts, employers, references, parent or guardian names, or any similar kind of contact appropriate to your organization. Use the *Contact field* links on the Setup window to define the kinds of contact information you want to collect and where it should appear on the form.

### [I Agree section \[pg:1348\]](#)

Click the

*I Agree section*

link on the Setup window to configure an acceptance section at the bottom of the form in which you can ask applicants to accept a [policy statement or agreement \[pg:0420\]](#).

### [Receipt confirmation \[pg:1349\]](#)

Use the *Receipt confirmation* link on the Setup window to customize the message applicant's see after they submit their application form, and whether or not you want to acknowledge newly submitted applications by email.

### [Display assignment names as links to assignment profiles](#)

If your volunteer application form includes fields for collecting assignment or schedule preferences, checking this option causes the assignment names in these fields to appear as hyperlinks. When an applicant clicks any of these assignment name hyperlinks, the assignment profile opens for the selected assignment. An applicant can click on any assignment name to learn more about that assignment.



You can tailor the way assignment profiles appear under the [Opportunity Directory \[pg:1368\]](#) settings.

If your volunteer application form does not include fields for collecting assignment or schedule preferences this option has no effect on your application form.

## Status

Use the Status drop-down list to select the volunteer [status \[pg:1832\]](#) you want people who submit *this* volunteer application form to have when their application form is first received. The default selection is 'Applicant.' This helps you distinguish between new 'applicants' (who you may not yet recognize as volunteers) and 'active' volunteers using the Status field.

## Type

If you want all of the people who submit *this* application form to always have a specific [Type \[\\_\\_\\_\\_\\_\]](#) when you first receive their application form, select that Type from the Type drop-down list.

If you create more than one volunteer application form, you can use the Type field to determine which application form a given applicant used. For example, if you have one application form for 'Adults' and another for 'Juniors' you can set the Type on the 'Adult' application form to 'Adult,' and the Type on the Junior application to Junior. You will be able to determine which form an applicant used to apply by looking at the Type column on the Applications tab in the Volgistics Mailbox before receiving the application. Once the application has been received, the Type field on the Core tab in the volunteer's record will also automatically contain the Type associated with the form they used to apply.

Since volunteers may only have one Type, if you specify a Type here you cannot also allow volunteer's to choose their Type on the application form. If you want volunteers to be able to choose a Type from the Type field on the application form, do not select a Type here. Instead, add the Type field to the application form using the Fields link above.

[Help topic 2018 \[pg:0963\]](#) explains how to add additional items to drop-down lists such as the Type field.

## Flag

If you want all of the people who submit *this* application form to always have a specific [Flag \[\\_\\_\\_\\_\\_\]](#) when you first receive their application form, select that Flag from the Flag drop-down list.

If you create more than one application form, one way you can determine which application form a volunteer used to apply is by specifying a specific Flag for each form. Then you'll know from the Flag field in the applicant's record which form they used to apply (the Flag field appears on the Core tab in each volunteer's record).

[Help topic 2018 \[pg:0963\]](#) explains how to add additional items to drop-down lists such as the Flag field.

## Kind

If you use both [Group \[pg:1909\]](#) and individual records in your account, and you want all the people who submit *this* application to always have a specific Kind (Group or Individual), select the Kind from the dropdown list. This is useful if you create different application forms with different fields for groups and individuals.

## Alerts

If you would like to have an alert sent to a designated Volgistics [System Operator \[pg:0065\]](#) each time someone submits a volunteer application through this online volunteer application form, choose that System Operator's name here.

## Send the alert to

Check "To the Volgistics mailbox" if you would like a copy of the alert sent to the Volgistics mailbox. The alert will appear on the [In Box \[pg:0303\]](#) tab each time a new application is submitted.

Check "By email" if you would like a copy of the alert sent by email to the selected System Operator's email address.

Check "By text message" if you would like a copy of the alert sent by text message to the selected System Operator's cell phone. This option will not appear in accounts that have not [enabled text messaging \[pg:0321\]](#).

## **Application auditing**

By default, all new volunteer applications submitted online are initially staged on the Applications tab in your Volgistics mailbox. This gives you an opportunity to screen new applications for potential duplicates, and to look at the applicant's name entry to be sure it's not a phony application (e.g. "Mickey Mouse") *before* the new volunteer record is added to your database.

If you would prefer that new applications go directly into your database without screening, check the *Bypass auditing* checkbox.

When

### *Bypass auditing*

is checked, all new applications submitted through this online volunteer application form will go directly into your Volgistics database rather than being staged in your Volgistics mailbox, as long as your database has space for new volunteer records. If your database does not have space for new volunteer records (based on your account's [service level \[pg:0719\]](#)), then all new applications will be held on the Applications tab in your Volgistics mailbox until you make space available to receive them into your account (online volunteer application forms will continue to accept new applications even if your database does not have space for new volunteer records).

When *Bypass auditing* is checked no duplicate checking can be performed. If a volunteer who is already in your database submits a new application form, an additional volunteer record will be added for them.

New records that you receive through this online application form will always have the initial volunteer Status, Flag, and/or Type selected for the form, whether or not you screen new applications in your Volgistics mailbox. So you can still identify new applicants based on a Status, Flag, or Type designation even if you do not screen new applications in your Volgistics mailbox.

## **Links**

### Temporarily disable links to this form

Check this checkbox, and then click the **Save** button if you want to temporarily disable links to this application form. You might choose to disable this application form while you make changes to it, or if the event for which you were collecting applications has past (but you don't want to delete the application form yet). When the application form is disabled, links to the form from your web site will display a "temporarily unavailable" message.

You can optionally customize the message that appears when an application form is disabled on the [Online forms ground rules \[pg:1330\]](#) page.

## Preview buttons

You may create links to your volunteer application form in either a 'full-page' mode or an 'embedded mode' [pg:0208]. To preview your application form in either mode, click the appropriate preview button at any time to see how the form looks. This is a useful tool as you develop a new application form because it lets you see how your form will appear online as you're making changes to the way the form is setup.

## The link for adding this application form to a web page is...

This section shows you the proper HTML (Hypertext markup language) tags for inserting links [pg:1362] to this application form on your own web site. The form number for this application form appears in this section. Your links must include this form number or they will not work properly.

## **Submissions**

A count of the number of times this online volunteer application form has been submitted since the date the submission count was last reset.

Click the **Reset this count** button if you want to reset this count to zero and start counting over again.

This count is provided as a simple indication of the frequency with which this online volunteer application form is submitted by visitors to your web site. It may not provide an accurate indication of the number of new volunteers you have because you may not accept all of the application forms submitted, and some application forms may be for people who are already registered volunteers.

A more accurate way to count to new volunteers is to use the Statistics report on the Print page; or a **Set** [pg:0858] that finds all of the volunteers who have started during a time period you specify [pg:0841].

## **Delete**

Use the **Delete** button at the bottom of the Setup window to delete a volunteer application form. If you delete a volunteer application form, any received or pending applications submitted through the form will remain in your system, but the form itself will be deleted. If there are any links on your web site for the form you're deleting, they will no longer work. It's best to remove any links to the application form before you delete it.

Click the **Save** button to save changes you make to the setup window. Changes you make to a volunteer application form take effect online immediately after you save them.

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## **Site Selection**

Help topic 1054

Added or revised 08-10-2015

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If you are not already on the Site Selection page, you get there by:

1. Select **Setup** [pg:0887] on the **menu** [pg:0215].
2. Expand the *Online forms* link.
3. Select *Volunteer application forms*.

4. Select the name of an application form.

5. Select *Site selection*.

The Site Selection field for application forms will function differently depending on if your account has [Site Level Access \[pg:0092\]](#) enabled or not.

### **Site Level Access is *Not* Enabled**

If your account is not using [Site Level Access \[pg:0092\]](#), the settings on this page will not make much difference to your account. This is because volunteers will not be assigned to a certain Site based on their selections on the application form, and all [System Operators \[pg:0065\]](#) are essentially headquarters operators because they already have access to all the Sites in your account.

The exception to this is if you use the

*This application is for this site only*

settings to make the application form apply to one specific Site. While this will not limit System Operator access to the form or assign volunteers to a specific Site, it will limit the [Assignments \[pg:0096\]](#) that appear in the Assignment Preference field to just Assignments from the Site specified. [Help topic 2055 \[pg:0967\]](#) explains more.

### **Site Level Access *is* Enabled**

If you use the [Site Level Access \[pg:0092\]](#) feature, this page is where you control which Site(s) will receive applications submitted through an application form.

With the Site Level Access option, you need to decide who should receive new volunteer applications. Applications can be directed just to the headquarters site, one particular Site, or multiple Sites if the applicant is interested in assignments at more than one Site.

[Applicants will not select a Site. Send all applications to headquarters](#)

Choose this option if you would like all newly submitted volunteer application forms to be delivered to the headquarters site mailbox only. [Site-Level Operators \[pg:1442\]](#) will not receive applications submitted through *this* form in their Site's Volgistics mailbox.

[This application is for this Site only](#)

If this volunteer application form is for a single Site, choose this option and then select the Site's name from the list of Sites. With this option selected, applications submitted through *this* volunteer application form will only appear in the selected Site's Volgistics mailbox (note, the headquarters Site can see all of the pending applications in all mailboxes by checking the *All Sites* checkbox on the Applications tab in the headquarters' Volgistics mailbox).

[Determine applicant's Site\(s\) based on their choice of...](#)

If your application form includes any [preference fields \[pg:1011\]](#), you can configure *this* volunteer application form so that newly submitted applications appear in the Volgistics mailboxes for each of the Site's that have an assignment that matches the applicant's selections on the form.

**Preference fields** [pg:1011] are fields applicants can use to indicate the volunteer assignment they're interested in, or the kind of volunteer assignment(s) that most interest them. You can have a Preference field setup for a Site, Place, Assignment, **Assignment Cluster** [pg:0934], **state** [pg:1016], **Characteristic** [pg:0033], or the **customizable fields** [pg:0957] in the Detail box on the Assignment record.

This is an example of how you might use the Preference field on your volunteer application form, and how a volunteer's preference would determine which Site(s) their application will be sent to. *A multi-county organization has a Volgistics site for each of their counties, and they create a Preference field that allows applicants to choose the county/counties where they would prefer to serve.* If this organization sets-up the Preference field in this example so applicants can choose only one county, application forms will go only to the Site for the county selected on the form by the applicant.

If this organization sets-up the Preference field so applicants can choose more than one county, application forms will go to each of the Sites for the counties selected on the form by the applicant.

Click the **Save** button to save your changes to the Site selection page, or the **Cancel** button to close the page without saving your changes.

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## Form Sections

Help topic 1055

Added or revised 01-18-2017

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The *Form sections* page is where you establish the sections you would like an **application form** [pg:0413] to have by entering their headings and instructions. You get to *Form sections* by clicking the 'Form sections' link on an application form's **Setup** [pg:1334] page .

Your form must have at least one section, and it can have as many as twelve. Each section must have a heading, and optionally written instructions which will appear beneath the heading.

Create a section for each logical grouping of fields you plan to have on your application form, or any field that needs special instructions. Here are some examples of different section headings you might use on your form:

- Name and address
- Demographic information
- About you...
- Skills
- Assignment preference
- Past experience
- Emergency contact
- References
- Employer information
- Previous volunteer experience
- Why are you interested in volunteering?
- Your Availability
- When can you serve?

Sections appear on the form in the order in which you establish them on this page.  
Enter a heading for this section, or leave the heading blank to skip this section

Enter a section heading for each of the form sections you'd like to use. The section heading appears at the beginning of the section in the **heading font** [pg:1330] you choose for your online forms.

Enter the instructions you want to appear at the top of this section

Optionally enter any instructions you would like to appear beneath the section heading. These would typically explain how the visitor should complete the fields that appear within this section.

This is an example of the section headings and instructions on a volunteer application form:

The screenshot shows a form with two sections. The first section is titled "Demographics" and includes instructions: "You may optionally provide the following information. It is used only to help us get a better idea of the demographic make-up of our volunteers." Below the instructions are three dropdown menus: "Date of birth:" with "Month", "Day", and "Year" options (with "(year optional)" text), "Gender:" with a "Choose" option, and "Education:" with a "Choose" option. The second section is titled "Skills & Experience" and includes instructions: "In which of these areas do you feel you have moderate to excellent skill? Check all that apply." Below the instructions are six checkboxes with labels: "Accounting", "Carpentry", "Computer data entry", "Counseling Others", "Grant writing", and "Graphic Arts". Red arrows on the left side of the form point to the "Heading" and "Instructions" for both sections.

Move Up  
Move Down

Your form sections will appear in the order in which they appear on the Form Sections page. Use the **Move up** and **Move down** buttons if you want to change the order of your form's sections.

You use the [Fields \[pg:1341\]](#), [Schedule fields \[pg:1343\]](#), [Comment fields \[pg:1345\]](#), and [Contact fields \[pg:1346\]](#) windows to choose the fields you want to appear in each section.

Click the **Save** button to save your changes to the Form sections page, or the **Cancel** button to close the page without saving your changes.

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## Volunteer Application Form Fields

Help topic 1056

Added or revised 01-18-2017

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The

### *Fields*

page is where you choose the Core tab and Profile tab fields you would like to use to collect information on your [volunteer application form \[pg:0413\]](#). You get to the *Fields* page by clicking the 'Fields' link on an application form's [Setup \[pg:1334\]](#) page.

For each field you want on your application form, use the drop down list located beside the field name to choose the form section where you would like the field to appear. Choose 'Omit' from the drop down list for any field you do not want to appear on this application form.

Place a check mark in the 'Required' checkbox for any fields for which applicants should be required to make an entry. These fields will have a red asterisk located beside them on the application form indicating that they require an entry. Applicants will not be able to submit their information until they have entered something in each of the required fields. Use required fields sparingly. Forms that contain too many required fields can cause some visitors to give up before they complete the form.

You may not see every field you want your application form to include listed on the Fields page. Consider these additional resources in this case:

- If you want to add fields applicants will use to choose the schedule opening(s) they're interested in filling, use the [Schedule fields \[pg:1343\]](#) setup options.
- If you want to add fields for collecting information about emergency contacts, references, employers, parents, or other kinds of volunteer contacts, use the [Contact fields \[pg:1346\]](#) setup options.
- If you want to add space for open-ended narrative entries (e.g. "Explain why you're interested in volunteering..."), use the [Comment fields \[pg:1345\]](#) setup options.
- If you want to add fields for gathering data about specific volunteer characteristics (e.g. skills, interests, hobbies, etc.) consider adding a new [Characteristic field \[pg:0033\]](#) to your database. After you setup a new *characteristic field* it will appear here on the Fields window where you can then add it to your form.
- If you want to add fields for gathering information about the assignment, kind of assignment, or location applicants are interested in, consider adding a new [preference field \[pg:1011\]](#) to your database. After you setup a new *preference field* it will appear here on the Fields window where you can then add it to your form.
- If you want to add fields for collecting additional demographic information such as

Education or training information

Marital status

Are you a relative of a current or former patient?

Do you smoke?

Do you have a 4 wheel drive vehicle?

Certification numbers (RN, Diver)

Driver's license numbers

- Consider [customizing an additional Profile tab field \[pg:0957\]](#) for this information. Volgistics includes a series of customizable Profile tab fields which are initially hidden. Once you un-hide any of these fields, and give them a field name that suits your needs, they will appear on the Fields window where you can then add them to your form.

When you add a field to your volunteer application form, the field appears on the form with the same field name you see in Volgistics. For example, if the field name is 'Last name:' in Volgistics, it appears on the volunteer application form as 'Last name:.'

Similarly, fields you place on your volunteer application form have the same field properties on the application form that they have in your volunteer records. A field that appears as a drop-down list in the volunteer record – such as the State or Province field – also appears as a drop down list on the application form. In addition, the same drop down list options you see for the field in your volunteer records appear when you visit the field on the application form.

You can change most field names – and for drop down lists the options available for you to choose from the drop-down – under [Field Options \[pg:0957\]](#).

Click the **Save** button to save your changes to the Fields page, or the **Cancel** button to close the page without saving your changes.

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## Schedule Fields

Help topic 1057

Added or revised 01-18-2017

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Use the *Schedule fields* page to specify which [schedule openings \[pg:0776\]](#) are to be offered on a [volunteer application form \[pg:0413\]](#), and how applicants indicate their schedule preference. You get to the *Schedule fields* page by:

1. Select [Setup \[pg:0887\]](#) from the menu.
2. Expand the *Online forms* link.
3. Select *Volunteer application forms*.
4. Select the name of a form.
5. Select *Schedule Fields* under the **Content** heading.

Before you can place schedule fields on your application form, you must have one or more assignments in your database with a schedule that has [schedule openings \[pg:0776\]](#).

### If you want to allow applicants to select openings

Use the dropdown list to choose the [form section \[pg:1340\]](#) you want the schedule fields to appear under. If you do not want to use schedule preferences with this application form, choose *Omit* from the dropdown.

### Allow applicants to sign-up for schedules in

Use this dropdown list to choose the Assignment(s) you want applicants to be able to choose [schedule openings \[pg:0776\]](#) for on this volunteer application form.

- Choose *All assignments* if you want applicants to be able to choose schedule openings for all volunteer assignments that have schedule openings.
- Choose the a name of a specific [Site \[pg:0110\]](#) if you want applicants to be able to choose schedule openings from all assignments under a specific Site that have schedule openings.
- Choose the a name of a specific [Place \[pg:0108\]](#) if you want applicants to be able to choose schedule openings from all assignments under a specific Site that have schedule openings.
- Choose the a name of a specific [Assignment \[pg:0106\]](#) if you want applicants to be able to choose from all schedule openings setup for a specific assignment.



## Hint!

If you have specific Assignments that you do not want openings to appear for, check the "Never include this schedule on online volunteer application forms" checkbox on the Rules tab of the Assignment. You can learn more about this [here \[ \]](#).

### List schedule openings

Your application form can list schedule openings starting on the current date (for a certain number of days forward), or schedule openings that fall between two dates you specify.

Choose 'For the next \_\_\_ days' if you want the form to offer schedule openings starting on the current date, continuing forward for the specified number of days (up to 60 days forward). For example, choose this and select '10' if you want the form to list schedule openings beginning on the current date (whatever day it is when an applicant visits the form) through the next ten days.

Choose 'Between \_\_\_ and \_\_\_' if you want the form to offer schedule openings for a specific period of days, and then enter the beginning and ending dates you want to include. If you're registering volunteers for a special event, you could choose this option and then enter the first and last date of your event. This would make the application form list only the schedule openings during the event.

**Please remember** that your form will need to open the schedule file for each opening on each Assignment you select in the *Allow applicants to sign-up for schedules in* section, as well as each date in the date range you select. Having a large number of Assignment openings show and/or a large date range selected can slow down how fast your form loads for applicants.

If the 'Show opening notes' checkbox is checked, [opening notes \[pg:0750\]](#) will appear along with the rest of the opening information on your application forms. If the box is un-checked, the opening note information will not appear.

### Applicants can

Use this setting to control the number of schedule openings an applicant can choose, and if you want applicants to rank their choices or not.

Choose 'Sign-up for \_\_\_ openings' if you do not want applicants to rank their schedule preferences. Then, use the dropdown list to choose the number of openings an applicant should be allowed to choose. Select 'in all' if you want to limit the number of openings an applicant can choose overall on the form, or 'per day' if you want to limit the number of openings an applicant can choose for each date schedule openings appear on the form.

Choose 'Rank their first \_\_\_ choices' if you want applicants to rank their schedule preferences (e.g. 1st choice, 2nd choice, etc.). Then, use the dropdown list to choose the number of choices applicants should be allowed to make (e.g. choose '3' if you want applicants to rank their first 3 choices). Select 'overall' if you want applicants to choose this many schedule preferences overall on the form, or 'per day' if you want them to rank their choices this way for each date schedule openings appear on the form.

### Show assignment names

Use these settings to control how you want the assignments to appear on your form.

Choose 'Without Site and Place names' if you just want the name of the assignment to show.  
Choose 'With Site and Place names' if you want the Site and Place information to show in brackets behind the assignment's name.

### Receive applicant schedule selections as

Use these settings to control how the applicant's selections will appear.

Choose 'Schedule preferences (allows you to approve schedules)' if you want to approve the applicant's selections before they actually appear on your schedule. With this option, you must [receive applications into your account \[pg:0415\]](#) if you audit your applications forms, and then [approve the applicant's preferences \[pg:0773\]](#), before the applicant's choices will appear on the schedule. For this reason, you may end up with more preferences than you have room for. For example, if you have an opening setup to have 8 volunteers needed, and you receive 12 applications where the opening is selected as a preference--4 of the applicants will not be able to fill the opening.

This option works best for organizations that like to pick the most qualified volunteers to fill an opening. However, you may need to communicate with the applicants who you did not select to fill the opening to let them know that they are not scheduled for the date and time they picked on the application form.

Choose 'Actual schedule entries' if you want the applicant's choices to go directly onto the schedule. This option allows the number of schedule openings to update in real time as long as you have the 'Bypass auditing' box checked on the [application form setup page \[pg:1334\]](#). For example, if you have an opening setup to have 3 volunteers needed, once three applicants have selected the opening and submitted their forms the opening will no longer appear as a choice for future applicants.

This option works best for organizations (such as festivals and other one time events) that have volunteers who are applying just to work at the event.

### **Remember to Save**

Remember that you must click the **Save** button to keep your changes to the Schedule fields page after you make them. You can also click the **Cancel** button to close the page without saving your changes.

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## **Comment Fields**

Help topic 1058

Added or revised 08-10-15

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Use the *Comments fields* page to setup narrative text fields on your [volunteer application form \[pg:0413\]](#). You get to the *Comment fields* page by clicking the 'Comment fields' link on an application form's [Setup \[pg:1334\]](#) page.

Comment fields provide space on an application form for an applicant to enter narrative text. Use comment fields anywhere you'd like to ask an applicant a question they should answer by typing a few sentences (or more). These are some examples of questions that often appear on volunteer application forms for which comment fields are appropriate:

Why do you want to volunteer with us?  
Describe your employment history  
List other organizations you've volunteered for

Is there anything else you'd like to tell us about yourself?  
If you've volunteered here before, when and in what capacity?  
What are your career objectives?

The information applicants type into comment fields on the application form appears on the Notes tab in their volunteer record after you receive their form.

#### Section name

You can include one comment field in each of your application [form sections \[pg:1340\]](#). To add a comment field to a particular form section, place a checkmark next to the section name.

#### Instructions

Enter the question you want to ask in this space.

Click the **Save** button to save your changes to the Comment fields page, or the **Cancel** button to close the page without saving your changes.

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## Contact Fields on Application Forms

Help topic 1059

Added or revised 08-10-2015

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You can add fields to track a volunteer's or group's contacts to your application forms. You get to the *Contact fields* page by clicking the name of a contact "kind" on an application form's [Setup page \[pg:1334\]](#). For example, if you need to add fields for collecting an applicant's references, select "Reference Fields." Here are the kinds of contacts available by default:

## Instructions

Enter the instructions you want to appear at the top of the form:

Please complete this application form if you are interested in becoming a volunteer. Once you complete the form, click the submit button at the bottom.

## Content

Use these links to tailor the way this application form appears on the Internet.

[Site selection](#)

[Form sections](#)

[Fields](#)

[Schedule Fields](#)

[Comment Fields](#)

[Emergency contact Fields](#)

[Employer Fields](#)

[Reference Fields](#)

[Relative Fields](#)

['I Agree' Section](#)

[Receipt confirmation](#)

Display assignment names as links to assignment profiles

If you would like to collect a certain kind of contact information, but you don't see that kind of contact listed on the Setup page, you can create a new contact kind in Volgistics. For instance, if you want to track "Parent or Guardian" information for some volunteers, but you don't see "Parent or Guardian" listed as a kind of contact, you can add it.

To create a new kind of contact:

1. Select "Setup" from the [menu \[pg:0215\]](#).
2. Expand the "Field options" link.
3. Choose "Contacts tab."
4. Scroll down and choose the "Kind" field.
5. Use the "Add a new item" field to enter the new kind of contact you want to track, and then click the **Save** button. When you return to the Setup window for your volunteer application form, you'll be able to add the new contact kind to your form.

## Form section

If you want applicants to list this kind of contact on the application form, choose the [form section \[pg:1340\]](#) where you want these fields to appear. Choose "Omit" if you do not want applicants to list this kind of contact on this application form. It's usually a good idea to create a form section just for tracking the contact kind you're

adding to the application.

### Quantity

Choose the number of different contacts (up to 4) you want applicants to list on the form. For example, if you want applicants to list three references, choose "3" here.

### Fields

Place a checkmark in the Include column for each contact field you want on your application form.

#### **Please note:**

In order for the system to save the contact information applicants submit, you must include the *Last name* and the *First name* fields. If these fields are not included, there is not a way for the system to make a new contact record on the Contact tab of the applicant's record.

Place a check mark in the Required column for any fields for which applicants should be required to make an entry. In most web browsers, these fields will have a red asterisk located beside them on the application form, which indicates that they require an entry. Applicants will not be able to submit their information until they have entered something in each of the required fields. *Use required fields sparingly. Forms that contain too many required fields can cause some visitors to give up before they complete the form.*

Click the **Save** button to save your changes to the Contact Fields page, or click the **Cancel** button to close the page without saving your changes.

---

## I Agree Section

Help topic 1060

Added or revised 08-10-2015

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You get to the *I agree section* page by clicking the 'I agree section' link on an application's form [Setup \[pg:1334\]](#) page.

When you include an 'I agree section' on an [application form \[pg:0413\]](#), the form will include a statement of your choice near bottom, followed by an 'I agree' checkbox. Before an applicant can submit their form they must check this 'I agree' checkbox. This feature is typically used to confirm an applicant's acceptance of any volunteer [terms or policies \[pg:0420\]](#) you have in your organization.

### Include an agreement section

Check this checkbox if you want this application form to include an 'I agree' section. Uncheck this checkbox if you don't want this form to have such a section.

Enter a name for the form section that will include the agreement checkbox

Enter the heading you would like this section of the form to have.

Enter the agreement statement you want to appear next to the 'I agree' checkbox

Enter the statement you want applicants to accept. See [Volunteer policy, confidentiality, and release agreements \[pg:0420\]](#) for more information.

For best results, prepare your statement in a word processor where you can use tools like a spelling checker to check your work, and then use the [clipboard \[pg:0063\]](#) to copy and paste your finished statement into this space.

#### Initially display the 'I agree' checkbox

Use this option to choose whether or not you want the 'I agree' checkbox to be checked by default when a visitor opens the application form. It's usually a good idea to use the 'Unchecked' option, since this requires the applicant to consciously place a checkmark here before they can submit the form.

Click the **Save** button to save your changes to the I agree section page, or the **Cancel** button to close the page without saving your changes.

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## Receipt Confirmation

Help topic 1061

Added or revised 08-10-2015

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Use the *Receipt confirmation* window to customize the page applicant's see after they submit their [application form \[pg:0413\]](#), and whether or not you want to acknowledge newly submitted applications by email. You get to the *Receipt confirmation* page by clicking the 'receipt confirmation' link on an application form's [Setup \[pg:1334\]](#) page.

### **Submit button confirmation**

Use this section to tailor the page applicants see after they successfully submit their volunteer application form. This typically includes a message that says "you have received their application form," and explains what happens next.

#### Enter a heading for your acknowledgement message here

Enter the heading you want to appear on this page. This typically something like 'Thank you,' 'Finished!,' or 'Complete.'

#### Enter or paste your acknowledgement message here

Enter the actual message you want to appear on this page. It's a good idea to confirm that "you have received" their application form, and explain what happens next. For example 'someone will contact you soon,' or 'you will receive more information in the mail,' depending on your organization's specific application procedures.

For best results, prepare your message in a word processor where you can use tools like 'spell check' to check your work, and then use the [clipboard \[pg:0063\]](#) to copy and paste your finished message into this space.

### **Automatic email confirmation**

Volgistics can automatically send email confirmations to people who submit online applications. These messages are typically used to acknowledge your receipt of the application form, and to explain what happens next.

Volgistics can send automatic email confirmations if

1. Your application form includes the Email field from the Core tab.
2. An applicant enters a valid email address on their application form in this field.

The Volgistics system generally sends these confirmation emails within a few minutes of the time someone successfully submits an application form.

Who should these confirmation email messages be from

Enter whatever you would like to appear in the 'From' field on these confirmation messages (that is, who is the email message from?). This could be the name of your organization, an individual's name, or your email address.

What "reply to" email address should your acknowledgement email have

Enter the valid email address you want to appear as the 'Reply-to' address in these email messages. This must be a valid email address for your organization. This is the address a reply message will go to if the email recipient uses their email program's 'Reply' button to reply to the message.

What should the subject of your confirmation email message be?

Enter whatever you would like to appear as the 'Subject' of these confirmation messages. Some likely examples would be "Volunteer application acknowledgement," "We have received your volunteer application form," or "Thank you for volunteering."

Enter or paste the content of the email confirmation message here

Enter the text message you want to appear in the body of these acknowledgement emails. This is where you would typically thank the recipient for their application, and explain what happens next in your volunteer application process. . For example 'someone will contact you soon,' or 'you will receive more information in the mail,' depending on your organization's specific application procedures.

For best results, prepare your message in a word processor where you can use tools like a spelling checker to check your work, and then use the [clipboard \[pg:0063\]](#) to copy and paste your finished message into this space.

These automatic email confirmation messages are always sent as plain text (you cannot format your message in HTML or send attachments).

Click the **Save** button to save your changes to the Receipt confirmation page, or the **Cancel** button to close the page without saving your changes.

**Related Videos**

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## How do I collect Assignment Preferences on an application form?

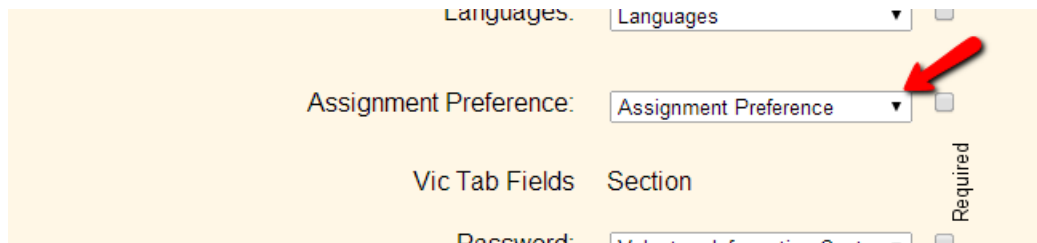
Help topic 1165

Added or revised 01-18-2017

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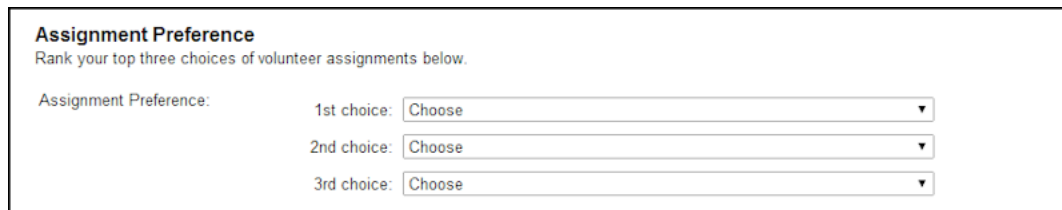
By default, there is an Assignment Preference field on the Profile tab in the volunteer record. Allowing an applicant to select which Assignment(s) they prefer to serve in can be as easy as adding this field to the [online application form \[pg:0413\]](#).

On the [Application form setup page \[pg:1334\]](#), click on the "Fields" link. Scroll down to locate the Assignment Preference field, and select from the drop down list the form section where it should be placed on the form. If you want, you can create a form section specifically for the Assignment Preference field. In the example below, the Assignment Preference field is being added to the application form in the section called "Assignment Preference."



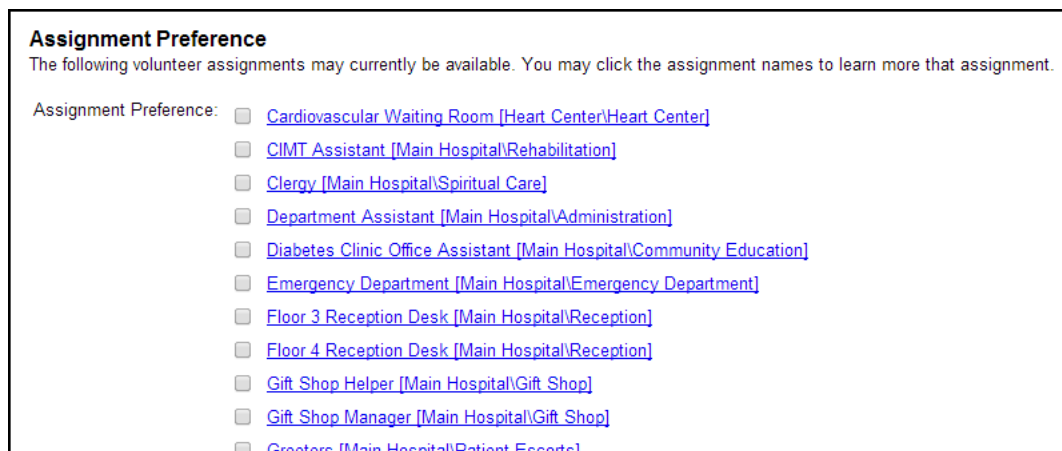
The screenshot shows a configuration interface for an application form. It features several fields with dropdown menus and checkboxes. The 'Assignment Preference' field is highlighted with a red arrow pointing to its dropdown menu, which currently displays 'Assignment Preference'. To the right of this field is a 'Required' checkbox. Below the 'Assignment Preference' field, there are labels for 'Vic Tab Fields' and 'Section'. Other visible fields include 'Languages' and 'Password'.

Once you save your changes to place the field on the form, it will be added to the form and applicants will be able to make Assignment Preference selections when they apply. If you have the Assignment Preference field setup to rank each choice, it will appear similar to this on the application form:



The screenshot shows a form section titled 'Assignment Preference'. Below the title is the instruction: 'Rank your top three choices of volunteer assignments below.' The form contains three rows, each with a label and a dropdown menu: 'Assignment Preference: 1st choice: Choose', '2nd choice: Choose', and '3rd choice: Choose'.

Or if you have the Assignment Preference field setup to not rank the applicant's choices, it will appear similar to this on the application form:



The screenshot shows a form section titled 'Assignment Preference'. Below the title is the instruction: 'The following volunteer assignments may currently be available. You may click the assignment names to learn more that assignment.' The form contains a list of assignments, each with a checkbox and a link: 'Assignment Preference:  [Cardiovascular Waiting Room \[Heart Center/Heart Center\]](#)', ' [CIMT Assistant \[Main Hospital/Rehabilitation\]](#)', ' [Clergy \[Main Hospital/Spiritual Care\]](#)', ' [Department Assistant \[Main Hospital/Administration\]](#)', ' [Diabetes Clinic Office Assistant \[Main Hospital/Community Education\]](#)', ' [Emergency Department \[Main Hospital/Emergency Department\]](#)', ' [Floor 3 Reception Desk \[Main Hospital/Reception\]](#)', ' [Floor 4 Reception Desk \[Main Hospital/Reception\]](#)', ' [Gift Shop Helper \[Main Hospital/Gift Shop\]](#)', ' [Gift Shop Manager \[Main Hospital/Gift Shop\]](#)', and ' [Greeters \[Main Hospital/Patient Escorts\]](#)'.



## What if I want to ask for Assignment preferences differently?

The Assignment Preference field can be customized to reflect a number of different options. For example, you can select how many preference choices volunteers can make, whether or not they should be ranked, and whether or not they can select from all Assignments, active Assignments only or Advertised Assignments only. You can tailor the way the Assignment Preference field works like this:

1. Choose [Setup \[pg:0887\]](#) from the main [menu \[pg:0215\]](#).
2. Select *Field Options*.
3. Select *Profile tab (for volunteers)*.
4. Select *Assignment Preference*.

This opens the Field Properties page for the Assignment Preference field, where you'll find several options for controlling which assignments are listed and how many choices applicants can select.

## How do I make a volunteer's Assignment preference become an actual Assignment Entry?

When a volunteer indicates an Assignment preference on their application, their [Service tab \[pg:0138\]](#) in Volgistics will show that they have the Assignment with the [Role \[pg:0103\]](#) of "Preference."

Assignment	Role	From	To		
Client Advocate [Headquarters\Client Services]	Preference	02-28-2008		<a href="#">Edit</a>	<a href="#">Delete</a>
Landscaping [East\Maintenance]	Preference	02-28-2008		<a href="#">Edit</a>	<a href="#">Delete</a>
Trail Management [East\Conservation]	Preference	02-28-2008		<a href="#">Edit</a>	<a href="#">Delete</a>

To change the volunteer's Role in an Assignment from "Preference" to "Assigned," locate the Assignment record on their [Service tab \[pg:0138\]](#) and click the orange Edit link next to the Assignment. Then, in the Edit box that appears, choose "Assigned" from the Role dropdown list, and click **Save**.

**Edit**

Assignment: Client Advocate [Headquarters \ Client Services]

Role: Preference

From: To:

Assigned  
Former  
Inactive  
Preference  
Referral  
Substitute  
Trainee

[Save](#) [Cancel](#)

**Matches**

Good  Marginal

[Refresh](#)

Alternatively, you can change a volunteer's Role in an Assignment from within the Assignment record, like this:

1. Choose Assignments from the [menu \[pg:0215\]](#).
2. Click on name of the Assignment.
3. Go to the Assignment's Volunteers tab. Use the Search options to pull up just the records with the Role of *Preference*. You can find assistance with this in [help topic 2221 \[pg:0131\]](#).
4. Use the dropdown list in the *New role* column to select *Assigned*.

Tag	Volunteer	Role	New role
<input type="checkbox"/>	<a href="#">Applebe, Tom</a>	Assigned	Assigned <input type="button" value="v"/> <a href="#">Delete</a>
<input type="checkbox"/>	<a href="#">Bennequin, Keshia</a>	Assigned	Assigned <input type="button" value="v"/> <a href="#">Delete</a>
<input type="checkbox"/>	<a href="#">Hill, Carl</a>	Preference	Preference <input type="button" value="v"/> <a href="#">Delete</a>
<input type="checkbox"/>	<a href="#">Howard, Jim</a>	Assigned	Assigned <input type="button" value="v"/> <a href="#">Delete</a>
<input type="checkbox"/>	<a href="#">Norris, Kathy</a>	Assigned	Former <input type="button" value="v"/> <a href="#">Delete</a>
<input type="checkbox"/>	<a href="#">Ross, Benjamin</a>	Assigned	Inactive <input type="button" value="v"/> <a href="#">Delete</a>
<input type="checkbox"/>	<a href="#">Wilson, Jenna</a>	Assigned	Preference <input type="button" value="v"/> <a href="#">Delete</a>
<input type="checkbox"/>			Referral <input type="button" value="v"/> <a href="#">Delete</a>
<input type="checkbox"/>			Substitute <input type="button" value="v"/> <a href="#">Delete</a>
<input type="checkbox"/>			Trainee <input type="button" value="v"/> <a href="#">Delete</a>

5. Repeat step 4 for any other volunteers you wish to assign to the Assignment.

### What is the difference between Assignment Preference and Schedule Preference fields?

While Assignment Preferences allow applicants to indicate the general kinds of service they would like to participate in at an organization, Schedule Preferences let volunteers choose their preference of specific schedule openings. You can read more about the distinction [here \[pg:0411\]](#).

## How to Upload Logo Graphics

Help topic 1187

Added or revised 07-14-2016

If your organization has a computer graphic file that contains your logo, you can upload it to Volgistics as the *print graphic* and/or *display graphic* for your account. You can optionally upload an image to be used for the VicNet mobile sessions.

There is not a limit on the dimensions (height and width) of the graphic file(s) used, but the actual file size must be under 48 KB. You may want to use separate images with different dimensions for the print, display and mobile graphics to make sure the most aesthetically pleasing choice is used for each. Volgistics does not have any built-in features that allow you to resize images, but most graphic or photo editing software programs or services have options to change a file's dimensions when it is saved. You may also wish to optimize the file when it is saved. This is particularly true for the mobile graphic. Optimizing the file reduces the amount of computer resources required to store the file, as well as the bandwidth required to transmit the file.

Graphic files can be uploaded on the *Logo graphics* setup page. If you're not already on this page, you can get there by:

1. Select [Setup \[pg:0887\]](#) from the menu.
2. Expand the *Online forms* link.
3. Select *Logo graphic*.

### **Print graphic (GIF, JPG or PNG)**

The graphic image you upload in the *Print graphic* section will be printed on selected reports. If you have already uploaded a print graphic, it will be displayed here.


You can choose to clear the graphic so that no image is printed on any reports by clicking the **Clear** button, or you can upload a new image to replace the current file.

Your *Print graphic* image can be a GIF, JPG or PNG file up to 48 kb in size and should have a white or transparent background.

To upload your print graphic:

1. Click the **Browse** or **Choose File** button.
2. Use the *File Upload* or *Upload file* window to locate the custom graphic file you want to load, click on the file name, and then click the **Open** button.
3. Click the **Upload** button at the bottom of the page. It may take a minute or two for your computer to upload the new file(s) so do not close your browser or go to another web page until you receive the upload confirmation.

Once a print graphic is successfully loaded into your Volgistics account, you can choose to display it on a report by customizing the *Logo & title locations* field on the report's [Page design \[pg:0451\]](#) tab.

		<b>All Service By Assignment</b> <small>Your Organization</small>		
Site	Place	Assignment	FY 09-10 Hours	Total Hours
Your Organization	Administration	Info Desk	176:22	176:22

### **Display graphic (GIF, JPG or PNG)**

The graphic image you upload in the *Display graphic* section will be displayed on the [Opportunity Directory \[pg:0420\]](#), online [application forms \[pg:0413\]](#), and at [VicNet \[pg:1724\]](#) and/or [VicTouch \[pg:1778\]](#). If you have already loaded a *Display graphic*, your current file will be visible here.

You can choose to clear the graphic so that no image is displayed on your online forms by clicking the **Clear** button, or you can upload a new image to replace the current file.

Your *Display graphic* image can be a GIF, JPG or PNG file up to 48 kb in size and should have a transparent or white background.

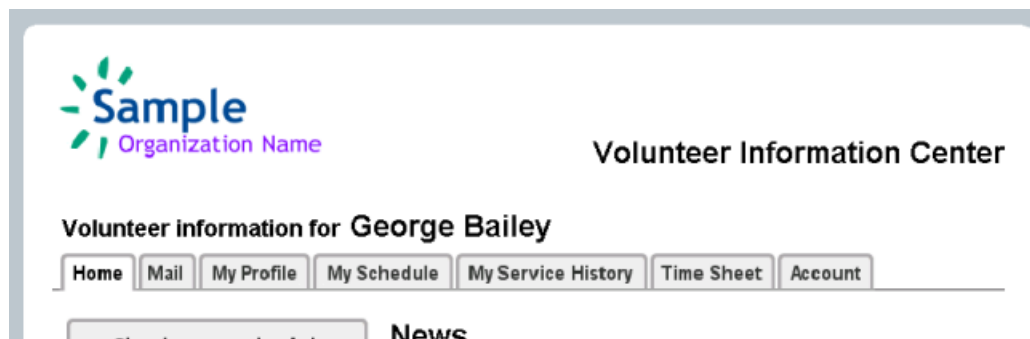
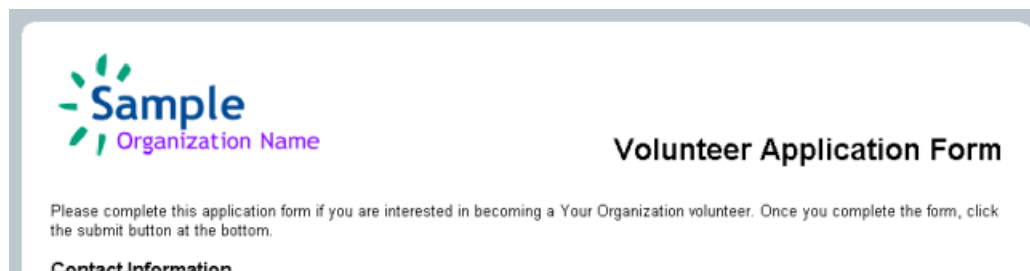
To upload your display graphic:

1. Click the **Browse** or **Choose File** button.
2. Use the *File Upload* or *Upload file* window to locate the custom graphic file you want to load, click on the file name, and then click the **Open** button.
3. Click the **Upload** button at the bottom of the page. It may take a minute or two for your computer to upload the new file(s) so do not close your browser or go to another web page until you receive the upload confirmation.

Once a

*Display graphic*

is successfully loaded into your Volgistics account, it will appear on your online forms. It will not appear at VicTouch until VicTouch has been **shut down** [pg:1762] and restarted.



### **Mobile VicNet logo (GIF, JPG or PNG)**

You will need to upload a separate image file if you want your organization's logo to appear on the mobile view of VicNet. You can find information on how to change other settings (such as the font and background colors) for the mobile view of VicNet in [help topic 1214](#) [pg:1934]. If you have already loaded a *Mobile VicNet logo*, your current file will be visible here.

You can choose to clear the graphic so that no image is displayed on the mobile view of VicNet by clicking the **Clear** button, or you can upload a new image to replace the current file.

Your volunteers and [Coordinators](#) [pg:0163] may pay for their data plans with their wireless carrier so you may want to resize your image with smaller dimensions and optimize the file when it is saved. Optimizing the file reduces the amount of computer resources required to store the file, as well as the bandwidth required to transmit the file. Most graphic or photo editing software programs or services have options to change a file's

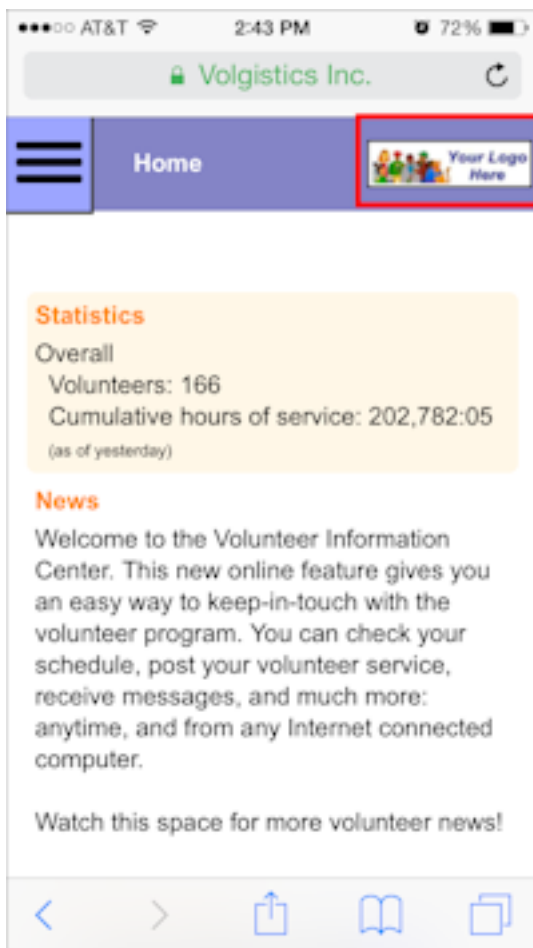
dimensions and to optimize the file when it is saved.

Your *Mobile VicNet logo* image can be a GIF, JPG or PNG file up to 48 kb in size and should have a transparent or white background. The PNG file type is the recommended format.

To upload your mobile VicNet logo graphic:

1. Click the **Browse** or **Choose File** button.
2. Use the *File Upload* or *Upload file* window to locate the custom graphic file you want to load, click on the file name, and then click the **Open** button.
3. Click the **Upload** button at the bottom of the page. It may take a minute or two for your computer to upload the new file(s) so do not close your browser or go to another web page until you receive the upload confirmation.

Once a *Mobile VicNet logo* graphic is successfully loaded into your Volgistics account, it will appear in the top right corner of the VicNet page when the user selects to use VicNet in the mobile format.



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## How do I disable an online application form?

Help topic 1191

Added or revised 09-30-2016

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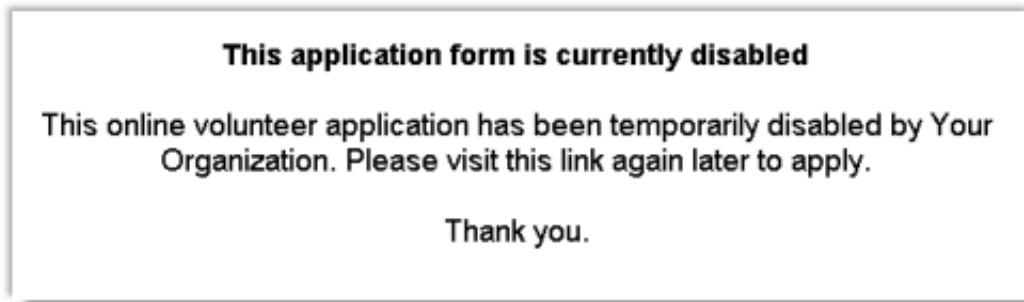
There may be times when you would like to temporarily disable an [online volunteer application form \[pg:0413\]](#) without permanently removing the link to the application form from your organization's web site. When you disable an online volunteer application form, visitors who click your link to that form will receive a message explaining that application form is temporarily unavailable. They will not be able to submit applications while it is disabled.

To disable an online volunteer application form:

1. Choose Setup from the [menu \[pg:0215\]](#).
2. Select "Online forms."
3. Click "Volunteer application forms."
4. Click on the name of the application form you want to disable.
5. On the form setup page under the **Links** heading, check "Temporarily disable links to this form."
6. Click the **Save** button.

When you are ready to return the application form to service, repeat these steps, un-checking the "Temporarily disable links to this form" checkbox.

While an application form is disabled, a visitor who clicks your web site's link to the application form will see the following message by default:



You can optionally customize this message on the [Online forms ground rules \[pg:1330\]](#) page.

### Removing an application form permanently

If you would like to permanently remove an online volunteer application form that you have linked to from your organization's web site, you should ask the person who maintains your web site to remove the form's link from your own web site.

## Related help

- [Help Topic 1053 \[pg:1334\]](#) - Application Form Setup Page
- [Help Topic 2121 \[pg:0413\]](#) - Using Online Volunteer Application Forms
- [Help Topic 2122 \[pg:1361\]](#) - How to Set Up a Volunteer Application Form
- [Help Topic 2125 \[pg:1362\]](#) - Creating Links to Your Volunteer Application Form
- [Help Topic 2128 \[pg:0420\]](#) - Volunteer Policy, Confidentiality and Release Agreements
- [Help Topic 2129 \[pg:1365\]](#) - Online Form Security and Privacy Policies
- [Help Topic 2131 \[pg:1367\]](#) - How to Clone a Volunteer Application Form
- [Help Topic 2552 \[pg:1373\]](#) - How to Print, View, or Save a Completed Application Form

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## How can I collect a volunteer's affiliation information?

Help topic 2070

Added or revised 01-03-2012

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**Q.** My organization is interested in asking applicants if they are affiliated with certain groups when they complete the online application form. How can we do this and where will this information appear in their record?

**A.** You can create a *characteristics* field called 'Affiliations' and place this field on your application form. This would give applicants a checkbox for each group for which you want to track volunteer affiliations. You will see what affiliations a volunteer has on the Profile tab in their record.

Start by adding a new *characteristics* field:

1. Choose Setup from the [menu \[pg:0215\]](#).
2. Choose 'Field Options.'
3. Choose 'Profile tab (for volunteers).'
4. Click the 'Add a new characteristic' link. This opens the Field Properties page shown below.
5. On the Field Properties page, enter a name for this field after 'Characteristic name.' This is the field name that will appear on the application form, and on the Profile tab in your volunteer records. 'Affiliations' would be a good field name in this case.
6. Use the 'Add a new item' field to enter the names of each of the groups for which you want to track volunteer affiliations. Click the **Save** button after you enter each group name. You can always return to this page to add more items to this field if you need to.
7. When you're finished adding the item names, click the Save button.

The Field Properties page will look something like this when you're finished:

**Field Properties** Save Delete Cancel

**Affiliations**

Field location: **Profile tab**

Type of field: **Characteristic**

Characteristic name:

You can choose:

Use this for...

- Use this characteristic for matching volunteers and assignments. This characteristic appears on the Profile tab for both volunteers and assignments.
- Track this characteristic for volunteers only. This characteristic appears on the Profile tab for volunteers only.
- Track this characteristic for assignments only. This characteristic appears on the Profile tab for assignments only.

**Items**

Add a new item:  Save

<input type="text" value="A church or religious group"/>	<span>Delete</span>	<span>Merge</span>
<input type="text" value="AARP"/>	<span>Delete</span>	<span>Merge</span>
<input type="text" value="Junior League"/>	<span>Delete</span>	<span>Merge</span>
<input type="text" value="Kiwanis Club"/>	<span>Delete</span>	<span>Merge</span>
<input type="text" value="PTA (your local PTA)"/>	<span>Delete</span>	<span>Merge</span>
<input type="text" value="Rotary International"/>	<span>Delete</span>	<span>Merge</span>

**System operator rights**

Volgistics Administrators:

Power users:

Basic users:

Save Delete Cancel

Now you're ready to add the new *Affiliations* field to your online volunteer application form. To do this:

1. Choose Setup from the [menu \[pg:0215\]](#).
2. Choose 'Online forms.'
3. Choose 'Volunteer application forms.'
4. Click on the name of the application form you want to add the new *Affiliations* field to. This opens the application form setup page.
5. We will add a new form section for the Affiliation field, so click the 'Form sections' link on the application form setup page.
6. On the Forms Section page, locate the next available form section. Enter the heading you want to appear at the beginning of this form section (e.g. 'Affiliations'), enter any instructions you would like to appear under the section, and then click the **Save** button.



The Forms Section page will include a section definition similar to this when you're finished:

information, and receive messages. Please select the [dropdown]

**10** Enter a heading for this section, or leave the heading blank to skip this section:  
Affiliations

Enter the instructions you want to appear at the top of this section:  
Are you currently affiliated with any of the following groups? Check all that you are currently affiliated with.

**11** Enter a heading for this section, or leave the heading blank to skip this section:

7. From the application form setup page, click the 'Fields' link. This opens the Fields page.

8. On the Fields page, locate the *Affiliations* field, use the drop down list next to the *Affiliation* field to choose the form section you just added, and then click the **Save** button.

HOURS: Omit [dropdown] [checkbox]

Skills: Skills & Experience [dropdown] [checkbox]

**Affiliations:** Affiliations [dropdown] [checkbox]

Assignment Preference: Assignment Preference [dropdown] [checkbox]

Your online application form now includes the *Affiliation* field. This is an example of how this would appear to applicants on your application form.

Confirm password: [input]

**Affiliations**  
Are you currently affiliated with any of the following groups? Check all that you are currently affiliated with.

Affiliations:  A church or religious group  AARP  Junior League  
 Kiwanis Club  PTA (your local PTA)  Rotary International

**I Agree**  
I understand and agree that submitting this application form does not automatically register me as a Sample Agency Name

The new *Affiliation* field will also now appear on the Profile tab in each volunteer's record in box similar to the one shown here.

**Affiliations**

A church or religious group  AARP  Junior League  
 Kiwanis Club  PTA (your local PTA)  Rotary International

This is where you will see what groups an applicant said they are affiliated with. You can add or edit a volunteer's affiliations here too.

You can also now include the volunteer *Affiliation* field on printed reports. For example, you can add the *Affiliation* field to any [Volunteer List \[pg:0692\]](#) or Volunteer Profile report you create. You can also create [Sets \[pg:0858\]](#) that will find all of the volunteers who have a specific group selected in the *Affiliation* field.

### Related help

[Help Topic 2017 \[pg:0957\]](#) Field Setup

[Help Topic 2121 \[pg:0413\]](#) Using online volunteer application forms

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## How to Set Up a Volunteer Application Form

Help topic 2122

Added or revised 01-18-2017

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There are different options you can use to get started with setting up an application form. No matter which option you choose to use, you will need to get started by:

1. Choose [Setup \[pg:0887\]](#) from the [menu \[pg:0215\]](#).
2. Select *Online forms*.
3. Select *Volunteer application forms*:
4. From here, you have the following options to setup a form:
  - (1) Select *Create a new application form* to start a new form from scratch.
  - (2) Select *Clone a form* to spin off a copy of a default form or an existing form. You can learn more about this [here \[pg:1367\]](#).
  - (3) Select one of the default forms (*Detailed form* or *Short form*), or an existing form, to review or modify that form.

### Volunteer application forms

Click 'Create a new application form' to create a new online application form, or 'Clone a form' to make a new form that is based on an existing form. Click on the name of an existing form to review or edit the form.

[Create a new application form](#) **1**

[Clone a form](#) **2**

[Detailed form](#) (0 submissions)

[Great Lakes Form \(Adults\)](#) (54 submissions)

[Great Lakes Form \(Youth\)](#) (0 submissions)

[Short form](#) (0 submissions)

[Summer Festival 2015](#) (2 submissions)

**3**

5. Use the form's Setup page to control how the form will work. [Help topic 1053 \[pg:1334\]](#) has a detailed explanation of the settings on this page.

## Previewing application forms

As you setup or modify a volunteer application form, it's often helpful to preview the form and see how it will look to online visitors. To preview the volunteer application form you're working on, scroll down the Setup window to the

### Links

section and click one of the buttons to preview the form. You can preview the form in full-page view or in an embedded format. You can learn more about the differences in these two views in [help topic 2252 \[pg:0208\]](#).

You can also submit a test application form when you preview a form if you wish. When you preview the form, just fill in the fields and then click the

### Continue

button to submit the form. You can learn how to receive an application form that is not setup to bypass auditing in [help topic 2123 \[pg:0415\]](#).

## Changing form colors and fonts

Volgistics lets you control many graphic characteristics of your online forms, such as background colors, font names, and sizes. Choosing graphic characteristics for your forms that match the style of your own web site gives your site a unified appearance, and lets you "brand" your online forms as your own. Use the [Online Forms Ground rules \[pg:1330\]](#) and [Logo graphic setup \[pg:1353\]](#) options to customize the graphic look of your forms.

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# Creating Links to Your Volunteer Application Form

Help topic 2125

Added or revised 08-10-2015

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Potential volunteers can get to your [online volunteer application form \[pg:0413\]](#) from links you place on your own web site.

You create one or more links to your volunteer application form from your own web site. This makes it easy for prospective volunteers to go right to your form while they're visiting your site, and it's the place people would logically go online to if they're interested in your organization and they're looking for a way to get involved.

### Linking from your own web site

Incorporating a link to your online volunteer application form is as simple as adding the following hyperlink to the HTML (Hyper Text Markup Language) markup for your site:

```
<A HREF="https://www.volgistics.com/ex/portal.dll/ap?AP={form number}">Volunteer application form</A>
```

Replace {form number} with the form number for *your* volunteer application form. This is an example of a completed link to an application form with the hypothetical form number "1234567890":

```
<A HREF="https://www.volgistics.com/ex/portal.dll/ap?AP=1234567890">Volunteer application form</A>
```

To get the form number for *your* application form:

1. From the [menu \[pg:0215\]](#), choose Setup.
2. Select 'Online forms.'
3. Select 'Volunteer application forms.'
4. Click the name of the application form you want to link.
5. Scroll down to the *Links* section. The *Links* section shows you the form number, as well as examples of links. You can copy and paste the link from this Volgistics setup page into your HTML document, or you can type the link into your HTML document manually.

If you maintain your own web site then you're probably familiar with HTML and hyperlinks. If someone else maintains your web site, consider printing a copy of this help topic for them to follow as they install your link (be sure to give them *your* application form number, too).

Instruction(s) on how to work with HTML is beyond the scope of this topic. However you should know that there are several different ways you can incorporate your application forms into your web site. Each method has pros and cons, discussed briefly in this section. Choose the method you feel will most closely integrate the form into your web site. You can...

- open the form in the same browser window or frame
- open the form in a new browser window
- open the form as an inline frame

#### Opening the form in the same browser window or frame

This is the simplest and most common kind of hyperlink. It's advantages include not opening a new browser window, and giving your form a more integrated look. This is an example of an HTML link with the text "Volunteer Application Form." When a visitor clicks the link they see your application form:

```
<A HREF="https://www.volgistics.com/ex/portal.dll/ap?AP={form number}">Volunteer application form</A>
```

If your web site does not use *frames*, the visitor to your form will see just the application form in their browser window when they click the link. When you create a link to your application form from a web site that does not use frames, and if you don't open the form in a new browser window, then you should include a 'back link' on the application form so that visitors can easily continue browsing your organization's web site after they submit the form.

To include a back link to your web site:

1. From the [menu \[pg:0215\]](#), select 'Setup.'
2. Choose 'Online forms.'
3. Click 'Volunteer application forms.'
4. Select your application form from the 'Volunteer Application Forms' window.
5. Click the 'Receipt confirmation link.'

6. In the 'Return navigation section,' select 'Include the following link back to a page in your own web site,' and then enter the text and [url \[pg:1349\]](#) for your back link.

7. Click the **Save** button.

An ideal approach to opening the application form on your own web site uses *frames*. With this approach, the organization's logo and navigational links can appear in one frame, while the various pages the visitor selects appear in an adjacent frame. This ensures that visitors to the site will always see the Site's menu no matter what page they're on. When the form link shown above is made from within a frame, visitors can still see your site's menu even after they click the application form link. You can use this approach to give your online volunteer application forms a totally integrated look.

If you place your volunteer application form link within a frame, you need not include a 'back link' or 'Close this window' button on your form, since visitors can easily continue browsing your site after they submit their application using the menu or navigational links you provide in another frame.

#### Opening the form in a new browser window

A different approach to links is making the linked form open in a new, separate browser window on the visitor's computer.

The advantage to this approach is that visitors return to the same web page they were on when they clicked the application form link after they submit their form and close the form's browser window. Some developers avoid opening new browser windows because they may confuse novice web visitors.

This is an example of an HTML hyperlink that opens the application form in a new browser window:

```
<A HREF="https://www.volgistics.com/ex/portal.dll/ap?AP={form number}"  
TARGET="NEW">Volunteer Application Form</A>
```

If you use this approach to your application form link, it's a good idea to include a 'Close this window' button on the application form. This makes it easier for visitors to exit the new browser window after they submit their form.

To include a 'Close this window' button on your form:

1. From the [menu \[pg:0215\]](#), select 'Setup.'
2. Choose 'Online forms.'
3. Click 'Volunteer application forms.'
4. Select your application form from the 'Volunteer Application Forms' window.
5. Click the 'Receipt confirmation link.'
6. In the [Return navigation section \[pg:1349\]](#), select 'Include a 'Close this window' button on the confirmation window.'
7. Click the **Save** button.

## Opening the form in an in-line frame

*In-line framing* (also called "floating frames") is a method of embedding one HTML document inside the framework of another HTML document. An in-line frame is similar to the HTML IMG tag, except that an HTML page is inserted at the tag location rather than an image.

This is an example of an HTML tag for including the application form within the body of another web page:

```
<IFRAME SRC="https://www.volgistics.com/ex/portal.dll/ap?AP={form number}">  
This page requires a browser that can display frames</IFRAME>
```

The advantage of this method is your ability to display the form within a web page that includes other elements you choose, such as a background image or custom graphics or links you want to appear along with the form. A disadvantage is that some older browsers do not support the IFRAME tag (Hint: install a conventional link to the application form within the <IFRAME> and </IFRAME> tags to give visitors who use older browsers access to the form in a new browser window).

If you use this approach and you would like a background image to appear behind the form, choose a transparent background color for your online forms in Volgistics.

To make your online forms transparent:

1. From the [menu \[pg:0215\]](#), select 'Setup.'
2. Choose 'Online forms.'
3. Click 'Ground rules.'
4. Clear any color entry that currently appears for the background color in the 'Background' section so the Background color field is completely blank.
5. Click the **Save** button.

When creating web pages that include an iframe, be sure to use a DOCTYPE that supports Iframes for your web page.

---

## Online Form Security and Privacy Policies

Help topic 2129

Added or revised 01-07-2015

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As you develop and implement online tools for volunteers, such as [online volunteer application forms \[pg:0413\]](#), consider people's concerns about the security and privacy of the information they submit on line. It's reasonable for visitors to your web site to expect some assurance that their information will be protected.

Organizations that have web sites may already have established privacy policies posted on their sites. These may cover volunteer information collected online. Others may need to develop such policies from scratch. As you prepare to post online forms through Volgistics, you should determine where you stand. Does your site already have a posted policy? Does it cover volunteer information? Will people visiting your site to fill-out an application form already see a link to this policy?

If the answer to any of these questions is 'no,' this help topic offers some basic guidance on how to proceed.

## Providing privacy information on online forms

You can optionally include a privacy policy statement on the [online forms you add to your web site \[pg:0208\]](#). When a visitor to your online forms clicks a 'privacy policy' link, they will see your privacy information.

To install a privacy policy:

1. From the [menu \[pg:0215\]](#), select 'Setup.'
2. Click 'Online forms.'
3. Click 'Ground rules' and then scroll down to the 'Privacy policy' section.
4. Click the 'Include a link to this privacy policy statement' checkbox.
5. Enter your privacy policy in the space provided, or copy and paste the statement into this space from a word processing program or other source.
6. Click the **Save** button.

Your online forms will now include a 'privacy policy' links to your privacy policy statement.

## Developing security and privacy policies

Be sure your organization doesn't already have a policy before you start developing one. If your organization has a 'webmaster,' this may be something they've completed or are involved with. Also recognize that this is the sort of policy that your supervisor or a legal advisor may need to be involved with. Be sure you've checked with the right people before posting your policy!

There are generally two concerns that people have about providing information through online forms. First is that their personal information will be secure as it travels over the Internet: that it will reach you without being intercepted by anyone along the way. Second is that you will respect the privacy of their information once you receive it and only use it for certain purposes.

The first concern is something Volgistics can help you address, because the Volgistics system handles the transfer of information over the Internet. The second concern is something your organization must address, since you are the actual user of the information people provide to you.

### Security policies

Volgistics protects the information volunteers (or prospective volunteers) submit through online forms with the same high level of security used to protect your interactions with Volgistics. This includes the use of Secure Sockets Layer (SSL) technology for protecting information as it travels over the Internet, firewalls, secure servers, database encryption, and other security measures.

The following sample wording describes security measures used by Volgistics. You can incorporate this wording in your own security and privacy information to describe the security of the online form provided by Volgistics.

The information you submit through this online form is protected using Secure Sockets Layer (SSL) technology. This means that your information is encrypted as it travels between your computer and our volunteer database. This is the same technology used by banks to protect online banking services and online merchants to protect credit card information. Once your data reaches our volunteer database, it is protected by hardware firewalls, secure servers, database encryption, and other security measures.

Of course you're welcome to tailor your own security information, however you must be careful not to offer any security assurances that are not provided by the Volgistics service.

### Privacy policies

Individual organizations that collect volunteer information through online volunteer application forms should offer applicants an explanation of what information they collect, and how they will use it. This is often called a 'Privacy Policy.'

Different organizations use volunteer information in different ways. Therefore, your privacy policy is something you should tailor to the way your own organization uses volunteer data.

An excellent resource for guidance on how to develop a privacy policy is Truste (www.truste.com), an online service dedicated to internet privacy.

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## How to Clone a Volunteer Application Form

Help topic 2131

Added or revised 10-05-2016

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There may be times when you want to create an application form that is very similar to one you have already created. For example, you may have already created a form for adult volunteers and now you want to create a new form for youth volunteers. The youth form will have many of the same settings for which fields are selected and how the form functions, but will have a few differences. In this case, the easiest way to make the new youth form will be to clone the existing adult form. Here is how you can do this:

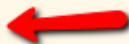
1. Select [Setup \[pg:0887\]](#) from the menu.
2. Expand the *Online forms* link.
3. Select *Volunteer application forms*.
4. Select *Clone a form*.

### **Volunteer application forms**

Click 'Create a new application form' to create a new online application form, or 'Clone a form' to make a new form that is based on an existing form. Click on the name of an existing form to review or edit the form.

[Create a new application form](#)

[Clone a form](#)



[Print a blank form](#)

[Detailed form](#) (0 submissions)

[Great Lakes Form \(Adults\)](#) (56 submissions)



5. Select the existing form you want the new form to be based on from the *Form* dropdown list and then enter a name for your new form in the *New Form Name* field.

Please choose a form which you want to clone.

Form:

New Form Name:

6. Click the **Submit** button.

7. Select the name you gave the new form from the list if you need to modify the form's setup. You can find information on how to do this [here \[pg:1334\]](#).

**Please note:** If a new name for the form was not selected in step 5, the new form's name will be the same as the old form's name except that a number will be appended to the end of the title. For example, if the form cloned was named "Great Lakes Form (Adult)" and a new name was not entered when the **Submit** button was clicked, the new form will be called "Great Lakes Form (Adult) 2"

---

## Opportunity Directory Setup Page

Help topic 2251

Added or revised 05-21-2012

---

You can use the [opportunity directory \[pg:0420\]](#) feature to add information about your volunteer opportunities to your own web site. The Opportunity Directory setup page is where you customize certain characteristics of your Opportunity Directory. If you're not already on the Opportunity Directory setup page you can get there by choosing [Setup \[pg:0887\]](#) from the [menu \[pg:0215\]](#), selecting 'Online forms,' and then clicking the 'Opportunity directory' link.

### Appearance

You can create links to your opportunity directory in either of two modes: 'Full-page' mode or 'Embedded' mode. The controls in this section affect the way your directory appears in either mode.

#### List assignments...

This setting controls the way the list of advertised assignments is organized.

- As a plain alphabetical list

Select this option if you want the directory to list your advertised assignments in a single alphabetical list no matter which Site or Place the assignment is from. Visitors click any assignment name to learn more about that assignment.

Example:

- Book Cart**
- Client Advocate**
- Client Intake**
- Docent**
- Festival**
- Information Desk**
- Instructor**
- Phones**
- Records**
- Speakers Bureau**
- Special Events**
- Transportation Driver**

- By Site and Place

Select this option if you want the directory to list advertised assignments according to their Site and Place. Each Site and Place in your database that has one or more advertised assignments is listed, followed by the advertised assignments for each Place. Visitors click any assignment name to learn more about that assignment.

Example:

## **Downtown Region**

### **Administration**

- Client Intake
- Information Desk
- Records

### **Client Services**

- Book Cart
- Client Advocate
- Transportation  
Driver

### **Volunteer Office**

- Phones
- Speakers Bureau
- Special Events

## **Northeast Region**

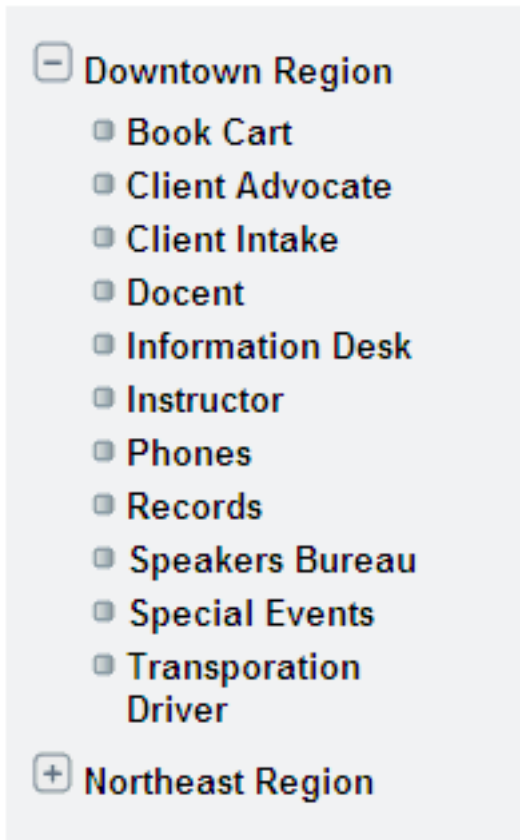
### **Volunteer Services**

- Festival

- By Site in an expandable format

Select this option if you want the directory to list advertised assignments according to their Site. Each Site in your database that has one or more advertised assignments is listed. Visitors click any Site name expand the list of advertised assignments for that Site.

Example:



Draw border around assignment profiles

Check this checkbox if you want assignment profiles to appear with a rounded border, as shown here:



Bullets next to assignment names

Check this checkbox if you want bullets next to each assignment name. Un-checking this checkbox causes assignment names to appear without these bullets.

Page instructions

The first time a visitor to your web site views the opportunity directory, instructions appear on the right side of the directory asking the visitor to click any assignment name to learn more about that assignment. You can customize these instructions here.

These instructions are replaced by an assignment profile as soon as the visitor clicks an assignment name.

### Assignment information

Check each of the fields of assignment information you want to appear in your directory. When a visitor clicks an assignment name link, this is the information they will see for the selected assignments.

Your field selections here apply to all of your advertised assignments.

Warning for organizations that use the VicNet module and choose to include links for more information about assignments on the 'My Schedule' [pg:1453] tab:

These settings also control what volunteers see when they click the 'Job Description' link. If no fields are selected under 'Assignment information' for the Opportunity Directory, no information will be shown when volunteers click on the 'Job Description' link. So any fields you want volunteers to see for an assignment when the 'Job Description' link is clicked must be selected here.

### **Full-page appearance**

You can create links to your opportunity director in either of two modes: 'Full-page' mode or 'Embedded' mode. The controls in this section apply only to forms displayed using the Full-page mode.

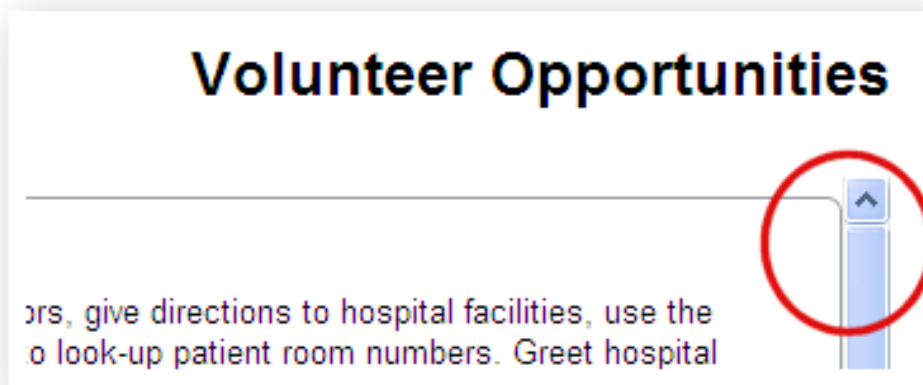
### Heading

Enter the text heading you would like to appear at the top of the opportunity directory. For example 'Volunteer Opportunities.'

### Panel height

Enter a height for the form panel in pixels. The default height is 600 pixels. You may make the panel taller if you wish.

If you find that your list of volunteer opportunities or your assignment profiles appear with scroll bars as shown below, you can eliminate the scroll bars by increasing the panel height.



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## How to Print, View or Save a Completed Application Form


Help topic 2552

Added or revised 10-14-2015

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The [online volunteer application forms \[pg:0413\]](#) in Volgistics allow you to collect information from prospective volunteers and have the information they enter on the form automatically transfer to a volunteer record in your account. This is a great way to streamline the application process because you will not need to manually enter the volunteer's information into your account.

You may want to print, view or save a file of the completed application form a volunteer submits. After the release of Phase 2 of the VicDocs feature, Volgistics automatically creates a [PDF \[pg:0449\]](#) file showing the applicant's selections on the form.

 **Your Agency Individual Application**

Please complete this application form if you are interested in becoming a Your Agency Name volunteer. Once you complete the form, click the Continue button at the bottom.

Contact Information

First name: John  
Last name: Holiday  
Middle name: Henry  
Title: Dr.  
Nickname: Doc  
Street 1: Bennett Avenue  
City: Glenwood Springs  
State: CO  
Zip: 81601  
Home phone: 814-1851  
Work phone: 118-1887

Skills & Experience

In which of these areas do you feel you have moderate to excellent skill? Check all that apply.

Skills & Interests:  Cash Register  Data Entry  Office Work  
 Patient Assistance  Patient Companionship

Please list any other special skills or interests.

Emergency Contact

In the event of an emergency, whom should we notify?

If you need the completed application form for a volunteer record created from an application submitted after Phase 2 of the VicDocs feature was released, see the After VicDocs Released section below. If you need the completed form for a volunteer record made prior to the release of Phase 2, see the Before VicDocs Released section below.

### After VicDocs Released

If your application forms are setup to be audited, you will need to [receive the applicant's information \[pg:0415\]](#) before proceeding. After the record is in your database, you can find it using the options shown in [help topic 2023 \[pg:1982\]](#). Once you have found the record, click on the Docs tab, which is the last tab on the right hand side the record.

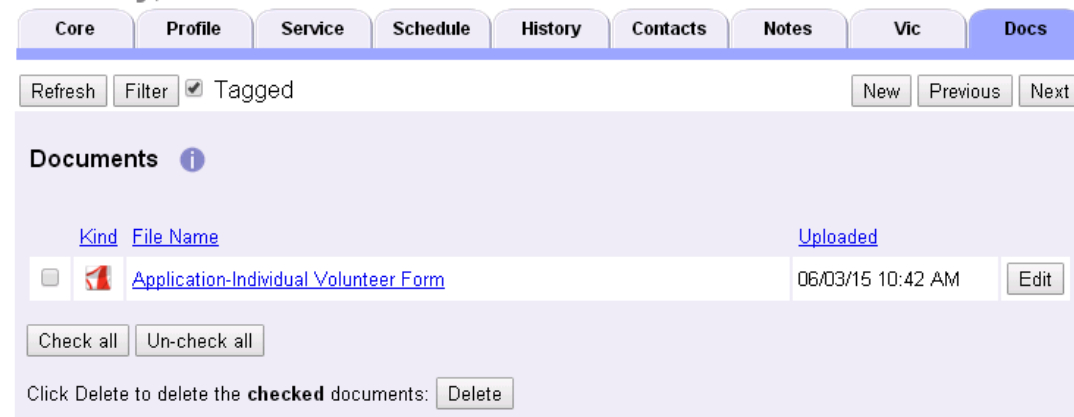
### Holliday, John



If you are not able to see the tab, your [System Operator \[pg:0065\]](#) rights do not allow access to the tab. You will need to contact your account's [Administrator \[pg:0052\]](#) for further assistance if you need to use the Docs tab and it does not show when you view a volunteer's record.

To view, print or save the application form, select the form in the *File Name* column.

### Holliday, John



What you see next will depend on the web browser you are using and its settings.



- If your web browser uses a built-in PDF viewer, your web browser may open another window to display your document. In this case, you will need to use the viewer's tools to save or print the file. If the form tries to load but never opens, you may need to disable the built-in viewer. You can find more information on this [help topic 2176 \[pg:1606\]](#).
- If your web browser is setup to download or save PDF files, you will need to go to the location the file was downloaded or saved to. Once you locate the file, you can open it from the saved location in order to print your form.



## Before VicDocs Released

There is not a way to view, print or save a completed application form for records created prior to the release of Phase 2 of the VicDocs feature. If you need a hard copy of the application form for these records, one option is to print a Volunteer Profile report that has the same fields of information that the application form has. The [Fields tab \[pg:0697\]](#) of the Volunteer Profile report has text fields that can be used to copy statements such as photo or liability waivers, and create signature fields if you will need a signed copy.

Here is how to create a Volunteer Profile report for this:

1. Choose Print from the [menu \[pg:0215\]](#).
2. Expand the *Volunteer Profile* link.
3. Select *Create a new volunteer profile report*.
4. On the Options tab, select the options for sorting the report.
5. On the Fields tab, select the fields that you want to appear on the report.
6. On the Include tab, select which volunteers you want on the report. If you are running the report for a specific volunteer, use the [Tags \[pg:1529\]](#) feature as shown in [help topic 2322 \[pg:0471\]](#).
7. On the Save tab, give the report a unique name so you can find it again. Click the **Save and Print** button when you're ready to start the report. When the Include tab appears again, click the **Start printing** button.

The report will be placed on the [In Box \[pg:0303\]](#) tab of your Volgistics Mailbox after it has been compiled by the servers.

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## How to Print a Blank Volunteer Application Form

Help topic 2554

Added or revised 08-11-2015

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The [online volunteer application forms \[pg:0413\]](#) in Volgistics allow you to collect information from prospective volunteers and have the information they enter on the form automatically transfer to a volunteer record in your account. This is a great way to streamline the application process because you will not need to manually enter the volunteer's information into your account.

However, there may be times when you need a paper application for prospective volunteers to fill out. For example, if the prospective volunteer does not have access to the Internet, or you are going to a volunteer fair where you want to hand out applications. In these cases, you can print a paper copy of your online application form.

Once the form is completed, a [System Operator \[pg:0065\]](#) for your account will need to [manually enter \[pg:1877\]](#) the applicant's information into your account if you want to track the volunteer using Volgistics.





Here is how you can print a blank copy of your application form.

1. Select [Setup \[pg:0887\]](#) from the menu.
2. Expand the *Online forms* link.
3. Select *Volunteer application forms*.
4. Select *Print a blank form*.

### Volunteer application forms

Click 'Create a new application form' to create a new online application form, or 'Clone a form' to make a new form that is based on an existing form. Click on the name of an existing form to review or edit the form.

[Create a new application form](#)

[Clone a form](#)

[Print a blank form](#) 

[Detailed form](#) (0 submissions)

[Great Lakes Form \(Adults\)](#) (56 submissions)

5. Select the name of the form you want to print a copy of from the dropdown list.
6. Click the **Submit** button.

At this point, the Volgistics system has created a PDF file for your blank application form. You may see different things depending on the web browser you're using and its settings.



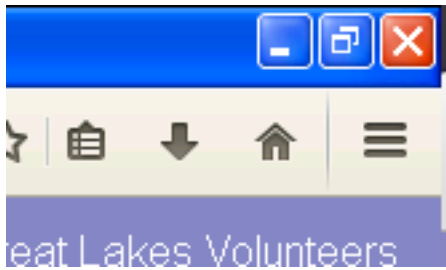
- If your web browser uses a built-in PDF viewer, your form will display in the entire window. In this case, you
- will need to use the viewer's tools to save or print the file. When you are done working with the PDF file,
- select another item from the [menu \[pg:0215\]](#) to continue working in Volgistics.

**Please note:**

There are some instances where built-in PDF viewers do not pull up the PDF file. If you just get a page loading icon and the page never loads, you will need to disable the PDF viewer in your web browser. You can find

directions on how to do this in [help topic 2176 \[pg:1606\]](#).

- If your web browser is setup to download or save PDF files, you will need to go to the location the file was downloaded or saved to. Once you locate the file, you can open it from the saved location in order to print your blank form.



### Related help

- [Help Topic 1053 \[pg:1334\]](#) - Application Form Setup Page
- [Help Topic 1054 \[pg:1338\]](#) - Site Selection
- [Help Topic 1055 \[pg:1340\]](#) - Form Sections
- [Help Topic 1056 \[pg:1341\]](#) - Volunteer Application Form Fields
- [Help Topic 1057 \[pg:1343\]](#) - Schedule Fields
- [Help Topic 1058 \[pg:1345\]](#) - Comment Fields
- [Help Topic 1059 \[pg:1346\]](#) - Contact Fields on Application Forms
- [Help Topic 1060 \[pg:1348\]](#) - I Agree Section
- [Help Topic 1061 \[pg:1349\]](#) - Receipt Confirmation
- [Help Topic 1165 \[pg:1351\]](#) - How do I collect Assignment Preferences on an application form?
- [Help Topic 1186 \[pg:0411\]](#) - Schedule Preferences versus Assignment Preferences
- [Help Topic 1187 \[pg:1353\]](#) - How to Upload Logo Graphics
- [Help Topic 1191 \[pg:1357\]](#) - How do I disable an online application form?
- [Help Topic 2055 \[pg:0967\]](#) - How do I make only certain Assignments appear under Assignment Preferences?
- [Help Topic 2121 \[pg:0413\]](#) - Using Online Volunteer Application Forms
- [Help Topic 2122 \[pg:1361\]](#) - How to Set Up a Volunteer Application Form
- [Help Topic 2123 \[pg:0415\]](#) - Processing Online Volunteer Applications
- [Help Topic 2124 \[pg:0418\]](#) - Where the Information from Application Forms Goes
- [Help Topic 2125 \[pg:1362\]](#) - Creating Links to Your Volunteer Application Form
- [Help Topic 2127 \[pg:0419\]](#) - Site Level Access and Online Volunteer Application Forms
- [Help Topic 2128 \[pg:0420\]](#) - Volunteer Policy, Confidentiality and Release Agreements
- [Help Topic 2129 \[pg:1365\]](#) - Online Form Security and Privacy Policies
- [Help Topic 2130 \[pg:1011\]](#) - Preference Fields
- [Help Topic 2131 \[pg:1367\]](#) - How to Clone a Volunteer Application Form
- [Help Topic 2552 \[pg:1373\]](#) - How to Print, View, or Save a Completed Application Form

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## Setup Birthday Lists

Help topic 1067

Added or revised 02-22-2009

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You use the Birthday List page to setup the Volgistics [birthday list \[pg:1385\]](#) features.

To get to the Birthday List page:

1. From the [menu \[pg:0215\]](#), choose 'Setup.'
2. Click 'Other options,' and then click 'Birthday lists.'

The Birthday List page has these birthday list setup options:

### Use birthday lists

Check this checkbox if you want to use any of the Volgistics birthday list features. When you select this option, you can optionally include volunteer birthday lists on the Welcome page in Volgistics for selected Volgistics system operators. If you do not select this option, the system never displays birthday lists on the Welcome page in Volgistics.

### Update the birthday list...

Choose the frequency at which you want Volgistics to update the birthday list. Volgistics automatically updates the birthday list overnight at the frequency you choose here.

When you choose *monthly*, Volgistics generates a new birthday list on the first day of every month. The list will include all volunteers you want to appear on birthday lists, who have a birthday in the current month. This usually results in the longest birthday lists.

Choose *weekly* if you want Volgistics to generate a new birthday list every Sunday. The list will include all volunteers you want to appear on birthday lists who have a birthday in the current week (Sunday through Saturday).

Choose *daily* if you want Volgistics to generate a new birthday list every day. The list will include all volunteers you want to appear on birthday lists who have a birthday on the current day. This usually results in the shortest birthday lists.

### Include volunteers in the list if their Status is any of these...

Use this option to specify the kinds of volunteers you want to appear on birthday lists, based on their volunteer *Status*. Check each volunteer Status you want to include. If you want to exclude volunteers who are inactive, for example, do not check the 'inactive' Status.

### Include volunteers on the list no matter what their Type is...

Include volunteers on the list only if their Type is one of these...

Volunteer *Type* is another field you can use to control the kinds of volunteers that appear on birthday lists. The volunteer Type field appears in the Name box on the Core tab for each volunteer, and it is usually used to identify broad categories of volunteers, such as 'Adult,' 'Junior,' 'Student,' 'Community,' and so forth.

Choose "Include volunteers on the list no matter what their Type is..." if you do not want to use the Type field to limit the kinds of volunteers that will appear on birthday lists.

If you do want birthday lists to only include volunteers of certain Types, choose "Include volunteers on the list only if their Type is one of these..." and then check up to eight different Types you want to include.

### Refresh

Click the **Refresh** button to refresh the birthday list now.

Volgistics will automatically refresh the birthday list on whichever frequency you choose for the "Update the birthday list..." setting (monthly, weekly, or daily), and whenever you change and then Save the Birthday List settings. You the Refresh button if you want to refresh the birthday list before the next scheduled monthly, weekly, or daily update.

### Save

Click **Save** to save your changes to the birthday list settings, and refresh the birthday list.

### Cancel

Click **Cancel** to close the Birthday lists window without saving your changes.

## **Related help**

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## **How to Setup the Clipboard Copy Feature**

Help topic 1150

Added or revised 01-18-2012

---

Use the Clipboard Copy setup page to select which information in a volunteer's record will be copied to your computer's "clipboard" when you use the [copy \[pg:0427\]](#) button.

If you're not already on the Clipboard copy setup page, you can get there like this: Choose Setup from the menu, click on Other options, and click on Clipboard copy.

### Allow copying to clipboard

To turn on the clipboard copy feature, mark this box. If this box is un-checked, you will not be able to use the copy feature in Volgistics.

### **When copying & pasting individual names and addresses include:**

If you allow copying to the clipboard, you must choose how you would like the volunteer's name to appear when it is pasted into another document.

#### *Title First name Last name*

Choose this option if you would like the information in the Title field (such as "Dr." or "Ms.") to be included in the name, along with the text stored in the First name and Last name fields, in that order. If this option is chosen and the Title field is blank, just the first and last names will appear.

#### *First name Last name*

Select this format if only the first and last names should be copied to the clipboard.

### Last name, First name

Choose this option to copy and paste the text in the Last name field, followed by a comma and then the text stored in the First name field.

Choose among the following options to select which information should be copied to the clipboard along with the volunteer's name:

### Mailing address

Marking this option will cause the volunteer's mailing address, including information in any of the Street fields, the City field, the State field and the Zip field, to be copied to the clipboard.

### Group name

Select this option if you use [group records \[pg:1909\]](#) in your account and you want the name of the group copied to the clipboard.

### Nickname

Choose this field if the copied information should include the text in the Nickname field. If this option is selected and there is no information in the Nickname field for the selected record, this will simply be excluded when the information is pasted into a document.

### Number

Select this option if the [volunteer number \[pg:1856\]](#) stored in the Number field should be copied to the clipboard.

### Type

Marking this option will cause the volunteer's [Type \[pg:0212\]](#) to be copied to the clipboard.

### Email

If the volunteer's email address should be copied to the clipboard when you use the Copy button, choose this option.

### Phone numbers

If you choose to copy phone numbers stored on the Core tab, you can specify which numbers should be copied to the clipboard:

#### *All phone numbers that are "OK to call"*

Choose this option to copy only those phone numbers for which the "OK to call" box is checked.

#### *All phone numbers*

To copy all recorded phone numbers, regardless of whether or not the "OK to call" box is checked, select this option.

#### *Just these phone numbers*

Choose this option to copy only certain numbers from the Core tab. Then mark the boxes next each type of phone number you would like to copy from the list below.

---

## How to customize which fields appear in the volunteer list

Help topic 1202

Added or revised 02-09-2017

---

When you view lists of volunteers on the Volunteers page you see volunteer names in a list format along with key information for each volunteer, such as their address.

	Name	Tag	Street	City	State	
	<input type="text" value="Search Name"/>		<input type="text" value="Search Street"/>	<input type="text" value="Search City"/>	<input type="text" value="Search S"/>	<input type="text" value="Se"/>
	Armstrong, Mary E	<input type="checkbox"/>	4985 Maloy Court	Cascade	MI	496
	Baccus, Lydia R	<input type="checkbox"/>	4632 Cherry Ridge Drive	Wyoming	MI	496
	Bailey, Victor R	<input type="checkbox"/>	2401 Franklee Lane	Caledonia	MI	493
	Barker, Geraldine D	<input type="checkbox"/>	2412 Werninger Street	Comstock Park	MI	493
	Barnes, Merry R	<input type="checkbox"/>	3200 Saint Clair Street	Grandville	MI	494
	Barra, Cathv R	<input type="checkbox"/>	2563 Tree Top Lane	Wavland	MI	496

### Choosing Fields/Columns

You can control which fields, or columns, appear in this on-screen list to suit your organization's preferences.

To customize which fields appear in this list:

1. Select [Setup \[pg:0887\]](#) from the [menu \[pg:0215\]](#).
2. Expand the *Other options* link.
3. Select *Volunteer list*.
4. Check the box next to the fields you want to appear on the list. The [record icon \[pg:0756\]](#), volunteer name (last name, first name), and the [Tag \[pg:1529\]](#) fields are always included on the list. *Changes you make to these settings affect all [System Operators \[pg:0065\]](#) in your account.*

## Volunteer List

### Include these fields on the Volunteer List page:

- Name (always included)
- Middle name (Appended to Name)
- Group Name
- Street Address
- City
- State
- Zip
- Number
- Status
- Type
- Kind
- Home
- Work
- Cell
- Fax
- Pager
- Other
- Email
- Email validity icon
- Text
- Text message validity icon
- Date of last activity
- Date entered
- Start Date
- Stop Date
- Last VicNet Access

5. Click the **Save** button.

### Hint

Avoid choosing more fields than necessary. If you select more fields than the width of your monitor allows, you will need to scroll over to see the additional information. This can be confusing because you will no longer be able to see the name of the volunteer the information is associated with.

Remember you can click anywhere in a row to see more details for a volunteer.  
The customizations for the Volunteers page only affect the on-screen view you see after you select

### *Volunteers*

from the menu. If you are looking for instructions on how to control the fields that appear on a printed report, please see [help topic 2223 \[pg:0467\]](#).

### Changing Sort Order

Initially when the list is shown it is sorted in alphabetical order based on the record's last name. You can change the sort order for the page by clicking on any of the column headings. For example, if you include the volunteer numbers on this page, you can sort the page from lowest to highest volunteer number by clicking the "Number"

heading. Click the heading again to sort the page from highest to lowest volunteer number. Similarly, if you include the volunteer's [Start Date \[pg:1890\]](#), you can sort the page from the oldest to the most recent date by clicking the "Start Date" heading. Volunteer records without an entry in the Start Date field will appear at the bottom of the list. Click the heading again to sort the page from the most recent to the oldest date. Volunteer records without an entry in the Start Date field will appear at the top of the list.

**Please note:** It is not possible to sort columns with icons or checkboxes such as the Tag column, or the [email validity \[pg:0377\]](#) or [text number validity \[pg:0333\]](#) indicator columns.

#### Related help

[Help Topic 2023 \[pg:1982\]](#) - Finding volunteer records

[Help Topic 2291 \[pg:1621\]](#) - Why can't I see or find volunteer records?

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## Time Zone Settings

Help topic 2111

Added or revised 05-13-2016

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Your Volgistics account has a default time zone setting. In addition, each [System Operator \[pg:0065\]](#) and each [VicTouch \[pg:1778\]](#) station has a time zone setting.

#### Administrative Tasks

Some of the instructions in this help topic may require [Volgistics Administrator \[pg:0052\]](#) level access to your system. If you are not the Volgistics Administrator for your organization you may need to contact them for assistance.

#### Default time zone

Your account has a default time zone setting. Each time you add a new System Operator their time zone is initially set to this default time zone. If you use [VicTouch \[pg:1778\]](#), VicTouch stations also default to this time zone.

To set the default time zone for your account:

1. Choose Setup from the [menu \[pg:0215\]](#).
2. Select 'Other options.'
3. Select 'Date and time settings.'
4. Select your default time zone under "Time zone."
5. Click the **Save** button.

#### System Operator Time Zones

Each System Operator also has a time zone setting. This makes it possible for Volgistics to localize date and time values for individual System Operators, even in organizations where some System Operators work in different time zones.



If a System Operator's time zone setting is not set to the time zone where they normally work, they may not see the correct date or time in Volgistics fields that default to the current date and time, or on the [Who's Here \[pg:1772\]](#) page.

To adjust a system operator's time zone setting:

1. Choose Setup from the [menu \[pg:0215\]](#).
2. Select 'System Operators.'
3. Click on the System Operator's name.
4. Choose this System Operator's correct time zone under "This operator's time zone."
5. Click the **Save** button.

This change will take effect the next time the System Operator logs-in to Volgistics.

### **VicTouch Time Zone**

[VicTouch \[pg:1778\]](#) also includes a time zone setting. By default – and if you use [unattended startup \[pg:1765\]](#) - VicTouch stations are set to the default time zone for your account. VicTouch obtains the current date and time for your time zone from the Volgistics system, not from the computer where VicTouch is running.

#### If VicTouch does not display the correct time

If your account's default time zone was not set correctly when VicTouch was started, or if the incorrect time zone was selected when VicTouch was started, VicTouch will not display the correct local date and time.

To correct this:

1. Check your account's default time zone setting as described under *Default time zone* above.
2. At the station where VicTouch does not display the correct date or time, perform these steps:
  - a. If VicTouch is running, [shut-down VicTouch \[pg:1762\]](#).
  - b. Start Microsoft Internet Explorer at the VicTouch computer and clear the browser *cookies*. To clear the cookies:
    - Choose Tools from the Internet Explorer menu, and then select Internet Options.
    - Under Browsing History click the **Delete** button.
    - Click the **Delete Cookies** button.
    - Click the **Close button**.
  - c. Restart VicTouch using the [VicTouch shortcut \[pg:1765\]](#).

If VicTouch has not been set up for unattended startup, the Time Zone setting screen shown below will appear. Touch **Yes** if the correct time zone is selected. If the correct time zone is not already selected touch **No** and then choose the correct time zone.



VicTouch should now use the correct date and time.

If VicTouch is setup for [unattended startup \[pg:1765\]](#) you will not see the Time Zone screen shown above, and VicTouch will use the default time zone setting for your account.

### Using Current Time button on Who's Here page

When editing entries on the [Who's Here \[pg:1772\]](#) page, the **Add current time** button uses the time on the computer you are using to edit the entry. So if this is incorrect, you will need to correct the local computer's time setting instead of following the directions in the "VicTouch Time Zone" section above.

### Daylight Saving Time

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## Birthday Lists

Help topic 2148

Added or revised 10-23-2012

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Wishing volunteers "happy birthday" is a common practice in many volunteer programs, and Volgistics makes it easy to know who has upcoming birthdays or whose birthday is today.

With the *birthday list* feature, Volgistics can automatically show you volunteer birthdays for the current day, week, or month on the Welcome page each time you login.

## Birthdays

This month

Sort by Date

Susan Alpin	May 24
Jessica Joplin	May 6
George Lupin	May 2
Larry Mandrake	May 23
Sara Ann McCorky	May 19
Allison Moore	May 23
Fern Nagleford	May 1
Louise Nederveld	May 28
Marissa Nixon	May 1
Renea Rivera	May 24

By default, the birthday list is sorted alphabetically by the volunteer's last name each time you visit the Welcome page. However, you can quickly sort it by date order by clicking the **Sort by Date** button at the top of the list. Click the **Sort by Last Name** button when the list is in date order to change the list back to being sorted by last name.

The birthday list gets volunteer birthdays from the [Date of birth \[pg:1861\]](#) field in the Personal box on the Profile tab.

### Personal

Date of birth:   Age:   Omit from birthday lists

In order to appear on the list, you (or the volunteer) must have entered at least the volunteer's month and day of birth in the *Date of birth* field. A volunteer will never appear on the birthday list if their *Date of birth* field is left empty because Volgistics cannot determine when their birthday is without this information.

The birthday list will only show birthdays for volunteers in the non-archived section of your account. Because records in the archived section are generally stored due to inactivity, these records will not appear on the list. You can find out more about archived and non-archived records [here \[pg:0709\]](#).

If you choose to use the birthday list features, Volgistics provides an "Omit from birthday lists" checkbox next to the *Date of birth* and *Age* fields on the Profile tab in each volunteer's record. Check this checkbox for any volunteer who prefers not to have their birthday listed. This enables you to track dates of birth for all volunteers, while giving you the flexibility of honoring individual volunteer requests to be omitted from published birthday lists. If you use VicNet, volunteers can opt-out of birthday lists themselves by checking this option on the Profile tab in their own record.

The birthday list feature displays the volunteer's name, followed by their month and day of birth. It does not display their year of birth, even if one is entered in their *Date of birth* field.

To [setup birthday list \[pg:1378\]](#) features:

1. Select Setup From the [menu \[pg:0215\]](#).
2. Expand the "Other options" link.
3. Select "Birthday lists."

### Related help

[Help Topic 1067 \[pg:1378\]](#) - Setup birthday lists

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## Statistics

Help topic 2260

Added or revised 09-17-2009

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Use the Statistics Setup page to tailor certain statistical reporting rules for your database. If you're not already on the Statistics setup page you can there by choosing Setup from the [menu \[pg:0215\]](#), selecting 'Other options,' and then selecting 'Statistics.'

### Statistics

Use this section to select the statistics you want to appear in the Statistics box on the Core tab for each volunteer.

#### Date of last activity

Check the 'Date of last activity' checkbox if you want the [Date of last activity \[pg:0076\]](#) field to appear on the Statistics box for each volunteer.

#### Years of service

Check the 'Years of service' box if you want the [Years of service \[pg:0077\]](#) field to appear on the Statistics box for each volunteer.

#### Life

YTD

MTD

Use the checkboxes under these headings to choose the volunteer service totals you want to appear in the Statistics box for each volunteer.

Check items in the 'Life' column to include the grand total of all service ever recorded for a volunteer.

Check items in the 'YTD' column to include *year-to-date* service totals for a volunteer. These subtotals are for the fiscal year you set for your account. On the first day of each fiscal year these subtotals automatically return to zero until the first service entry is made for a volunteer in the new fiscal year. (This setting effects only the service totals displayed in the Statistics box on the Core tab. You can always print service reports for any current or past fiscal year whenever you choose.)

Check items in the 'MTD' column to include *month-to-date* service totals for a volunteer. These subtotals are for the current month. On the first of each month these subtotals automatically return to zero, until the first service entry is made for a volunteer in the new month. (This setting effects only the service totals displayed in the Statistics box on the Core tab. You can always print service reports for any current or past month whenever you choose.)

In addition to Life, YTD, and MTD subtotals, you may also include up to two 'floating subtotals' in the Statistics box (see 'Floating subtotals' below). To include one or both floating subtotals in the Statistics box, check them here.

### **Volgistics fiscal year**

Volgistics calculates year-to-date (YTD) service statistics based on a 12 month cycle you define here. This 12 month cycle is known as the Volgistics fiscal year.

If you want Volgistics to report year-to-date service based on the calendar year (January through December), choose January from the drop down.

If you want Volgistics to report year-to-date service based on a 12 month period that is not the same as the calendar year – such as a fiscal year used by your organization – choose the first month of that fiscal year here.

The Volgistics fiscal year is used as the basis for calculating these statistics:

- YTD Hours. The Year-to-date (YTD) hours field which appears in the Statistics box on the core tab is the sum of each volunteers service since the first day of the current Volgistics fiscal year.
- Service summary reports. The [Service Summary Report \[pg:0580\]](#) format includes an option for printing volunteer service statistics for either the calendar year, or the Volgistics fiscal year.
- Award criteria. You can create award rules based on service performed during the calendar year or the Volgistics fiscal year.

### **Years of service**

Volgistics calculates a volunteer's [years of service \[pg:0077\]](#) as the number of years (and months) the volunteer's status has been any of the statuses checked in this section. For example, if you check only the 'Active' status here, volunteer years of service will include just the number of years the volunteer has been active.

Check all of the statuses if you want volunteer years of service to be the number of years since each volunteer's earliest status date (all of the years since they first started, even if they have had periods of inactivity).

### **Floating subtotals**

In addition to MTD, YTD, and Life service totals, Volgistics gives you an option for displaying volunteer service subtotals for two additional time periods that you choose here. These are called "floating" subtotals because you may change the time period they include whenever you choose.

These are examples of time periods you might choose to display service subtotals for:

- Last year (choose the beginning and end of your last fiscal year, of the last calendar year).
- A 2nd fiscal year (choose the beginning and end of a second fiscal year).
- A 'quarter' (choose the beginning and ending dates of any three month period).
- This month last year (choose this month last year as both the beginning and ending date)

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## Date and Time Settings Setup Page

Help topic 2495

Added or revised 11-29-2008

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This topic explains how to setup the date and time zone settings for Volgistics. If you're not already on the Date and Time Settings Setup Page, you can get there by selecting Setup from the [menu \[pg:0215\]](#), clicking Other options, and then clicking Date and time settings.

### Time zone:

Use the dropdown menu to select the appropriate default time zone for your organization.

### Format dates as:

#### *Month/Day/Year*

Choose this option to display dates in the month/day/year format (e.g. October 20, 2009 will appear as 10/20/2009).

#### *Day/Month/Year*

Choose this option to display dates in the day/month/year format (e.g. October 20, 2009 will appear as 20/10/2009).

### **Related help**

[Help Topic 2111 \[pg:1383\]](#) - Time Zone Settings

[Help Topic 1009 \[pg:1584\]](#) - Incorrect Time on the Who's Here Page

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## Duplicate Checking

Help topic 2496

Added or revised 02-11-2014

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This topic explains how to setup the duplicate checking settings for Volgistics. If you're not already on the duplicate checking setup Page, you can get there by selecting Setup from the [menu \[pg:0215\]](#), clicking Other options, and then clicking Duplicate checking.

### **Duplicate checking**

#### Perform duplicate checking:

Mark this box to turn on the duplicate checking feature, which will cause the system to automatically check new volunteer records as you add them to your database for possible duplicates.

#### Consider a record a possible duplicate if...

Mark one or more of the options below as indicators of possible duplicate records. When a new record exhibits the characteristics in the option(s) checked below, Volgistics will treat the record as a possible duplicate of an existing record.

*First and last names are spelled the same*

*Email address is the same*

**If a possible duplicate is found**

Select one of the following choices:

Show the identifying information about the possible duplicate no matter which Site(s) the possible duplicate is assigned to

If this option is selected, a system operator will be able to see a potential duplicate volunteer's identifying information, even if that volunteer is assigned to a Site other than the operator's Site(s).

*If a duplicate is found at a Site other than the user's Site, the user can assign that volunteer to their own Site too.*

Mark this option if a system operator should also be able to see volunteers at other Sites in the account and then add the volunteer to his or her own Site.

Show the identifying information about the possible duplicate only if the possible duplicate is assigned to the user's Site

When this option is selected, the duplicate checking feature will still be prompted, but the system operator will not be able to view identifying information about the possible duplicate unless he or she is assigned to the system operator's Site(s).

**Related help**

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## Holidays

Help topic 1022

Added or revised 10-03-2016

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Use the Holidays page to record any dates your organization closes for a holiday. If you are not already on the Holidays page you can get there by choosing Setup from the [menu \[pg:0215\]](#), selecting 'Scheduling;' and then choosing 'Holidays.'

Entering a holiday here causes any regularly scheduled volunteers to be removed from all schedules on the date of the holiday. Openings will appear on a designated holiday only if the opening was added as a 'one time' opening. This gives you the ability to override a holiday in selected assignments (if you want to) by deliberately scheduling volunteers for those assignments on that date or adding schedule openings specifically to that date, as 'one time' openings. In addition, ongoing openings will not appear on the online application form for a date you make a holiday.

For example, on a particular holiday no volunteers are needed for any of your regular openings. However, there is one important assignment that you want to staff even though it's a holiday. To do this you would enter the holiday as usual. This removes all of the regular openings and all of the regularly scheduled volunteers from the schedule system wide.

Then you can go to the schedule for that one important assignment and either add an opening or schedule a volunteer for that date only. These one-time schedule entries made on a holiday will then override the holiday setting.

### Date

Enter the date of the holiday here.

### Holiday

Enter the name of the holiday here (e.g. 'Thanksgiving').

### Save

Click the **Save** button to save your changes.

### Cancel

Click the **Cancel** button to exit without saving your changes.

### Delete

To delete a holiday entered previously, click the Delete link next to the holiday entry you want to delete.

### Edit

To change a holiday entered previously, click the Edit link next to the holiday entry you want to change, use the Edit box to make your changes, and then click the **Save** button.



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## Scheduling Ground Rules

Help topic 1181

Added or revised 10-24-2011

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The Scheduling Ground Rules page is where you customize the overall settings for schedules in Volgistics. If you are not already on the Scheduling Ground Rules page, you can get there like this: choose Setup from the menu; click on Scheduling, and click on Ground rules.

### Hours of operation

Use this section to indicate your organization's [hours of operation \[pg:1395\]](#). The hours you enter here affect which hours are available as options for scheduling and availability tracking. Enter the earliest time volunteers serve in the "Start at" field and the latest time volunteers serve in the "End at" field.

### Scheduling interval

Choose to schedule volunteers on 15 minute intervals, 30 minute intervals, or one hour intervals.

#### *15 Minute intervals*

If you choose 15 minute intervals, you can schedule a volunteer for a shift that starts or ends on the hour, quarter past the hour, half past the hour, and a quarter 'til the hour. For example, scheduling options between 9:00 and 10:00 am will include 9:00, 9:15, 9:30, 9:45 and 10:00 am.

#### *30 Minute intervals*

If you choose 30 minute intervals, you can schedule a volunteer for a shift that starts or ends on the hour or half past the hour. For example, scheduling options between 9:00 and 10:00 am will include 9:00, 9:30 and 10:00 am.

#### *One hour intervals*

If you choose one hour intervals, you can only schedule a volunteer for a shift that starts or ends on the hour. For example, scheduling options between 9:00 and 10:00 am will include only 9:00 and 10:00 am.

### Volunteer status

Remove volunteers from schedules when their Status changes to:

In many organizations, a volunteer who *becomes* Inactive, LOA, or another Status often no longer needs to appear on schedules. When you mark a checkbox here, you are choosing to automatically remove a volunteer from the schedule when their Status changes to one that has been marked.

This change is not retroactive. That is, if none of the Statuses are checked here, and your system contains Inactive volunteers who are still on a schedule, selecting "Inactive" here and saving your changes will not cause your already Inactive volunteers to be removed from the schedule. On the other hand, if you first select "Inactive" here and save your changes, and there is an Active volunteer on the schedule whose Status is then changed to "Inactive," they will be removed from the schedule upon their Status change.

## **Additional options**

### Do not allow conflicting schedules

Marking this checkbox turns on Volgistics' **schedule conflict prevention** [pg:1398] features. That is, the system will prevent a volunteer from being scheduled at a date and time that would cause a conflict with that volunteer's existing schedule.

This setting is not retro-active. If there are any schedule conflicts that exist before you turn-on conflict checking they will still exist after this is turned-on.

### Use substitute tracking

When this option is checked, a "Substitute" field will become part of your schedule entries. If you want to indicate the name of a volunteer who is serving in place of another volunteer, **substitute tracking** [pg:0745] allows you to do so.

### We schedule most volunteers

#### *On a regular ongoing basis*

If most volunteers are scheduled for a repeating schedule (i.e. every Monday from 1:00 pm until 5:00 pm; every Saturday and Sunday from 9:00 am until 12:00 pm), choose this option. The effect of making this selection is that schedule entries created from a Site, Place, or Assignment's Schedule tab will be "regular" entries by default.

#### *On a one-time basis*

If most volunteers do not have a regular, ongoing schedule and are instead scheduled for single shifts, choose this option. The effect of making this selection is that schedule entries created from a Site, Place, or Assignment's Schedule tab will be "one-time" entries by default.

### Initially display the

#### *Monthly calendar*

If you select this option, the schedule will be displayed in the monthly calendar format when you go to a Site, Place, or Assignment's Schedule tab. This setting does not affect how the schedule is displayed when you choose Schedule from the main menu; this will always go to a daily schedule view.

#### *Daily calendar*

If you select this option, the schedule will be displayed in the daily schedule format by default when you go to a Site, Place, or Assignment's Schedule tab.

### Default to

#### *The current date*

Choosing this option will cause all schedules to display the current date. Monthly calendars will default to the month that contains today's date, and daily schedules will automatically display today's schedule.

#### *This date:*

Choosing this option allows you to select a specific date for the schedule to automatically display. For example, if you select this option and enter June 1, 2020 in the dropdown fields, choosing Schedule from the menu will bring you directly to the daily schedule for June 1, 2020. Likewise, June 1, 2020 or June 2020's schedule will be

displayed when you go to a Site, Place, or Assignment's Schedule tab.

#### Display volunteer's...

Mark the checkboxes for each item that should be displayed on the *daily view* of the schedule. This option controls which items will appear on the *daily view* of the schedule that system operators see. To change which items appear on the *calendar view*, change the settings in the "Monthly calendar view options" section below.

If you choose to include phone numbers and mark the "Only list phone numbers that are OK to call," then only the phone numbers that are selected here *and* have the "OK to call" box checked on the volunteer's Core tab will be displayed on schedules.

### **Monthly calendar view options**

#### Display Assignment names...

*With Site and Place names*

Choose this option to show the Site and Place next to the Assignment name on schedules.

*Without Site and Place names*

Choose this option to display only the Assignment name on schedules.

#### Include schedule icons

Check this option if you would like the opening icons to appear on your view of *monthly calendars*. The opening icons show which openings are filled and unfilled, and where volunteers are scheduled without openings.

- Unfilled schedule opening
- Filled schedule opening
- Scheduled volunteer (who does not fill an opening)

Un-checking this option reduces the amount of space (from left to right) required to display monthly calendars.

This option controls the appearance of opening icons on the *calendar view* only (opening icons will always appear on the schedule's *daily view*).

#### Include notes

Check this option if you want schedule notes to appear on your view of the monthly calendars. This option controls whether or not notes will appear on the calendar view that system operators see. The schedule notes will always be shown on the daily view of the schedule for system operators. The notes are also shown by default when volunteers and/or coordinators view their schedules through VicNet or VicTouch.

#### Display volunteer names as

*First initial. Last name*

Choosing this option would cause the name of a volunteer named Tom Smith to be displayed as "T. Smith" for example.

*First name Last name*

Choosing this option would cause the name of a volunteer named Tom Smith to be displayed as "Tom Smith" for example.

*Last name, First name*

Choosing this option would cause the name of a volunteer named Tom Smith to be displayed as "Smith, Tom" for example.

Include volunteer's...

Mark the checkboxes for each item that should be displayed on the monthly view of the schedule. The selected information will appear on the monthly schedule only.

If you choose to include phone numbers and mark the "Only list phone numbers that are OK to call," then only the phone numbers that are selected here *and* have the "OK to call" box checked on the volunteer's Core tab will be displayed.

### **Time sheet view options**

Sort time sheets by...

*Volunteer name*

Select this option to view the schedule in the Time Sheet format listed alphabetically by the volunteer's last name.

*From time*

---

## **Hours of Operation**

Help topic 2257

Added or revised 05-16-2011

---

You can set your organization's 'hours of operation' in Volgistics. Setting your hours of operation makes certain functions – such as scheduling and availability tracking – easier by listing only the times that occur during the hours you operate.

Your hours of operation are the hours of the day volunteers typically serve.

To set your hours of operation:

1. Choose Setup from the [menu \[pg:0215\]](#).
2. Select 'Scheduling.'

3. Click the 'Ground rules' link.

4. In the 'Hours of operation' setting select your 'Start at' and 'End at' times.

Select the earliest time of day volunteers typically serve as the 'Start at' time. Select the latest time of day volunteers typically end their service as the 'End at' time.

For example, if your earliest volunteers typically start at 7:00 am; and volunteers typically complete their service by 10:00 pm; enter 7:00 am as your 'Start at' time and '10:00 pm' as your 'End at' time.

If volunteers serve around the clock, choose 12:00 am as your 'Start at' time **and** your 'End at' time.

5. Click the **Save** button.

If your organization does not need to schedule volunteers around-the-clock, it's best to select the earliest time you typically schedule volunteers for your 'Start at' time; and the latest time volunteers would typically serve until as your 'End at' time. This makes scheduling and availability tracking easier by eliminating all of the unnecessary times from the time drop down lists on your schedule and availability time fields.

#### **Related help**

[Help Topic 2258 \[pg:0789\]](#) - Around-the-clock scheduling

---

## **On-Demand Schedule Reminders**

Help topic 2272

Added or revised 03-28-2014

---

Volgistics can send [schedule reminder email messages \[pg:0791\]](#) for you automatically on a monthly or daily basis. In addition to (or instead of) these automatic reminders, you can also trigger the sending of schedule reminder email messages manually whenever you choose. This capability is especially useful if you want to send schedule reminders or confirmations more than one month in advance of special events.

When you trigger schedule reminder emails manually, you can choose the range of dates for which schedule entries will be included. Volunteers scheduled more than once during the date range you select receive just one reminder email with each of their scheduled assignments and times listed.

As with automatic schedule reminder emails, only the schedules for assignments with the 'Schedule reminders' checkbox checked are included. The 'Schedule reminders' checkbox appears on the Assignment tab for each assignment as shown below. Reminder emails do not include schedules for assignments that do not have this 'Schedule reminders' checkbox checked.

### Ticket booth

Assignment | Coordinators | Profile | Description | Volunteers | Schedule

Save | Cancel | Combine, move or delete

**Name**

Site: **Monroe County**  
 Place: **Volunteer Services**  
 Assignment: Ticket booth  
 Impact:   
 Status: Active   Advertise  Sign-in option  Schedule reminders

To send schedule reminders to volunteers on a specific date:

1. Choose Setup from the menu [pg:0215].
2. Select 'Scheduling.'
3. Select 'Monthly & on demand volunteer reminders.'
4. If your schedule reminder message is not already configured, enter the text you want to appear in the reminder email message, and choose the schedule fields you want to include in the reminders using the fields in the "Monthly & on-demand volunteer reminders" box. You do not need to check the 'Send monthly reminders' checkbox if you only want to send reminders manually. Check the 'Send monthly reminders' checkbox only if you want monthly schedule reminders sent automatically.
5. If you want to see a sample of the reminder message before you send it, enter your own email address in the 'Sample' box and then click the **Send sample now** button. A sample will be sent to email address you specify within several minutes.
6. Scroll down to the "Send now" box.
7. Select the date range you want to send reminders for. For example, if you select December 22, 2006 through December 30, 2006; all of the schedule entries between these dates will appear in the reminder.

### Send Now

You can optionally send these schedule reminder emails now, for the date range you choose below. To send these schedule reminder emails now, enter the date range for which you want to send reminders and then click the **Send Reminders now** button.

Send reminders for schedule entries:

From: December  22  2006   
 Through: December  30  2006

8. Click the **Send reminders now** button.

The reminder messages will be sent as soon as you click the **Send reminders now** button. Reminders will be sent to every volunteer who...

- Has an email address in their record.
- Is scheduled during the date range you select in any of the assignments for which the 'Schedule reminders' checkbox (shown above) is checked.
- Has not [declined schedule reminder email \[pg:0409\]](#) messages.

Email reminders cannot be sent to volunteers for whom an email address is not entered.

If you schedule both individuals and groups in Volgistics, schedule reminders are sent to all *Individual* volunteers, and to the group contact for each [Group record \[pg:1909\]](#) scheduled. In the case of *Group* records (where you do not track the group members individually), there is not a way to send automatic schedule reminders to the separate members of a group you've scheduled, as their individual email addresses are not tracked. Instead the group contact would receive the automatic schedule reminder.

#### Related help

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## How can I prevent volunteers from having overlapping schedules?

Help topic 2280

Added or revised 08-07-2006

---

You can setup Volgistics to prevent a volunteer from being scheduled at a date and time that would cause a conflict with that volunteer's existing schedule.

To setup Volgistics to perform this kind of schedule conflict checking:

1. Choose Setup from the [menu \[pg:0215\]](#).
2. Select 'Scheduling.'
3. Select 'Ground rules.'
4. Under "Additional options" check 'Do not allow conflicting schedules.'
5. Click the **Save** button.

Once you setup Volgistics to prevent duplicate schedules you cannot add a volunteer to a schedule for a date and time that would conflict with another of that volunteer's schedules.

---

## Monthly & On-Demand Volunteer Reminders Setup Page

Help topic 2491

Added or revised 11-25-2008

---

You can use the Monthly & On-Demand Volunteer Reminders setup page to configure Volgistics' monthly and on-demand schedule reminders feature. To get to the Monthly & On-Demand Volunteer Reminders setup page, choose Setup from the [menu \[pg:0215\]](#), click on Scheduling, and then choose Monthly & On-Demand Volunteer Reminders.

### *Send monthly reminders*

Mark this checkbox to turn on the monthly schedule reminders feature. Monthly reminders will not be sent if this box is unmarked.

*Send these on the "xx" day of the preceding month.*

Use the dropdown field to select the date reminders should be sent. If you choose "25th" from the dropdown field, the monthly reminders for the month of April will be sent out on March 25th.

### *Subject*

Enter the subject line you would like volunteers to see when they receive the monthly reminder email message here.

### *Top of message:*

Enter the text you would like to appear above the schedule information in this text box.

### *Include*

Choose one or more of the optional pieces of information for inclusion in the monthly reminder email.

- Include:
- Day of the week
  - Start time
  - Stop time
  - Assignment name
  - Note
  - Substitute information

### *Bottom of message:*

Enter the text you would like to appear below the schedule information in this text box.

### **Sample**



To test your changes to the options on this page, enter the email address that should receive a sample schedule reminder, and click the **Send sample now** button.

### **Send Now**

Use this section if you would like to send "on-demand" schedule reminders to your volunteers. Use the "From" and "Through" dropdown fields to indicate the schedule entry dates for which reminders should be sent, and click the **Send reminders now** button.

---

## **Monthly & On-Demand Coordinator Reminders Setup Page**

Help topic 2492

Added or revised 9-9-2015

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You can use the Monthly & On-Demand Coordinator Reminders setup page to configure Volgistics' monthly and on-demand schedule reminders that are sent to [Coordinators \[pg:0163\]](#). To get to the Monthly & On-Demand Coordinator Reminders setup page, choose [Setup \[pg:0887\]](#) from the [menu \[pg:0215\]](#), click on Scheduling, and then choose Monthly & On-Demand Coordinator Reminders.

### *Send monthly reminders*

Mark this checkbox to turn on the monthly schedule reminders feature. Monthly reminders will not be sent if this box is unmarked.

*Send these on the "xx" day of the preceding month.*

Use the dropdown field to select the date reminders should be sent. If you choose "25th" from the dropdown field, the monthly reminders for the month of April will be sent out on March 25th.

### *Subject*

Enter the subject line you would like Coordinators to see when they receive the monthly reminder email message.

*Top of message:*

Enter the text you would like to appear above the schedule information in this text box.

### *Include*

Choose the schedule information that you want to appear in the message.

- Include:
- Day of the week
  - Start time
  - Stop time
  - Note
  - Substitute information
  
  - Include openings

Please note the following about the *Include* options:

- The *Note* information is the [schedule entry \[pg:0750\]](#) notes specific to each volunteer. This is not the same as the notes that can be added to each instance of a [schedule opening \[pg:0776\]](#).
- The *Substitute information* will show replacement volunteers scheduled with the [substitute tracking \[pg:0745\]](#) feature.
- If *Include openings* is checked the Coordinator's schedule will show any [unfilled openings \[pg:0776\]](#) for the date. This can be useful if the Coordinator needs to arrange for other volunteers to be scheduled to assure coverage.

*Bottom of message:*

Enter the text you would like to appear below the schedule information in this text box.

### Sample

To test your changes to the options on this page, enter the email address that should receive a sample schedule reminder, and click the **Send sample now** button.

### Send Now

Use this section if you would like to send "on-demand" schedule reminders to your Coordinators. Use the "From" and "Through" dropdown fields to indicate the schedule entry dates for which reminders should be sent, and click the **Send reminders now** button.

Coordinator schedule reminders use the reply-to email address you specify for Coordinator email on the [Message Ground Rules \[pg:0929\]](#) page. Please see [help topic 2190 \[pg:0398\]](#) if you need help updating your account's reply-to addresses.

---

## Daily Volunteer Reminders Setup Page

Help topic 2493

Added or revised 11-25-2008

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You can use the Daily Volunteer Reminders setup page to configure Volgistics' daily schedule reminders feature. To get to the Daily Volunteer Reminders setup page, choose Setup from the [menu \[pg:0215\]](#), click on Scheduling, and then choose Daily Volunteer Reminders.

### *Send daily reminders*

Mark this checkbox to turn on the daily schedule reminders feature. Daily reminders will not be sent if this box is unmarked.

*Send these "xx" day(s) before the scheduled date.*

Use the dropdown field to select the number of days before a schedule entry that reminders should be sent. If you choose "1" from the dropdown field, the daily reminders will be sent to volunteers the day before their scheduled service.

### *Subject*

Enter the subject line you would like volunteers to see when they receive the daily reminder email message here.

### *Top of message:*

Enter the text you would like to appear above the schedule information in this text box.

### *Include*

Choose one or more of the optional pieces of information for inclusion in the daily reminder email.

- Include:
- Day of the week
  - Start time
  - Stop time
  - Assignment name
  - Note
  - Substitute information

### *Bottom of message:*

Enter the text you would like to appear below the schedule information in this text box.

### **Sample**

To test your changes to the options on this page, enter the email address that should receive a sample schedule reminder, and click the **Send sample now** button.

---

## Daily Coordinator Reminders Setup Page

Help topic 2494

Added or revised 11-18-2015

---

You can use the Daily Coordinator Reminders setup page to configure Volgistics' daily schedule reminders feature for [Coordinators \[pg:0163\]](#). To get to the Daily Coordinator Reminders setup page, choose [Setup \[pg:0887\]](#) from the [menu \[pg:0215\]](#), click on Scheduling, and then choose *Daily Coordinator Reminders*.

### *Send daily reminders*

Mark this checkbox to turn on the daily schedule reminders feature. Daily reminders will not be sent if this box is unmarked.

*Send these "xx" day(s) before the scheduled date.*

Use the dropdown field to select the number of days before a schedule entry that reminders should be sent. If you choose "1" from the dropdown field, the daily reminders will be sent to Coordinators the day before their scheduled service. If you choose "0" from the dropdown field, the daily reminders will be sent the morning of the day the volunteers are scheduled.

### *Subject*

Enter the subject line you would like Coordinators to see when they receive the daily reminder message.

### *Top of message:*

Enter the text you would like to appear above the schedule information in this text box.

### *Include*

Choose the schedule information that you want to appear in the message.

- Include:
- Day of the week
  - Start time
  - Stop time
  - Note
  - Substitute information
  
  - Include openings

Please note the following about the *Include* options:

- The *Note* information is the [schedule entry \[pg:0750\]](#) notes specific to each volunteer. This is not the same as the notes that can be added to each instance of a [schedule opening \[pg:0776\]](#).

- The *Substitute information* will show replacement volunteers scheduled with the [substitute tracking \[pg:0745\]](#) feature.
- If *Include openings* is checked the Coordinator's schedule will show any [unfilled openings \[pg:0776\]](#) for the date. This can be useful if the Coordinator needs to arrange for other volunteers to assure coverage.

*Bottom of message:*

Enter the text you would like to appear below the schedule information in this text box.

### **Sample**

To test your changes to the options on this page, enter the email address that should receive a sample schedule reminder, and click the **Send sample now** button.

Daily coordinator schedule reminders use the reply-to email address you specify for Coordinator email on the [Message Ground Rules \[pg:0929\]](#) page. Please see [help topic 2190 \[pg:0398\]](#) if you need help updating your account's reply-to addresses.

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## Setting up Mandatory Service

Help topic 1008

Added or revised 08-04-2016

---

Use the Mandatory Service setup page to configure the basic operating rules for the [mandatory service \[pg:1419\]](#) features in Volgistics. If you're not already on the Mandatory Service setup page you can get there by selecting Setup from [menu \[pg:0215\]](#), choosing *Service tracking*, and then clicking on the *Mandatory service* link.

### Mandatory service

*Use the mandatory service features*

Mark this box to enable the mandatory service features in Volgistics. To disable the mandatory service features, un-check this box. Be sure to click the **Save** button at the bottom of the setup page to save your changes.

### Base mandatory service on...

In addition to hours, mandatory service can be based on any other [service measures \[pg:1557\]](#) an organization tracks as well as [Merit Hours \[pg:1564\]](#). Mark the box next to "Merit hours" and/or any other service measures created by your organization to permit service completed under any of these measures to be applied to a mandatory service program. For example, if you track a service measure called "Tours Given" and volunteers must give 5 tours per year, in addition to completing 25 hours of service per year, be sure that not only the "Hours" box is checked, but that the "Tours Given" box is checked here as well.

### Automatically mark complete?

An organization can use this setting to decide whether they want to manually mark mandatory service requirements "Complete" or they want the system to automatically manage Mandatory Service completion for them.

*Automatically manage Mandatory Service completion for me.*

When this option is selected, Volgistics will recognize when the service requirements for a mandate have been met. The system will automatically mark the "Completed" checkbox and enter the appropriate date in the "Completed on" field on the volunteer's Service tab.

Note that if this option is selected, the "Completed" checkbox and the "Completed on" date field will become disabled for [System Operators \[pg:0065\]](#) and the only way either of these fields can be edited is by the system's automatic mandatory service management function.

*Do not manage Mandatory Service completions automatically. I want to mark Mandatory Service complete myself.*

This option will require a System Operator to manually mark the "Completed" checkbox on the date when a volunteer has met the requirements of a service mandate. This is the best option to use when it may be desirable to edit "Completed on" dates or mark a service mandate "Complete" before a volunteer has actually finished all of the required service for the service mandate.

### Show progress at the Volunteer Information Center?

The Service History tab in VicNet can optionally display a chart showing a volunteer's progress toward completing their service mandate(s). An example of this appears below:

## Community Service Service Goal

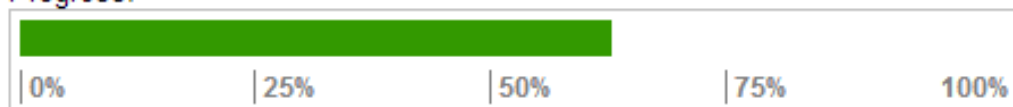
	Hours	Visits
Service goal:	250:00	50
Recorded so far:	145:06	35
Service remaining:	104:54	15

Started: 08-01-2013

Target date: 12-01-2013

Days left: 39

Progress:



This option can also be customized on the VicNet Service History tab setup page. To get to this page select Setup from the menu, choose VicNet, select *Service History tab*. You can find more information on this setting in [help topic 1207 \[pg:1465\]](#).

---

## How to Setup a Service Measure

Help topic 1017

Added or revised 01-25-2017

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Use the service measure setup page to create a new service measure, or to change the way an existing service measure is setup. To access the service measure setup page, select [Setup \[pg:0887\]](#) from the [menu \[pg:0215\]](#), select *Service tracking* and then click on *Service measures*. From this screen, click on the first available measure to create a new service measure, or click on an existing measure to edit it.

### Name

Enter a name for the service measure in the Name field. Examples include *Tours Given*, *Calls Answered*, *Meals Delivered*, *Absences*, and *Mileage*.

### Format

Service measure fields can track numerical information as whole numbers (0); currency (\$0.00); hours and minutes (0:00); numbers with one decimal (0.0), or numbers with two decimals (0.00). Use the drop down Format field to choose the way information for the measure will be entered and tracked. For example, a *Mileage* measure might use the two decimals format, while a *Meals Delivered* measure would use the whole number format.

### Default value

If volunteers almost always complete a specific number of the activity being measured, you can enter that number here. The number entered in the *Default value* field will automatically show up for that service measure each time a service entry is added. Leave this field blank if you do not want a number to appear for this measure by default.

For example, if every time volunteers serve in an animal shelter, they must feed 5 animals in addition to whatever else they are doing, an *Animals Fed* service measure might contain a default value of 5. Each time a [System Operator \[pg:0065\]](#) enters service for volunteers manually, "5 Animals Fed" will be posted as part of the service entry, unless the number in the *Animals Fed* field is manually changed.

If your volunteers enter their service information through the [Time Sheet tab \[pg:1460\]](#) in [VicNet \[pg:1724\]](#), the default will value will show initially. Volunteers can change the default if it should be different.

There is not a way for volunteers to enter service measure information when they sign-in or sign-out through the [VicTouch \[pg:1778\]](#) module. If a default is setup for the service measure, it will be used for the service entry. If changes need to be made to the default value, a System Operator will need to edit the completed service entry.

### **Require an entry**

If an organization wants to make an entry for this measure compulsory, they can choose "Always" from the drop down list in the *Require an entry* field. When this option is checked, a service entry cannot be saved unless a value is entered in the field for this measure.

### **Volunteer view**

You can select the wording that will appear when your volunteers enter their service information through the [Time Sheet tab \[pg:1460\]](#) in [VicNet \[pg:1724\]](#). You can choose between *How Much* and then the service measure's name, *How many* and then the service measure's name, or just have the service measure's name.

### **Include as a grid item**

Checking the box next to *Include as a grid item* will produce a column to track this measure on the volunteer record's [Service tab \[pg:1581\]](#). In the Service box, the measure will be included along with Date, Assignment, Hours and any other fields setup as grid columns so that a System Operator can gauge a volunteer's service under this measure. If this box is not checked, the measure can still be included on reports, but will not show up on a volunteer's Service tab except when you're adding or editing service entries.

### **Save**

Click the **Save** button to save your service measure setup, or the **Cancel** button to close the page without saving your changes.

### **Delete this measure**

If you no longer want to track a service measure, you can click the **Delete this measure** button. Clicking this button removes the service measure field from all of your service records, and it also erases any values previously recorded for this service measure from throughout your database.

*You should only click the **Delete this measure** button if you are certain that you no longer need any of the data previously entered for the selected service measure. You cannot "undo" this action.*



## Make the default value retroactive

If you add a new service measure to your account after you already have some service records entered, you may want to make the default value for the new service measure retroactive to all of your existing service records. You can use the *Make the default value retroactive* button to do this.

For example, suppose you are creating a new service measure to track the number of visits volunteers make to your organization on each service record. If volunteers usually make one visit for each service record you post, you could set the default value for that service measure to "1." Then each time you make a new service record entry, the value of "1" would appear in the *Visits* field by default. If you happened to be making a service record entry that represented multiple visits, then you would simply change the "1" to appropriate number of visits.

In this example, you might also want to populate the new *Visits* field with the default value of "1" in all of your existing service records. A reason that you may want to do this is if you need to find out how many visits volunteers made to your facility in the previous year, and you are just creating a service measure for *Visits* now.

To do this, you would simply click the **Make the default value retroactive** button. When you click this button, Volgistics will insert the default value for the service measure into every service record that's already in your database (if the service measure is currently 0 in a given service record).

Making a new service measure's default value retroactive is useful in situations such as the one described in the example above, where you want the default value to apply to service records that were saved before you created a service measure.

*There is not a way to "undo" making a service measure's default value retroactive unless you edit each and every service entry the value was added to. So please make sure you wish to add the default value to every existing service entry before clicking the button.*

The **Make the default value retroactive** button will be disabled if the service measure does not have a Default value.

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## Auditing Vic Service Entries

Help topic 1072

Added or revised 11-19-2013

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If you use the [VicNet \[pg:1724\]](#) or [VicTouch \[pg:1778\]](#) modules to collect volunteer service information, you can optionally monitor - or audit - all of the service entries made by volunteers. If necessary, you can adjust, or delete, service entries.

When auditing is turned-on for Vic entries, service entries made by volunteers appear **in volunteer records as usual** [\[pg:1579\]](#). However, they also appear on a Service tab in your Volgistics mailbox so you can review the entries which have been posted.

To turn-on auditing for Vic service entries:

1. Choose Setup from the [menu \[pg:0215\]](#).
2. Click the "Service tracking" link.

3. Click the "Service record auditing" link.

4. In the "Auditing" box, check "Those entered through VicNet" if you want to audit service entries made through the VicNet [Time Sheet tab \[pg:1460\]](#). Check "Those entered through VicTouch" if you want to audit service entries made through VicTouch. Please note that there is a separate setting on the [VicTouch Ground Rules \[pg:1511\]](#) page for auditing service entries if a volunteer forgets to sign-out.

5. Click the **Save** button.

Any new service entries posted after you turn-on auditing will appear in the Volgistics mailbox.

If you choose to audit service entries, you should check your Volgistics mailbox for new entries periodically, and before you print any month or year-end service reports.

To audit new service entries:

1. Choose Mailbox from the [menu \[pg:0215\]](#).

2. Click the "Service" tab. Any new service entries that require auditing will appear here. These entries also appear as usual on the Service tab for the volunteers for whom they were entered.

If you would like to delete any of the entries that appear on the Service tab, click the "Delete" link in the right column for the entry you want to delete. Click the "Edit" link to edit a service entry.

You can change the sort order of the service entries awaiting auditing by clicking the Volunteer, Date, Assignment, or Hours links at the top of each column. Sorting by hours makes it easy to locate any entries that have very large hour values.

3. To "approve" entries that appear on this tab, place a check mark next to the entry (to approve all of the entries on the tab, click the **Check all** button), and then click the **Audited** button.

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## How to Setup Merit Hours

Help topic 1101

Added or revised 12-23-2013

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If an organization has determined it wants to use [merit hours \[pg:1564\]](#), a Volgistics [System Operator \[pg:0065\]](#) must turn the feature on and define the rules that will apply to merit hours. Note that merit hours are tracked in addition to regular hours.

### The merit hours setup page

To get to the merit hours setup page, choose [Setup \[pg:0887\]](#) from the menu, click on Service tracking, and click on Merit hours.

Turn on the merit hours feature by checking the "Use merit hours" box on this page.

Up to four rules and/or additional [travel time \[pg:1416\]](#) rules can be applied to service entries. *Please note that if more than one rule applies to a service entry, the system will determine which rule gives the highest total and only use that rule to calculate merit hours.* The exception to this is travel time merit hours, which will apply in addition to other merit hour rules.

Click on the "Rule 1" link to define the first rule. This opens the Merit hour rule setup page.

Before entering any information on the merit hour rule setup page, note that setting more than one condition for a rule will require that all of the conditions are met before the merit hours will be applied. For example, if "Arrive after 5:00 pm" and "Serve on a Sunday" are both checked, merit hours will only be given for volunteers who arrive after 5:00 pm on Sundays.

### **The merit hour rule setup page**

The following options allow System Operators to define when merit hours should be applied and how volunteer hours should be adjusted.

#### **Name**

Optionally enter a name for this Merit hours rule that will help you remember which hours this rule will apply to. This name will appear on the Setup page next to the rule number. For example, if this rule will cause Merit hours to be given to volunteers who serve between 11:00 p.m. and 7:00 a.m., you might name this rule "Overnight shift."

#### **Apply merit hours if volunteers...**

##### Have this Type

Check this box to apply merit hours to only volunteers of a certain [Type \[pg:0212\]](#). Select the Type of volunteers merit hours should apply to from the dropdown list.

##### If their Kind is

If you only want the merit hour rule to be applied to individual or [group \[pg:1909\]](#) volunteer records, check this box and select which records you want the rule to apply to. Leaving the box un-checked will make the rule apply to both individual *and* group records.

##### Arrive...

If merit hours should apply to volunteers who begin serving before or after a certain time, check this box.

Choose "Before" if merit hours should apply to volunteers arriving for service before a specified time. For example, if volunteers who work an early shift that starts before 6:00 am will be getting "time-and-a-half," choose Arrive... "Before" and enter "6:00" am.

Choose "After" if merit hours should apply to volunteers arriving for service after a specified time. For example, if volunteers who begin their service after 9:00 pm should receive additional hours, select Arrive... "After" and enter "9:00" pm.

##### Depart...

If merit hours should apply to volunteers who stop serving before or after a certain time, check this box.

Choose "Before" if merit hours should apply to volunteers departing from service before a certain time. For example, if merit hours should apply to volunteers who finish their shift before 8:00 am, select Depart... "Before" and enter "8:00" am.

Choose "After" if merit hours should apply to volunteers departing from service after a specified time. For example, if merit hours should apply to volunteers who finish their shift after 7:00 pm, choose Depart... "After" and enter "7:00" pm.

#### Serve more than...

If volunteers must work at least a minimum number of hours during a given shift in order for merit hours to apply, choose this box. If, for example, a volunteer must serve at least 7.5 hours before merit hours will apply, check the box and enter "7" in the hours field and "30" in the minutes field.

#### Serve on or between...

If merit hours should apply when a volunteer works within a certain range of dates, choose this option. If, for example, merit hours should apply to volunteers who serve during an organization's summer season that runs from June 15, 2014 through August 31, 2014, a system operator would check this box and enter "6-15-2014" in the first field and "8-31-2014" in the second field. The date fields in this option are inclusive.

#### Serve on a holiday

To apply merit hours on dates specified as a [holiday \[pg:1391\]](#) in Volgistics, check this option. Dates must be designated as holidays by a System Operator before a merit hour rule including this option will apply to service on any particular date(s).

#### Serve on a...

Check this option if merit hours should apply when volunteers serve on one or more days of the week. For example, check the "Serve on a..." option and mark the boxes next to Saturday and Sunday if merit hours should apply for service completed on the weekend.

#### Are in this Set

If merit hours should apply to a group of volunteers designated by a [Set \[pg:0858\]](#), choose this option and select the appropriate Set from the dropdown list.

#### Serve in these Assignments...

If merit hours should be applied when volunteers serve in certain [Assignments \[pg:0096\]](#), choose this option. Mark the boxes next to the names of all Assignments the merit hour rule should apply to.

#### **Adjust their hours by...**

##### Adding...

If a specific number of hours and/or minutes should be added to each service record that meets the characteristics defined above, choose this option. Then enter the appropriate amount of time to be added to each entry in the hours and/or minutes fields.

##### Subtracting...

If a specific number of hours and/or minutes should be deducted from each service record that meets the requirements defined above, choose this option. Enter the appropriate amount of time to be deducted from each entry in the hours and/or minutes fields.

##### Multiplying...

To multiply the actual number of hours served by a specific number when the entry meets the requirements above, choose this option. Enter the number to multiply their hours by in the blank field. For example, select this option and enter "1.5" to multiply hours by 1.5, effectively giving the volunteer "time-and-a-half" for their service that meets the set characteristics.

### *If multiplying...*

If a system operator chooses to multiply hours by a certain number, they must choose whether the entire hour entry or only a portion will be adjusted.

Choose "The entire hour entry" option to multiply the whole hour figure by the designated multiplier.

Choose "The portion served between..." option to only multiply the part of an entry that occurs within a specific time period by the multiplier.

For example, volunteer service might meet the requirements on the merit hour rule setup page, and the system operator might have chosen to adjust their hours by multiplying them by 1.5. The agency may only want the hours that meet the requirements AND were served between 6:00 am and 9:00 am to be multiplied by 1.5. This can be indicated by choosing this option and entering "6:00 am" and "9:00 am" in the appropriate fields.

### **When "switching assignments"...**

If your organization uses the [VicTouch \[pg:1778\]](#) module for volunteers to sign-in and sign-out, you can choose to have the rule apply to all or part of their service entries.

Choose "Only to their final service record for that visit" if you only want the merit hours to apply to the final service entry created for a volunteer through VicTouch on the date of their visit.

Choose "To each of their service records for that visit" if you want the merit hours to apply to each service entry created for a volunteer through VicTouch on the date of their visit.

Click the

#### **Save**

button to save your merit hours rule setup, or the

#### **Cancel**

button to close the page without saving your changes. If you no longer need a merit hour rule, click the

#### **Clear this rule**

button. Please note that if you clear the merit hour rule, it will not change any existing service entries made that originally applied the rule. However, if you open an entry to [edit the service \[pg:1574\]](#), the merit hour total will be adjusted so that the deleted rule no longer applies when the **Save** button is clicked.

After defining one rule, up to three additional merit hour rules can be defined by returning to the

### *Merit Hours Setup*

page. Use as many merit hour rules as are necessary to apply adjusted hours to the appropriate volunteers. You can also click the [travel time \[pg:1416\]](#) link to setup special merit hours to be applied based on how long a volunteer will be traveling to get to your location.

**To use merit hours without having them appear as a column on the Service tab, take the following steps:**

1. Choose [Setup \[pg:0887\]](#) from the menu.
2. Click on *Field options*.
3. Click on *Service tab*.
4. Under *Service box*, click on *Merit hours*.
5. Un-check the box next to *Include as a grid column*.
6. Click the **Save** button.

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## How to Setup Service Values

Help topic 1163

Added or revised 09-23-2016

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If an organization has determined that it wants to attribute monetary value to volunteer service, it should use the [service values \[pg:0034\]](#) feature in Volgistics to do so. This help topic explains how to set, remove or change the monetary value of actual hours, [merit hours \[pg:1564\]](#), or any [service measures \[pg:1557\]](#) an organization tracks.

If you are not already on the service value setup page, you can get there like this:

1. Choose [Setup \[pg:0887\]](#) from the menu.
2. Click on Service tracking.
3. Click on Service values.

From here, choose the type of hours or service for which you would like to customize the value.

### **Value of (actual hours / merit hours / service measure)**

Use this box to enter the default rate Volgistics should use to calculate the monetary value of the type of hours or service measure you have chosen.

Click the **Add** button if a rate other than the default rate should be given to service performed during a different time period. This is useful when an agency's workload is significantly different seasonally or during a certain month. Or if you're using different values for different years. Be sure to save your changes.

In the example below, each actual hour served has a value of \$18.50, except for hours served from January 2015 through December 2015, when each hour served is worth \$23.56.

## Value of actual hours

### Default rate for "actual hours"

Set the default rate you want Volgistics to use to calculate the monetary value of *actual hours*. If you would like to have different default rates for different time periods, click the add button to choose a time period and rate.

Use the default rate of  per "actual hour" for any time period not listed below.

Beginning	Through	Value		
January 2015	December 2015	\$23.56	<a href="#">Edit</a>	<a href="#">Delete</a>

[Help](#)

## Setting different rates for individual Assignments

Service values can be further specified by Assignment. For example, actual hours served in most Assignments might be given the default value of \$18.50, while some Assignments can be skipped or given different monetary values. For example, if an Assignment represents a training or orientation you may not want to assign a monetary value to that Assignment. But if the Assignment is more difficult to perform, hard to fill, or requires special professional training, it can be given a greater monetary value.

Click on the name of an Assignment to give it a monetary rate different than your default rate. Please note that you can set different monetary values in different time periods per Assignment also.

In the example below, the Assignment called Patient Advocate will be given the monetary value of \$31.75 per hour served, except from November through December 2016, when it will be valued at \$33.25 per hour served.

## Value of actual hours in "Patient Advocate"

Set the rate you want Volgistics to use to calculate the monetary value of *actual hours* performed in the **Patient Advocate** assignment. If you would like to use different monetary values for different time periods for *actual hours* service performed in the **Patient Advocate** assignment, click the add button to specify a time period and value.

- Do not calculate any value for service performed in this assignment.
- Always use the default rate of \$18.50 for this assignment.
- Use the rate of  per "actual hour" for any time period not listed below.

Beginning	Through	Value		
November 2016	December 2016	\$33.25	<a href="#">Edit</a>	<a href="#">Delete</a>

[Help](#)

## What monetary amount should I give for the service value?

It is ultimately up to each organization to decide the monetary value of the jobs that volunteers perform. If you have a large organization, this is something the Board of Directors or Human Resources department may be

able to assist with. You could also look on the web for assistance. For example, Independent Sector (a Washington, D.C. based advocacy coalition) announced the U.S. average for volunteer service value was \$23.56 per hour in 2015. The group also releases averages for each State. You can learn more about this group's figures at [https://www.independentsector.org/volunteer\\_time](https://www.independentsector.org/volunteer_time).

### Related help

[Help Topic 1162 \[pg:0034\]](#) - Service Values

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## Auditing Service Entries

Help topic 1208

Added or revised 03-11-2014

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You can setup your account to send some service entries to the Service tab of your Volgistics Mailbox for auditing. You control which service entries are sent to be audited on the [Service Record Auditing Setup Page \[pg:1432\]](#). You can select to have the following entries sent for review:

- Service entered through the [VicNet module \[pg:1724\]](#) on the [Time Sheet tab \[pg:1460\]](#).
- Service entered through volunteers signing-in and signing-out of the [VicTouch module \[pg:1778\]](#).
- Service entered by a particular [System Operator \[pg:0065\]](#). Each operator who can enter service will be listed separately.
- Service entered for volunteers with incomplete [service mandates \[pg:1419\]](#).

In addition to the *Service Record Auditing Setup Page*, you can also send VicTouch service entries to be audited based on the following two options:

- You can select to audit the service entry if a volunteer forgets to sign-out of VicTouch on the [VicTouch Ground Rules \[pg:1511\]](#) page.
- You can select to audit the service entry if a volunteer clicks the *Not sure* button for their assignment on the [Assignment Selection Screen Setup \[pg:1515\]](#) page.

Any new service entries posted after you turn-on auditing will appear in the Volgistics mailbox. If you choose to audit service entries, you should check your Volgistics mailbox for new entries periodically, and before you print any month or year-end service reports.

To audit new service entries:

1. Choose Mailbox from the [menu \[pg:0215\]](#).
2. Click the "Service" tab. Any new service entries that require auditing will appear here. These entries also appear as usual on the [Service tab \[pg:1581\]](#) for the volunteers for whom they were entered.

You can change the sort order of the service entries awaiting auditing by clicking the Volunteer, Date, Assignment, or Hours links at the top of each column. Sorting by hours makes it easy to locate any entries that have very large hour values.

- If an entry is totally incorrect, click the "Delete" link in the right column. This action will delete the service entry
- from the Service tab of the volunteer's record and it will no longer show as needing to be audited. If you do
- not see the "Delete" link, your [System Operator \[pg:0065\]](#) rights do not include this ability. System Operator rights are set by each account's [Administrator \[pg:0052\]](#).



- If an entry just needs to be adjusted, click the "Edit" link and adjust the entry in the box that appears at the bottom of the tab. When you click the
- **Save**
- button, the adjusted record will be sent to the volunteer's Service tab and the entry will no longer show as needing to be audited. If you do not see the "Edit" link, your [System Operator \[pg:0065\]](#) rights do not include this ability. System Operator rights are set by each account's [Administrator \[pg:0052\]](#).

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## How to Setup Travel Time Merit Hours

Help topic 1210

Added or revised 12-23-2013

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If your organization has determined it wants to use [merit hours \[pg:1564\]](#) to add travel time to volunteer [service entries \[pg:1568\]](#), the first step will be to determine how you will handle the additional time given. Extra time can be given with a standard amount (such as 30 minutes) for all volunteers, or you can calculate up to six (6) zones and give extra time based on which zone the volunteer lives in.

For example, you may determine you will give volunteers 15, 30, 45, 60, 75 or 90 minutes extra depending on how far away they live from your facility. If you will be giving time based on the zone a volunteer lives in, create up to six (6) [Flags \[pg:0212\]](#) for the zones. Then place the appropriate Flag on the volunteer's record based on how long it will take them to travel to your facility. Note that you can add Flags to multiple volunteer records at once by using the [Tags \[pg:1529\]](#) feature. The *Add a Type or Flag entry to the tagged records* section of [help topic 2137 \[pg:1999\]](#) explains how to do this.

After you have decided how your organization will give travel time, you will need to enable merit hours if you are currently not using the merit hours feature. To do this:

1. Select [Setup \[pg:0887\]](#) from the menu.
2. Expand the *Service tracking* link.
3. Select *Merit hours*.
4. Check the box for *Use merit hours*.
5. Click the **Save** button.

You can optionally setup other merit hour rules as shown in [help topic 1101 \[pg:1409\]](#). The travel time merit hours will work whether or not you have other merit hour rules defined.

When you're ready to setup the travel time merit hours, click the *Travel Time* link on the *Merit hours setup* page. If you're not already on this page, follow steps 1 - 3 above.

### Apply travel time when volunteers

Setup the conditions for when you want travel time merit hours added to volunteer records. Note that with the exception of the *Serve anytime* setting, requiring more than one condition will require that all of the conditions are met before the travel time merit hours are applied. For example, if the conditions for *Adult Type* and *Arrive after 5:00 pm* are both checked, travel time merit hours will be given only for volunteers with the *Adult Type* who arrive after 5:00 pm.

Serve anytime (apply travel time to every service entry)

Check this box if you want travel time to apply to every service entry made for a volunteer.

If their Kind is

If you only want the merit hour rule to be applied to individual or [group \[pg:1909\]](#) volunteer records, check this box and select which records you want the rule to apply to. Leaving the box un-checked will make the rule apply to both individual *and* group records.

Have this Type

Check this box to apply travel time merit hours to only volunteers of a certain [Type \[pg:0212\]](#). Select the Type of volunteer records travel time merit hours should apply to from the dropdown list.

Arrive...

If travel time merit hours should apply to volunteers who begin serving before or after a certain time, check this box.

Choose "Before" if travel time merit hours should apply to volunteers arriving for service before a specified time. For example, if volunteers who work an early shift that starts before 6:00 am will be getting travel time, choose Arrive... "Before" and enter "6:00" am.

Choose "After" if travel time merit hours should apply to volunteers arriving for service after a specified time. For example, if volunteers who begin their service after 9:00 pm should receive travel time, select Arrive... "After" and enter "9:00" pm.

Depart...

If travel time merit hours should apply to volunteers who stop serving before or after a certain time, check this box.

Choose "Before" if travel time merit hours should apply to volunteers departing from service before a certain time. For example, if travel time should apply to volunteers who finish their shift before 8:00 am, select Depart... "Before" and enter "8:00" am.

Choose "After" if travel time merit hours should apply to volunteers departing from service after a specified time. For example, if travel time should apply to volunteers who finish their shift after 7:00 pm, choose Depart... "After" and enter "7:00" pm.

Serve more than XX hours and XX minutes in the same visit

If volunteers must work at least a minimum number of hours during a given shift in order for travel time merit hours to apply, choose this box. If, for example, a volunteer must serve at least 7.5 hours to qualify for travel time, check the box and enter "7" in the hours field and "30" in the minutes field.

Are in this Set

If travel time merit hours should apply to a group of volunteers designated by a [Set \[pg:0858\]](#), choose this option and select the appropriate Set from the dropdown list.

Serve in these Assignments...

If travel time merit hours should be applied when volunteers serve in certain [Assignments \[pg:0096\]](#), choose this option. Mark the boxes next to the names of all Assignments the travel time should apply to.

**Adjust their hours by...**

Adding XX hours and XX minutes for every qualifying visit

If a specific number of hours and/or minutes should be added to each service record that meets the characteristics defined above, choose this option. Then enter the appropriate amount of time to be added to each entry in the hours and/or minutes fields.

#### Base travel time on a volunteer's Flags

If you will base travel time merit hours on how far the volunteer travels and have created Flags for this, choose this option. Enter the hours and minutes you would like volunteers to be given and select the corresponding Flag from the dropdown list. *If a volunteer record has more than one of the Flags selected here, they will be given travel time based on whichever Flag gives them the highest total.*

#### **If a volunteer has more than one service entry in the same day**

##### If a volunteer has multiple service records within....

If you only want to give one travel time allocation when volunteers have two or more service entries on the same visit, choose this option. Enter the hours and minutes for the amount of time that must pass between the entries in order for them to be considered separate visits. By default, the hours and minutes are set at 1 hour and 30 minutes since that would be considered to be long break while at your facility.

##### Treat every service record as a separate visit

If you always want to give travel time for each service entry made for the volunteer, choose this option. The travel time will be given for every service entry the volunteer has on their record, even if they are on the same date.

#### **If a volunteer also qualifies for other merit hours**

If you have additional [merit hour rules \[pg:1409\]](#) setup, and a volunteer's service meets the requirements of the merit hours rules *and* the travel time rules--both will be used to figure the merit hours for the volunteer.

##### Base their other merit hours on their *actual time* only

Choose this option if you want the merit hours to be based on the actual time the volunteer served *before* the travel time merit hours are calculated.

##### Base their other merit hours on their actual time *plus* their travel time

Choose this option if you want the merit hours to be based on the actual time the volunteer served *and* the extra time given for travel time.

Click the

#### **Save**

button to save your travel time merit hour rule setup, or the

#### **Cancel**

button to close the page without saving your changes. If you no longer need the travel time merit hour rule, click the

#### **Clear this rule**

button. Please note that if you clear the travel time merit hour rule, it will not change any existing service entries made that originally applied the rule. However, if you open an entry to [edit the service \[pg:1574\]](#), the merit hour total will be adjusted so that the deleted rule no longer applies when the **Save** button is clicked.

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## Tracking Mandatory Service

Help topic 2156

Added or revised 12-16-2016

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**Question:** If we require volunteers to perform a certain number of hours, can we track their progress?

**Answer:** Volgistics includes features for tracking "mandatory service." Use these features if you challenge or require some or all of your volunteers to perform a certain amount of service in a certain period of time. The mandatory service feature makes it easy for you and your volunteers to see how much service they have performed toward their goal, and how much they have left to perform. It even lets you track recurrent challenges (for example, for students who have a new challenge every summer), and overlapping service obligations.

Enable the mandatory service features.

To set up Volgistics to use mandatory service:

1. Choose Setup from the [menu \[pg:0215\]](#) and then select *Service tracking*.
2. Click *Mandatory service*.
3. Check *Use the mandatory service features*. Then customize any of the setup options on the [Mandatory Service setup page \[pg:1405\]](#).
4. Click the Save button.

Enter the name(s) of your mandatory service program(s).

For example, a mandatory service program might be called "2017 Summer Volunteer" or "Community Service."

To enter a mandatory service program name:

1. Choose Setup from the [menu \[pg:0215\]](#).
2. Select *Field Options*.
3. Choose *Service tab*.
4. Under the *Mandatory service box* heading, select the Program field.
5. Use the *Add a new item* field to enter the name of the program.
6. Click the **Save** button.

Add mandatory service to volunteer records.

To enter the number of hours an individual volunteer is challenged or required to perform:

1. Choose Volunteers from the [menu \[pg:0215\]](#) and select a volunteer.
2. Click on their Service tab and scroll down to the *Mandatory Service* box.
3. Use the Add box to select the Program along with any applicable fields such as Starting Date, Due by date, hours, and other Service Measures required.
4. Click the **Save** button.

If a group of volunteers all have the same mandate with the same dates, hours required, etc., you can enter the information for the entire group at once by using the Tags menu. To do this:

1. [Tag the volunteer records \[pg:1538\]](#) that the mandate will apply to.
2. Select Tags from the menu.
3. Add the mandate to all of the tagged records as shown in the *Add a Mandate to all of the tagged records* section of [help topic 2137 \[pg:1999\]](#).

#### Collect service information for *mandated* volunteers.

You post or collect volunteer service information for *mandated* volunteers the same way you do for other volunteers. As service is posted for these volunteers, their Service tab will show you where they stand.

When a service entry will be applied to a mandate:

- When posting service from within Volgistics (with the [Post \[pg:1559\]](#) feature or [manually \[pg:1569\]](#) on a volunteer's Service tab):

If an "Apply to" value is selected, that service entry is applied to whichever mandatory service program the [System Operator \[pg:0065\]](#) selects from the "Apply to" dropdown list.

- When posting service through VicTouch:

If a volunteer has one unfulfilled service mandate and uses [VicTouch \[pg:1778\]](#) to sign-in and out when they serve, the VicTouch system will automatically apply that service to the mandate. If a volunteer has more than one unfulfilled mandate, the service entered through VicTouch will not be applied to any mandatory service program. In this case, a System Operator can later [edit the service record \[pg:1574\]](#) to make it apply to a specific program if necessary.

- When posting service through the VicNet Time Sheet tab:

If a volunteer has one unfulfilled service mandate and makes a service entry on the [Time Sheet tab \[pg:1460\]](#) of [VicNet \[pg:1724\]](#), the service will automatically be applied to that incomplete mandate. While volunteers will not see the name of the mandatory service program this service record was applied to on the Time Sheet tab, they can view their progress toward the service goal on the [My Service History tab \[pg:1465\]](#) in VicNet. The *Enable mandatory service progress chart* section below shows how to set this up.

If a volunteer has more than one unfulfilled service mandate, each of their incomplete mandatory service programs will be available from a dropdown list on the VicNet Time Sheet tab. Volunteers can select which mandate to apply their service to when making their service entry.

Enable mandatory service progress chart.

If you use [VicNet \[pg:1724\]](#), you can configure the [My Service History tab \[pg:1465\]](#) to display a chart showing their progress on mandates. An example of this appears below:

## Community Service Service Goal

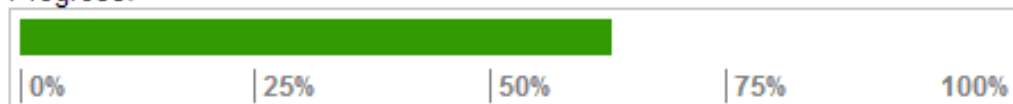
	Hours	Visits
Service goal:	250:00	50
Recorded so far:	145:06	35
Service remaining:	104:54	15

Started: 08-01-2013

Target date: 12-01-2013

Days left: 39

Progress:



To enable the mandatory service progress chart:

1. Select Setup from the [menu \[pg:0215\]](#).
2. Choose VicNet.
3. Select *Service History tab*.
4. Select Yes to show the progress chart.
5. Use the dropdown to select if you'd like the progress information to continue to be shown after the mandate is completed. You can select No or a monthly interval from 1 to 6 months.
6. Click the **Save** button.

The chart appears on the

*My Service History*

tab for every volunteer who has a service mandate while the mandate is incomplete and for the time frame selected after it is complete. Please see [help topic 1207 \[pg:1465\]](#) for more information on this chart.

FAQs about Mandatory Service.

**Q:** Does a mandatory service program *need* a "Starting date" and "Due by" date?

**A:** No. When a service mandate is given to a volunteer on the volunteer's Service tab, the "Starting date" and "Due by" fields are not required. If a System Operator does enter dates in either or both of these fields, this information is for reference only. That is, the dates entered in these fields will not affect whether or not service can or will be applied to a mandatory service program.

**Q:** Why are the "Completed" checkbox and the "Completed on" field disabled when I add or edit a mandate for a volunteer?

**A:**

The "Completed" checkbox and the "Completed on" field will be disabled when the system has been configured to manage mandate completion automatically. This setup option can be viewed or changed on the [Mandatory Service Setup \[pg:1405\]](#) page.

**Q:** How should I deal with annual or recurring mandatory programs?

**A:** If your organization has a mandatory service program that is re-introduced in successive years or time periods (e.g. a Summer Intern program), be sure to give the mandatory service programs unique names. That is, you might enter a "Summer Intern 2017" program, a "Summer Intern 2018" program, and so on.

This can become significant if, for example, a volunteer has not met the service requirements of the first year of the program, but continues to participate in the Summer Intern program in future years. In this case, this person would have multiple unfulfilled service mandates, all within the Summer Intern program. If each service mandate given to this volunteer were called simply "Summer Intern," it would be difficult to distinguish which program should be selected when posting hours at VicNet or within Volgistics.

Note that if you choose not to have the system automatically manage mandatory service completion for you (see the *Enable the mandatory service features* section above), you could mark the mandatory service program from a previous year or season "Complete" for volunteers--even if they have not completed the required service. When this is done, the program will no longer appear as an option for service to be applied to at VicNet or in Volgistics.

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## How do I track volunteer mileage?

Help topic 2271

Added or revised 02-10-2017

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You can optionally track and report the number of miles (or kilometers) volunteers drive using a mileage service measure (you can track up to 14 different measures of volunteer service in Volgistics). If you also track volunteer hours, you can enter a volunteer's mileage along with her or his hours.

To setup a service measure for tracking mileage:

1. Choose [Setup \[pg:0887\]](#) from the menu.
2. Select *Service tracking*.
3. Select *Service measures*.
4. Click on the first available measure (e.g. "Measure 1 (available)").

5. Make the following entries on the service measure page:

Name

Enter "Mileage" (or "Kilometers")

Format

Select *Whole number (0)* if you choose not to track fractional miles. If you want to track fractional miles (e.g. 2.5 miles or 3.25 miles) choose *One decimal (0.0)* or *Two decimals (0.00)*.

Default value

You can leave this field blank unless you want a set number of miles to appear by default.

Require an entry

Choose *No* if some volunteers will have zero miles to report. Choose *Yes* only if there will always be miles to record on every service entry.

Please note that this setting only applies when [System Operators \[pg:0065\]](#) enter volunteer service information. If your volunteers will enter their own service through the [Time Sheet tab \[pg:1460\]](#) in [VicNet \[pg:1724\]](#), the *Require an entry* setting will not make a difference even if it is set to *Yes*.

Volunteer view

You can select the wording that will appear when your volunteers enter their service information through the [Time Sheet tab \[pg:1460\]](#) in [VicNet \[pg:1724\]](#). You can choose between *How Much* and then the service measure's name, *How many* and then the service measure's name, or just show the service measure's name.

Include as a grid column

Check this if you want to the Mileage field to appear in the Service box on the [Service tab \[pg:1581\]](#) of the volunteer records.

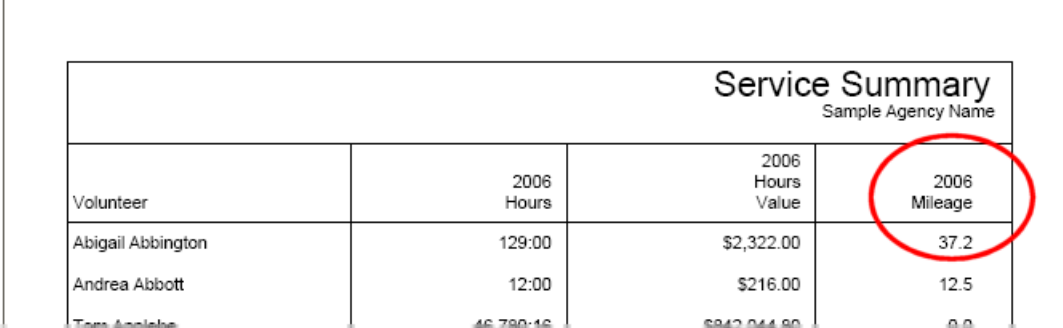
6. Click the **Save** button.

Now, each time you make a service entry, the *Mileage* field will appear for you to record the number of miles driven.

The screenshot shows a web form titled "Service" with a sub-header "Add". The form contains several input fields: "Assignment" (a dropdown menu), "Month" (a dropdown menu set to "July"), "Year" (a dropdown menu set to "2006"), "Hours" (a text input field set to "0:00"), and "Mileage" (a text input field set to "0.0"). The "Mileage" field is circled in red. At the bottom right of the form are "Save" and "Cancel" buttons.



You can include the Mileage field on any Service Details or Service Summary report you create [pg:0467] by selecting the *Mileage* field from the Fields page when you create the new report.



Service Summary			
Sample Agency Name			
Volunteer	2006 Hours	2006 Hours Value	2006 Mileage
Abigail Abbington	129:00	\$2,322.00	37.2
Andrea Abbott	12:00	\$216.00	12.5
Tom Apple	46 790:16	\$942 044.80	9.9

### Related help

[Help Topic 1016 \[pg:1557\]](#) - Service Measures

[Help Topic 1017 \[pg:1406\]](#) - How to Setup a Service Measure

[Help Topic 1219 \[pg:0435\]](#) - How to Make a Tax Report for Your Volunteers

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## Tracking Volunteer Absences

Help topic 2275

Added or revised 10-04-2016

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You can optionally use Volgistics to keep track of the number of times volunteers are absent. In organizations that depend on regular volunteer participation, a volunteer may be considered *absent* if they fail to serve as scheduled. Tracking the number of times volunteers are absent is often an important measure of volunteer performance in these organizations.

This topic explains how to initially setup a Volgistics service measure for tracking absences; how to record an absence; how to report absences; and how to use Sets to find volunteers with a certain number of absences.

### How to setup a service measure for tracking absences

If you would like to track absences in Volgistics, start by setting-up an *Absences* service measure.

1. Choose [Setup \[pg:0887\]](#) from the [menu \[pg:0215\]](#).
2. Select *Service tracking*.
3. Select *Service measures*.
4. If you do not already have a service measure for tracking absences, click on the next available service measure (e.g. "Measure 1 (available)"). If you already have a service measure for tracking absences (e.g. "Measure 1 (Absences)"), click on it.
5. Configure the Service measure page as shown here:

## Service measure

### Measure 1

Name:   
Format:  ▾  
Default value:   
Require an entry:  ▾  
Volunteer view:  ▾  
 Include as a grid column

[Help](#)

6. Click the **Save** button.

You are now ready to start tracking absences.

## How to record absences

There are several ways you can record volunteer absences, and you can use whichever method is the easiest for your organization.

### Record an individual volunteer absence

To record a single absence for an individual volunteer:

1. Choose Volunteers from the [menu \[pg:0215\]](#).
2. [Locate the record \[pg:1982\]](#) for the volunteer who was absent.
3. Click on the Service tab for the selected volunteer.
4. Using the Add box in the Service section, optionally select the assignment the volunteer was absent for if you track assignments. Enter the date or month of the absence, and then enter "1" in the Absence field. Leave the Hours field set to zero, the time fields blank if you use them, and set any other service measures to zero if they do not apply.

### Add

Assignment:  ▾

Date:   From time:   ▾

To time:   ▾

Hours:

Visits:  Absences:

5. Click the **Save** button.

### Record absences using the Post feature

If you use the Post feature to post volunteer service, you can optionally record absences while you're posting volunteer service.

1. Choose Post from the [menu \[pg:0215\]](#).
2. Choose who you want to post service for as usual, and then click the **Continue** button.
3. Choose how you want the service entry fields to appear in this batch. Under *Absences field*, select "Let me enter Absences on each entry."
4. Click the **Start posting** button.
5. The Absences field will appear along with any other fields you select for this batch, as shown below. If a volunteer was not absent during the period for which you are posting service, simply leave the Absences field blank for that volunteer. If a volunteer did have one or more absences during the period for which you are posting service, enter their number of absences in the Absences field.

## Post

Volunteer	Service	Skip
Bailey, Harry	Assignment: <input type="text"/> <input type="button" value="v"/> Date: <input type="text"/> <input type="button" value="c"/> Hours: <input type="text"/> <b>Absences: <input type="text"/></b>	<input type="checkbox"/>
Bailey, Mary	Assignment: <input type="text"/> <input type="button" value="v"/> Date: <input type="text"/> <input type="button" value="c"/> Hours: <input type="text"/> Absences: <input type="text"/>	<input type="checkbox"/>
Rollard		

6. Finish posting service as usual. Any absences you post are recorded, and they will appear on the Service tab in the volunteer's record.

### Record absences using the Post feature to post service from the schedule

If you use the Post feature to post volunteer service, and you post hours from the schedule, record an absence by removing the *From time* and *To time* values and entering "1" in the Absence field, as shown here:

## Post

Volunteer Service		Skip
Applebe, Tom	Assignment: Info Desk [Sample Agency Name\Administration]	<input type="checkbox"/>
	From time: <input type="text"/>	
	To time: <input type="text"/>	
	Absences: <input type="text" value="1"/>	
Ross, Benjamin	Assignment: Info Desk [Sample Agency Name\Administration]	<input type="checkbox"/>
	From time: 10:00 p	
	To time: 3:00 a	
	Absences: <input type="text"/>	

This will cause the service entry to include zero hours and 1 absence.

### How to create a report that shows absences

You can include the Absences service measure on any new report you [create \[pg:0467\]](#) using the [Service Detail \[pg:0560\]](#), [Service Summary \[pg:0580\]](#), or [Volunteer List \[pg:0692\]](#) report formats.

To create a simple service summary report by volunteer that includes the Absences field:

1. Choose Print from the [menu \[pg:0215\]](#).
2. Select *Service summary*.
3. Click *Create a new service summary report*.
4. On the Options page, change *Organize this report by* to Volunteer and then click the **Next** button.

### Options

Organize this report by:  Volunteer  Site  Site & Place  Site, Place & Assignment  Type

Summarize  Fiscal year

5. On the Fields page, check the *Absences* checkbox and then click the **Next** button.

**Fields** Help Back Next Cancel

Choose the fields you want to appear in this report.

For each calendar year list...

- Hours
- Hours value
- Hours FTE comparison
- Absences
- Absences value
- Mileage
- Mileage value
- Total estimated volunteer count

6. On the Page design page, click the **Next** button.

7. On the Include page, select the time period you want to include in the report and then click the **Next** button.

8. On the Save page, optionally change the name of the report, and then click the **Save and Print** button. When the Include page appears again, click the **Start printing** button.

An example of the report appears below. This is just one example of how you might report absences. You can include absences data on any of the report formats listed above, and further customize these reports to suit your needs.

<b>Service Summary</b>		
Sample Agency Name		
Volunteer	2006 Hours	2006 Absences
Harry Bailey	157:45	1
Violet Bick	8:00	0
Janice Clark	106:45	2

### How to use a Set to find volunteers with a certain number of absences

If you track volunteer absences, you may want to monitor for volunteers who have more than a certain number of absences during a certain period of time. For example, 4 or more absences in 6 months. You can do this using a [Set \[pg:0858\]](#).

To create this Set:

1. Choose Sets from the [menu \[pg:0215\]](#).

2. Click the **Create a new set** button.

3. On the *Define a new set* page, enter a name for the Set, select *Their service* from the dropdown list, and then click the **Go** button.

**Define a new set**

What would you like to call this set?

Enter any name that describes this set of volunteers  
 (e.g. 'Over 65' or 'Available weekends')

Include volunteers in this set based on

Select what it is the volunteers in this set will all  
 have in common and then click the Go button.

[Help](#)

4. Configure the *Their Service* Set rule as shown below. In this example, the Set finds volunteers with four or more absences in 6 months. You can set any conditions you want for this rule (such as 6 or more absences between two dates, or 5 or more absences this fiscal year).

**Their Service** Rule

They have...

At least  Absences in

At least  hours between  
 the beginning of   and the end of

At least  Life hours

They do not have any  recorded

Only count service in

[Help](#)

5. Click the **Finished** button.

Once you create this Set you can easily [view \[pg:0861\]](#) or [print \[pg:0863\]](#) a list of the volunteers in the Set.

---

## Customizing the Fields that Appear for Manual Hour Entries

Help topic 2325

Added or revised 10-07-2016

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If you track the number of hours volunteers serve, and you enter some or all of your hour records manually (as opposed to collecting them through VicNet or VicTouch), you can tailor the manual hour entry record to best match the way you enter hours.

To do this:

1. Choose Setup from the [menu \[pg:0215\]](#).
2. Select 'Service tracking.'
3. Select 'Ground rules.'
4. Under 'Manual volunteer service entries' choose the option that best describes the way you want to post volunteer hours manually.
5. Click the Save button.

The effect each of these options has on the fields you'll see when you post hours manually is shown here:

If you choose...

**"We always make manual service entries for one month at a time."**

Manual hour records will look like this...

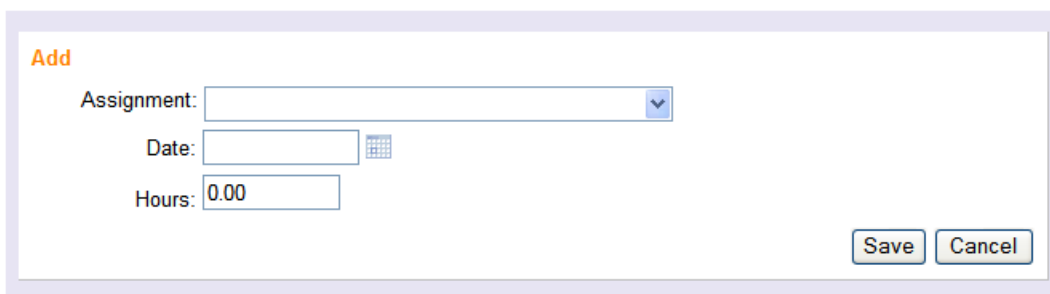


The screenshot shows a form titled "Add" with the following fields: "Assignment:" (a dropdown menu), "Month:" (a dropdown menu set to "October") and "2007" (a year dropdown menu), and "Hours:" (a text input field containing "0.00"). At the bottom right, there are "Save" and "Cancel" buttons.

If you choose...

**"We always make manual service entries for one day at a time, and we do NOT want to enter the volunteer's start and stop times."**

Manual hour records will look like this...



The screenshot shows a form titled "Add" with the following fields: "Assignment:" (a dropdown menu), "Date:" (a text input field with a calendar icon to its right), and "Hours:" (a text input field containing "0.00"). At the bottom right, there are "Save" and "Cancel" buttons.

If you choose...

**"We always make manual service entries for one day at a time, and we DO want to enter the volunteer's start and stop times."**

Manual hour records will look like this...

The screenshot shows a web form titled "Add" with the following fields: "Assignment:" (a dropdown menu), "Date:" (a text box with a calendar icon), "From time:" (a text box with a dropdown menu for "am"), and "To time:" (a text box with a dropdown menu for "pm"). Below these is an "Hours:" field containing "0.00". At the bottom right are "Save" and "Cancel" buttons.

If you choose...

**"We want to make manual service entries with a beginning and an ending date, and we do NOT want to enter the volunteer's start and stop times."**

Manual hour records will look like this...

The screenshot shows a web form titled "Add" with the following fields: "Assignment:" (a dropdown menu), "From date:" (a text box with a calendar icon), "To date:" (a text box with a calendar icon), and "Hours:" (a text box containing "0.00"). At the bottom right are "Save" and "Cancel" buttons.

If you choose...

**"We want to make manual service entries with a beginning and an ending date, and we DO want to enter the volunteer's start and stop times."**

Manual hour records will look like this...



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## Service Record Auditing Setup Page

Help topic 2489

Added or revised 03-11-2014

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You can use the Service Record Auditing Setup page to configure the kinds of [service entries \[pg:1568\]](#) you would like to appear on the Service tab in your Volgistics Mailbox. To get to the Auditing setup page, choose Setup from the [menu \[pg:0215\]](#), click on *Service tracking*, and then choose *Service record auditing*.

### Choose the kinds of service entries you want to audit:

Select one or more of the options below to determine which service entries should be sent to the Service tab in your Volgistics Mailbox for auditing:

- Service entered through the [VicNet module \[pg:1724\]](#) on the [Time Sheet tab \[pg:1460\]](#).
- Service entered through volunteers signing-in and signing-out of the [VicTouch module \[pg:1778\]](#).
- Service entered by a particular [System Operator \[pg:0065\]](#). Each operator who can enter service will be listed separately.
- Service entered for volunteers with incomplete [service mandates \[pg:1419\]](#).

You can also send VicTouch service entries to be audited based on the following two options:

- You can select to audit the service entry if a volunteer forgets to sign-out of VicTouch on the [VicTouch Ground Rules \[pg:1511\]](#) page.
- You can select to audit the service entry if a volunteer clicks the *Not sure* button for their assignment on the [Assignment Selection Screen Setup \[pg:1515\]](#) page.

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## Service Posting Setup Page

Help topic 2490

Added or revised 11-25-2008

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You can use the Service Posting setup page to configure the basic use of Volgistics' "Post" feature. To get to the Service Posting setup page, choose Setup from the [menu \[pg:0215\]](#), click on *Service tracking*, and then choose *Service Posting*.

### Assignment Role

Use the options in this section of the page to choose which volunteers – based on their Roles in an Assignment – should appear on the [Post page \[pg:1559\]](#) when posting hours for an individual Assignment. You can select as many choices as you would like.

### Volunteers per page

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# System Operator Page

Help topic 1011

Added or revised 03-31-2017

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In Volgistics, [System Operators \[pg:0065\]](#) are the users who login to the system with the Login link located at [www.volgistics.com](http://www.volgistics.com). The System Operator page is used to [add a new System Operator \[pg:1440\]](#), change the settings for an existing System Operator, or [delete a System Operator \[pg:1441\]](#).

If you're not already on the System Operator page, you can get there by choosing Setup from the [menu \[pg:0215\]](#), selecting *System Operators* and then clicking the *Create a new operator* link or the link to an existing System Operator.

This help topic gives details on each field on the page. You can navigate directly to a specific item in the help topic by clicking the link in the Contents box.

## Contents

### Basic Operator Information

Last Name

First Name

Email address

Phone number

Password & Confirm password

Operator must change their password when they login next

Time zone

Date of Last Activity

### Rights

Block this operator's access to the system

Site

User level

Computers

This operator may have access to

This operator is allowed to

Email

Reply-to address

Email signature block

### Basic Operator Information

#### Last name

Enter this operator's last name

#### First name

Enter this operator's first name

#### Email address

Enter this operator's email address. This is the email address this System Operator will enter when they [login \[pg:0220\]](#) to Volgistics.

### Phone number


Optionally enter a telephone number for this System Operator.

### Password & Confirm password

Enter the password this operator will use when they [login \[pg:0220\]](#) to Volgistics. Passwords are case sensitive, can be up to 30 characters long, contain lower and upper case letters, numbers, and special characters such as \$ & or ?.

For security purposes, you do not see the password as you enter it. To be sure you've entered the password correctly, enter the same password in the *Password* and the *Confirm password* fields. Volgistics will check to be sure you entered it the same way in both of these fields.

If the *Caps Lock* key on your keyboard is on, you will receive a warning message like the one below when you start to type in the password. In this case, press the *Caps Lock* key on your keyboard to turn this off before continuing.



The screenshot shows a form titled "New System Operator" with the following fields and options:

- Last name: Lawson
- First name: Brenda
- Email address: b.lawson@volunteers.org
- Phone number: (555) 123-4567
- Password: [blacked out]
- Confirm password: [blacked out]
- Operator must change their password when they login next
- Time zone: (GMT-05:00) Eastern Time (US & Canada)

A warning box on the right side of the form displays a yellow exclamation mark icon and the text "Caps Lock is on".

If you enter a password that does not meet the password strength rules setup on the [System Operator Ground Rules \[pg:1442\]](#) page, you will see a message like the one below when you attempt to save the record. The message lists the password strength rules currently in place. You will need to re-enter a password that meets each rule in order to be able to save it.



## Password does not meet the password strength rules for your account.

The password you entered does not meet one of the following password rules. Passwords must:

- Be between 8 and 30 characters long.
- Include both letter and number characters.
- Include some upper and some lower case letters.
- Include some characters that are not letters or numbers, such as !#\$% or ?.
- Must not contain any space characters.
- Be different from the current password.

Enter a new password that conforms to these rules, and then click the Save button again.

### Operator must change their password when they login next

Check this box if you want to require this System Operator to choose a new Volgistics password the next time they login. Checking this box when you create a new System Operator, or update the password strength rules, forces the System Operator to select a password other than the password assigned to them when they login the next time.

### Time zone

Select the time zone for the location where this System Operator is based. In many organizations, everyone who uses Volgistics works from the same time zone. However, in some national and international organizations, some operators may be located in distant locations and time zones. This setting allows Volgistics to localize date and time values for individual System Operators.

If your organization uses the [VicTouch \[pg:1778\]](#) module, this setting also controls the times that will appear when the operator views the [Who's Here \[pg:1772\]](#) page.

### Date of Last Activity

This field tracks when the operator logged into the account last. It can be useful to note this to see if the operator's record is necessary in your account. If the operator is not logging in regularly, you can [delete the System Operator \[pg:1441\]](#) and then reduce your account's [service level \[pg:0719\]](#). Or, you can delete the record and then create a new record for someone who will use it.

## Rights

### Block this operator's access to the system

Check this checkbox to temporarily prevent this System Operator from being able to login to Volgistics. As long as this checkbox is checked, no one can access Volgistics using this operator's credentials. Once this checkbox is un-checked, this System Operator can access the system with the Rights you select for them.

## More Help

This help topic explains how to setup or change an operator's record to limit access to the system or the actions the operator can perform. You may also find [help topic 2028 \[pg:0053\]](#) useful because it gives examples of how the changes will appear for the operator, as well as more information on how to configure your account to limit operator access.

### Site

If your organization has volunteer offices at multiple Sites, and you want to limit this operator's access to just the volunteers assigned to one individual Site, select that Site here. Otherwise, select *All sites* here. Volgistics refers to an operator with access to just one Site as a [Site-Level Operator \[pg:1442\]](#).

See [Site Level Access \[pg:0092\]](#) for more information about this Volgistics feature.

### User level

User levels determine the degree of access a System Operator has in the Volgistics system. Every System Operator has one of the three following *user levels* in Volgistics:

- Basic User
- Power User
- Volgistics Administrator

By default,

*Basic users*

and

*Power users*

have the same level of access to the system; however, you can tailor what *Power users* and *Basic users* are allowed to do in Volgistics by granting or restricting specific [tab rights \[pg:1012\]](#) and/or [field rights \[pg:0957\]](#) to these user levels.

*Basic User*

. Choose

*Basic User*

for operators who will have basic access to Volgistics. These are typically people who assist with data entry, but who do not perform many reporting or management functions. You can customize which tabs *Basic Users* can see on the [Tab Rights page \[pg:0933\]](#) and which fields they can see or change in the [Field Properties \[pg:0957\]](#) window. Please note that only *Volgistics Administrators* have access to the Volgistics Store with their login credentials. However, you can give a *Basic User* access by giving them the [accounting access code \[pg:0728\]](#) for your account.

*Power User*

. Choose

## Power User

for operators who will be extensive users of the Volgistics system. These are typically people who not only assist with data entry, but who also perform reporting or management functions. You can customize which tabs *Power Users* can see on the [Tab Rights page \[pg:0933\]](#) and which fields they can see or change in the [Field Properties \[pg:0957\]](#) window. Please note that only *Volgistics Administrators* have access to the Volgistics Store with their login credentials. However, you can give a *Power User* access by giving them the [accounting access code \[pg:0728\]](#) for your account.

*Volgistics Administrator*. [Volgistics Administrators \[pg:0052\]](#) have access to all of your account's administrative controls so this user level should only be selected for the operator (or operators) your organization has designated as the Volgistics Administrator. If you do not want to give an individual complete access to your database, you should make them a *Power user* or *Basic user*. You can customize which tabs *Volgistics Administrators* can see on the [Tab Rights page \[pg:0933\]](#) and which fields they can see or change in the [Field Properties \[pg:0957\]](#) window.

## Computers

If your organization's internal network has a shared Internet connection that uses a fixed IP address (so all of the computers on the internal network use the same public IP address on the Internet) you can create a System Operator who is permitted to access Volgistics only when they use a computer on your internal network. These operators would not be able to access the system from any computers outside of your internal network.

*Login allowed from any computer on the Internet*. Choose this option if this System Operator is allowed to access Volgistics from any computer on the Internet or if there is not a fixed IP address to which this operator's access can be restricted.

When this option is selected this System Operator may access Volgistics from any computer on the Internet. This is the default setting.

*Login allowed only from computers that use one of these Internet addresses*. Choose this option if your organization has Internet access through a shared network or broadband connection that has a static (or fixed) public IP address, and you want this System Operator to use Volgistics only from computers on your internal network. An example of when this might be used is if you have a System Operator who only enters data while they are in your office--and you do not want them to be able to login to the system from a computer at their home or other site.

If you are not sure if your organization has Internet access that uses a fixed IP address, contact your organization's computer support department or ISP. If your organization does have a fixed public IP address for Internet access, your computer support department or ISP can tell you what that IP address is.

*Permitted IP address*. Enter up to two public IP addresses here. This System Operator will be permitted to login only when they access the system from a computer using either of these two addresses. If you have just one fixed IP address enter zeros for the second permitted IP address.

You can permit access from an entire Class A, B, or C network by entering a zero for the appropriate IP address octets. For example, to permit access from any IP address in the range 192.168.1.1 to 192.168.1.255 you would enter "192.168.1.0."

### Caution

For security purposes, the Volgistics Team cannot remove this restriction from a System Operator under any conditions. If you choose to impose this restriction on a System Operator, only a *Volgistics Administrator* from your organization can remove this restriction or change the permitted IP addresses.

To prevent potential *lock-out* conditions, this restriction cannot be placed on System Operators who are Volgistics Administrators. Volgistics Administrators can always login to the system from any Internet connected

computer.

### This operator may have access to...

Each of these checkboxes corresponds to a Volgistics [menu \[pg:0215\]](#) item, and they allow you to control which menu options *this* System Operator can see and use. Check the menu items you want this operator to be able to use, and un-check any you do not want this operator to be able to use. For example, if this System Operator is someone who would not normally use the Tickler menu option, you can remove the check from the Tickler menu item.

In most cases, it's best to check the [Setup \[pg:0887\]](#) menu option only for operators whose access level you've set to *Volgistics Administrators*. However, this is not required so if you may check this option for *Power Users* and *Basic Users* if it fits your needs.

### This operator is allowed to...

Choose the privileges appropriate for this operator by placing a check mark next to the privileges you want this operator to have, and removing the checkmark from any you do not want this operator to have.

*Change their password (if it has not expired)*. You should normally give all operators this right, since allowing operators to change their passwords on a regular basis can improve security. If you do not want this operator to be able to change their password for any reason, un-check this item.

*Add new volunteer records*. When checked, this operator is allowed to [create \[pg:1877\]](#) new volunteer records. If you do not want this operator to be able to do this, un-check this item.

*Delete and restore volunteer records*. When checked, this operator is allowed to [delete \[pg:2016\]](#) complete volunteer records, [combine \[pg:1884\]](#) volunteer records, and [restore \[pg:1888\]](#) deleted records. If you do not want this operator to be able to do these things, un-check this item.

*Archive and restore volunteer records*. When checked, this operator is allowed to [archive \[pg:1819\]](#) volunteer records as well as [restore \[pg:1852\]](#) archived records. If you do not want this operator to be able to do this, un-check this item.

*Change or delete existing service records*. If checked, this operator can [modify or delete service records \[pg:1574\]](#) (hour entries) that were entered previously. If not checked, this operator cannot make changes to, or delete, service (hour) records entered previously. However, they can still make new service entries.

*Add new assignments*. If checked, this operator can [create new Assignments \[pg:0106\]](#) on the Assignments page. If this box is not checked, this operator cannot add a new Assignment to the system.

*Combine, move or delete assignments*. When checked, this operator is able to [combine, move, and delete \[pg:0112\]](#) assignment records. If this operator should not be permitted to do any of these things, un-check this box.

*Add or change schedule openings and schedule setup*. When checked, this operator can add or change schedule openings on your volunteer schedules, as well as add or change volunteer entries on schedules.

When un-checked, this operator can still add or change volunteer entries on schedules, but they cannot [add new schedule openings \[pg:0776\]](#) or make changes to existing schedule openings. It's a good idea to un-check this option for people who will help manage volunteer schedules, but who are not responsible for initially establishing the schedules.

### Send email and text messages

. Un-check this option if you do not want this operator to be able to use Volgistics to [send email \[pg:0404\]](#) and [text messages \[pg:0343\]](#) to volunteers or [Coordinators \[pg:0163\]](#). When checked, this operator can send email and text messages to volunteers and Coordinators.

**Create or modify reports.** When checked, this operator can [create new Volgistics reports \[pg:0467\]](#) and modify existing reports. When this privilege is not checked, this operator can still print existing reports, but they cannot create new reports or change existing reports.

**See Account Statistics on Welcome page.** When checked, this operator will see the [Account Statistics \[pg:0028\]](#) box on the Welcome page. The Account Statistics box displays summary information such as the number of volunteers and amount of service performed overall in your organization. The Welcome page is what first appears when you login to Volgistics and when you choose *Welcome* from the [menu \[pg:0215\]](#).

**See Birthday Lists on the Welcome page.** If you use the [birthday list \[pg:1385\]](#) feature, checking this box causes this System Operator to see the current birthday list on the Welcome page. If this box is not selected, or you do not use the birthday list feature, this System Operator will not see the birthday list on the Welcome page. The Welcome page is what first appears when you login to Volgistics and when you choose 'Welcome' from the [menu \[pg:0215\]](#).

**See information popup icons (blue circles with 'i' inside).** When this box is checked, this operator will see the information icons that appear throughout the Volgistics account. An example of what the operator would see if they place their cursor over the information icon by the Status field on the Core tab of the volunteer's record appears below:



The information icons are useful to new operators because they give information on how the fields and features are used, and often have links to help topics about the item. If the operator is familiar with the system and does not want to see the information icons, un-check this box.



See [session expiration warnings](#)

. Volgistics includes a security feature that closes sessions automatically when approximately 60 minutes of inactivity occur. You can optionally disable the alert messages warning that the session will be expiring soon.

*This will not prevent the session from expiring. It will only prevent the alert messages from appearing for the operator.* You can learn more about the feature that closes inactive sessions [here \[pg:1589\]](#).

## Email

### Reply-to address

Use this optional text field if email messages sent by this System Operator should contain a [reply-to \[pg:0398\]](#) address other than their login name email address (provided in the *Email address* field above). When this System Operator sends email, the address entered here will be used as the reply-to address. If this field is left blank the reply-to address will be the System Operator's email address.

### Email signature block

Each System Operator can customize his or her own email signature block, which automatically appears at the bottom of all email messages he or she sends through Volgistics. The text entered here will be used as this user's default email signature block. When this System Operator composes a new email message in Volgistics, this default signature will appear, but there will be an option to edit the signature for that specific message.

Click **Save** to save changes you've made to a System Operator record, **Cancel** to exit without saving your changes, or **Delete this operator** to delete the selected System Operator record.

---

## Adding a New System Operator

Help topic 2026

Added or revised 04-03-2017

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[System Operators \[pg:0065\]](#) are the people you authorize to use Volgistics.

You must be a [Volgistics Administrator \[pg:0052\]](#) to add new System Operators. The number of System Operators you can have is limited by your account's [Service Level \[pg:0719\]](#).

To add a new System Operator:

1. Choose [Setup \[pg:0887\]](#) from the [menu \[pg:0215\]](#).
2. Click *System Operators*.
3. Click *Create a new operator*.
4. Enter the information for the operator. It is also a good practice to check the box to require new operators to set a different password the first time they login. You can set password strength rules to prevent operators from picking an easy to guess password on the [System Operator Ground Rules \[pg:1442\]](#) page.

5. Set the permissions for the operator. Help topic 1011 "[System Operator Page](#)" [pg:1433] has information on the settings on this page. You may also find help topic 2028 "[How to Limit Operator Rights or Access](#)" [pg:0053] useful.

6. Click the **Save** button when you're done setting up the operator.

Let the new person know the account number, plus the email address and password you entered, so they can [login](#) [pg:0220] to the Volgistics account. If the new operator has trouble accessing the account, double check that the email address and password being entered match the email address and password on their record exactly.

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## Deleting a System Operator

Help topic 2029

Added or revised 03-27-2017

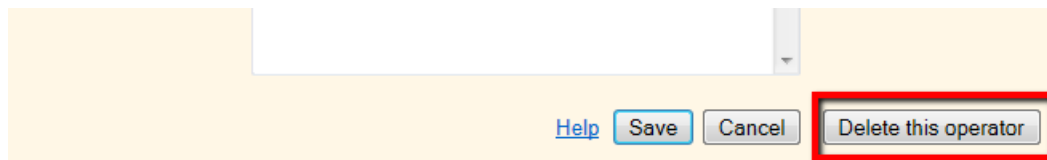
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System Operators are the people you authorize to use Volgistics.

If someone you previously established as a [System Operator](#) [pg:0065] leaves your organization or no longer uses Volgistics, you should delete their System Operator record. Deleting unused System Operator records is not only a good security practice, but it may enable you to reduce your Volgistics [Service Level](#) [pg:0719], or make room for other System Operators.

To delete a System Operator:

1. Choose Setup from the [menu](#) [pg:0215].
2. Expand the *System Operator* link.
3. Click the name of the operator whose record you want to delete. If the name does not appear, the operator attempting the change has a Site selected on his or her record that does not match the other operator's Site. In this case, the change will need to be made by a System Operator that has access to "All Sites." [Help topic 2035](#) [pg:0092] explains more about how this works.
4. Click the **Delete this operator** button at the bottom right of the page then verify that you want to complete the action by clicking the **OK** button in the pop up window.



If the **Delete this operator** button does not appear as shown above, this operator is the only [Volgistics Administrator](#) [pg:0052] for your account. Because accounts must have at least one Administrator, you will need to do one of two things. One option is to change an existing operator's User Level by following steps 1 – 3 above for the operator you want to change. Then select "Volgistics Administrator" from the dropdown next to User level and click the

### Save

button to update the setting. Another option is to replace this operator's information with a new Administrator's

information. [Help topic 2535 \[pg:0084\]](#) shows how to do this.

### Related help

[Help Topic 1020 \[pg:0024\]](#) - What to do when a System Operator leaves your Organization

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## Site-Level Operator

Help topic 2204

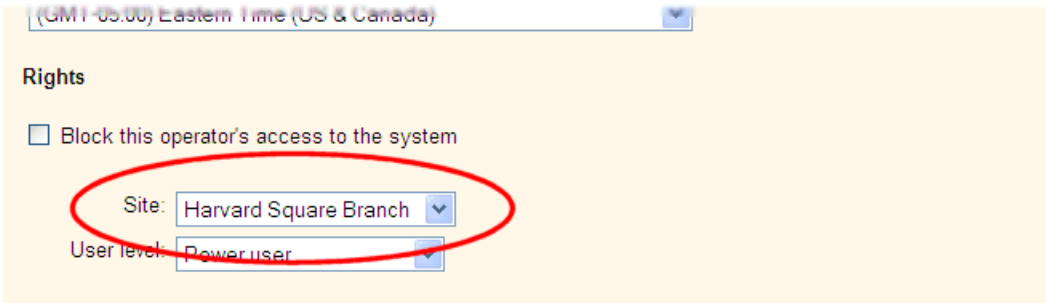
Added or revised 04-03-2017

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A Site Level Operator is a Volgistics [System Operator \[pg:0065\]](#) who is given access to just one [Site \[pg:0096\]](#) using the [Site Level Access \[pg:0092\]](#) features.

When a Site Level Operator logs-in to Volgistics, they only 'see' the volunteers for their Site. This is ideal for organizations that have volunteer leaders at different remote Sites (such as branch or county offices) or for different volunteer groups within the same organization (such as Adult and Junior volunteer programs).

You setup System Operators to have Site Level Access on the [System Operator Page \[pg:1433\]](#) by choosing their Site from the Site field, as shown here:



The screenshot shows a web interface for configuring a System Operator. At the top, there is a time zone dropdown menu set to "(GMT-05:00) Eastern Time (US & Canada)". Below this is a section titled "Rights" containing a checkbox labeled "Block this operator's access to the system". Underneath the checkbox are two dropdown menus: "Site:" with "Harvard Square Branch" selected, and "User level:" with "Power user" selected. A red oval highlights both the "Site:" and "User level:" dropdown menus.

While Site Level Access provides great convenience, it may not (and is not intended to) provide a level of security in which operators at one Site could never discover any information about volunteers from another Site in the same Volgistics account. For example, when a volunteer serves at more than one Site in the same Volgistics account, their record is shared between those Sites.

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## System Operator Ground Rules

Help topic 2236

Added or revised 04-26-2016

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Use the System Operator Ground Rules page to set your organization's password policies for Volgistics [System Operators \[pg:0065\]](#). If you are not already on the System Operator Ground Rules page, you can there by selecting [Setup \[pg:0887\]](#) from the [menu \[pg:0215\]](#), clicking "System Operators," and then choosing "Ground Rules."

The settings on this page affect the passwords used by Volgistics System Operators. They do not affect passwords used by volunteers or [coordinators \[pg:0163\]](#) to access VicNet. The settings for VicNet passwords are found on the [VicNet Ground Rules \[pg:1447\]](#) page.

## **Password strength rules**

### Must be at least x characters long

Use this control to specify a minimum password length for Volgistics System Operator passwords. Choose any number between 6 and 30. For example, if you want to require that Volgistics System Operator passwords be at least 12 characters long, select 12 here. The system will prevent System Operators from choosing a password that is shorter than this.

Generally, longer passwords provide better security.

### Must contain a combination of letters and numbers

When you check this box, new Volgistics System Operator passwords must contain some combination of letter characters (a through z) and number characters (0 through 9). When this box is not checked, new Volgistics System Operator passwords may contain just letter characters, just number characters, or some combination of both.

Generally, passwords that contain a combination of letters and numbers provide better security.

### Must contain a combination of lower case and uppercase letters

Check this box if you want to require that passwords contain both lowercase and uppercase letters. When this box is not checked, passwords may contain all lowercase, all uppercase, or both lowercase and uppercase letters. This option is not available unless the option to make passwords contain letters and numbers is selected.

### Must contain some characters that are not letters and numbers (such as !#\$&?)

Check this box if you want to require passwords to contain at least one character that is not a number (0 through 9) or a letter of the alphabet (a through z).

### Never expire

### Expire every x days

Choose "Never expire" if you not want to require Volgistics System Operators to change their Volgistics passwords periodically.

Choose "Expire every x days" if you want to require Volgistics System Operators to change their Volgistics passwords periodically. Use the drop-down list to choose how frequently passwords should expire.

If you choose to have your System Operator passwords expire periodically, System Operators will receive a notice that their password will expire soon on the Welcome page beginning one week before their password will expire. System Operators may change their password when see this notice. If a System Operator does not change their password before it expires, Volgistics will require them to update their password the next time they log in.

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## VicNet My Profile Tab Photo page

Help topic 1034

Added or revised 07-03-2012

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Use the *My Profile tab Photo* page to customize [volunteer photo \[pg:1798\]](#) features on the My Profile tab in [VicNet \[pg:1724\]](#). If you are not already on the *My Profile tab Photo* page you can get there by choosing Setup from the [menu \[pg:0215\]](#); selecting VicNet; selecting Profile tab (for volunteers); and then clicking the Photos link.

### Form section

If you want volunteers to be able to see or upload their own volunteer photo, use the Form section dropdown to choose the form section you want the photo and photo upload controls to appear in when volunteers view their "My Profile" tab at VicNet.

If you do not want volunteers to be able to view or upload their own volunteer photos, choose **Omit photos** from the Form section dropdown.

### **Need a new form section?**

If you do not currently have a form section suitable for the volunteer photo, you can open the Sections link and add a new form section for photos like this:

1. Choose Setup from the menu.
2. Select VicNet.
3. Select Profile tab (for volunteers).
4. Click the Sections link.
5. On the Vic My Profile tab Sections page, locate the next unused form section, and then enter a section heading – such as "Photo" and any instructions you want to appear under the form heading.
6. Click the Save button.

You can now return to the *My Profile tab Photo* page and choose the form section you just created for photos.

### Allow volunteers to upload their own photo

Check this option if you want volunteers to be able to upload a photo of themselves through VicNet.

When this option is not checked, only Volgistics system operators or Coordinators (if you allow Coordinators to upload photos) can upload volunteer photos.

### Allow volunteers to clear their own photo

This option is available only if you allow volunteers to upload their own photo.

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## VicNet Volunteer tab Photo page

Help topic 1035

Added or revised 07-03-2012

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Use the *Volunteers tab Photo* page to customize [volunteer photo \[pg:1798\]](#) features on the Volunteers tab that Coordinators see in [VicNet \[pg:1724\]](#). If you are not already on the *Volunteers tab Photo* page you can get there by choosing Setup from the [menu \[pg:0215\]](#); selecting VicNet; selecting Volunteers tab (for coordinators); and then clicking the Photos link.

### Form section

If you want coordinators to be able to see or upload photos of their volunteers, use the Form section dropdown to choose the form section you want the photo and photo upload controls to appear in when coordinators view the "Volunteers" tab at VicNet.

If you do not want coordinators to be able to view or upload photos of their volunteers, choose **Omit photos** from the Form section dropdown.

### **Need a new form section?**

If you do not currently have a form section suitable for the volunteer photo, you can open the Sections link and add a new form section for photos like this:

1. Choose Setup from the menu.
2. Select VicNet.
3. Select Volunteers tab (for coordinators).
4. Click the Sections link.
5. On the Vic Volunteers tab Sections page, locate the next unused form section, and then enter a section heading – such as "Photo" and any instructions you want to appear under the form heading.
6. Click the Save button.

You can now return to the *Volunteer tab Photo* page and choose the form section you just created for photos.

### Allow Coordinators to upload volunteer photos

Check this option if you want coordinators to be able to upload photos of their volunteers through VicNet.

When this option is not checked, only Volgistics system operators or volunteers (if you allow volunteers to upload their own photos) can upload volunteer photos.

### Allow Coordinators to clear volunteer photos

This option is available only if you allow coordinators to upload photos of their volunteers.

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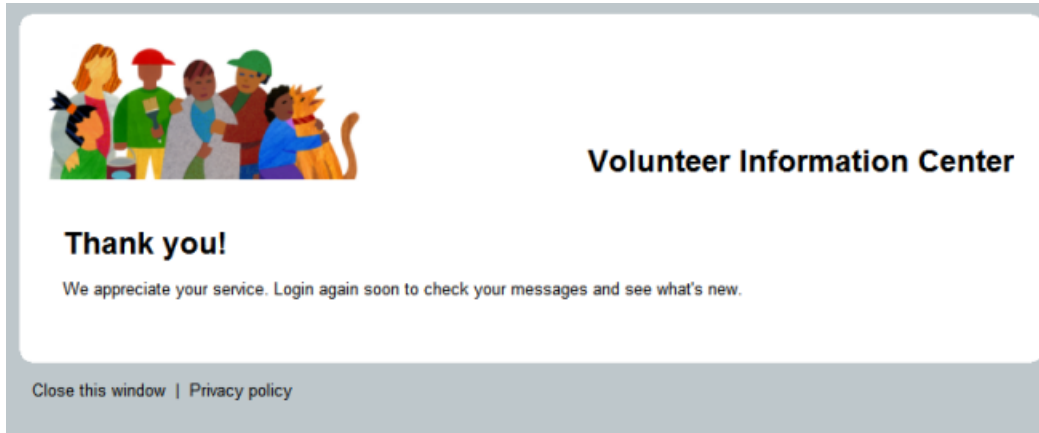
## VicNet Exit Page Setup

Help topic 1071

Added or revised 08-02-2012

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When a volunteer or coordinator clicks the **Exit** button in VicNet they go to an 'Exit' page similar to this:



You use the 'VicNet Exit Page' setup page to customize the way the [VicNet \[pg:1724\]](#) Exit Page appears. If you're not already on this setup page you can get there by selecting 'Setup' from the [menu \[pg:0215\]](#), clicking the 'VicNet' link, and then choosing 'Exit Page.'

The Exit page is typically used to thank the volunteer or coordinator for visiting, and acknowledge that they have logged-out of VicNet.

### Exit page heading

Enter the text heading you want to appear at the top of the Exit page. For example "Thank you" or "Good-bye!"

### Exit page text

Enter the text you want to appear on the Exit page. This would typically acknowledge that the visitor has now exited from VicNet, and that they may click the 'Continue' button to return to a web page of your choosing (usually your own web site).

When you're finished, click the **Save** button to Save your changes, or the **Cancel** button to exit without saving.

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## VicNet Ground Rules

Help topic 1073

Added or revised 04-28-2016

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You use the VicNet Ground Rules page to setup the basic operating rules for the online accessible Volunteer Information Center (VicNet for short). If you're not already on the VicNet Ground Rules page you can get there by selecting Setup from [menu \[pg:0215\]](#), selecting "VicNet," and then clicking the "Ground Rules" link.

### Volunteers Can...

Volunteers can use VicNet if...

Their Status is...

You can prevent volunteers with a certain Status – such as Inactive – from being able to use VicNet. Check the volunteer Status (or Statuses) volunteers must have in order to use VicNet. If a volunteer has a Status that is **not** checked here, they will be unable to login to VicNet even if an email address and password are established in their volunteer record.

If their Type is/is not

You can control which Type(s) of volunteers can access VicNet. If you want only volunteers of a particular Type – such as Adult – to be able to use VicNet, check the box next to Type and select the "is" button. Choose the volunteer Type the volunteer must have to use VicNet from the drop down list.

To exclude a Type from being able to use VicNet, check the box next to Type and select the "is not" button. Choose the volunteer Type that cannot use VicNet – such as Junior – from the drop down list.

If a volunteer Type is prohibited from using VicNet on the VicNet Ground Rules page, a volunteer with that Type will not be able to login to VicNet even if an email address and password are established in their volunteer record.

If their Flags include

To allow only volunteers with a particular Flag to access VicNet, check the box next to "If their Flags include" and select the Flag volunteers must have to use VicNet from the drop down list.

### Coordinators can...

Check "Use VicNet" if you want [coordinators \[pg:0163\]](#) to be able to use VicNet. When "Use VicNet" is checked, coordinators can login to VicNet and perform certain record management functions for the volunteers who have the assignment(s) they coordinate.

### Password strength rules

Use the password controls to customize VicNet password creation rules. Changes made to these settings only affect passwords created starting at the time you make the change (existing passwords are not affected until they are changed). These controls enable customers to set password standards consistent with their own privacy and security policies.

[VicNet passwords are case sensitive](#)



For security, VicNet passwords are case sensitive by default. The system will check for correct upper and lowercase letters when passwords are entered.

Must be at least \_\_\_ characters long

Use this control to set the minimum password length. Choose any value between 4 and 30 characters.

Must contain a combination of letters and numbers

Check this box if you want to require that passwords contain a combination of letters and numbers. When this box is not checked, passwords may contain only letters, only numbers, or both letters and numbers.

Must contain a combination of lower case and uppercase letters

Check this box if you want to require that passwords contain both lowercase and uppercase letters. When this box is not checked, passwords may contain all lowercase, all uppercase, or both lowercase and uppercase letters. This option is not available unless both the option to make passwords case sensitive and the option to make passwords contain letters and numbers are selected.

Must contain some characters that are not letters and numbers (such as !#\$&?)

Check this box if you want to require that passwords contain at least one character that is not a number (0 through 9) or a letter of the alphabet (a through z).

Never expire

Expire every \_\_\_ days

Choose "Never expire" if you do not want to require that volunteers and coordinators change their passwords periodically. Choose "Expire every \_\_\_ days," and select the number of days if you do want to require volunteers and coordinators to change their passwords periodically.

If passwords will never expire, choose "Allow volunteers & coordinators to change their passwords" if you want volunteers and coordinators to be able to change their own password when they choose to. It is a good idea to choose this option, as it provides volunteers with a way to set their own password without having to ask the volunteer office to set a particular password for them. Choose "Do not allow volunteers & coordinators to change their passwords" if you do not want to allow volunteers or coordinators to change their own passwords. You can optionally choose to let just volunteers, or just coordinators, change their own passwords.

If you require or allow volunteers to change their own passwords, they can do so on the Account tab in VicNet. If you do not allow volunteers to change their own passwords, the "change password" option does not appear on the Account tab in VicNet.

*For security, there is technically not a way to prevent volunteers from changing their passwords completely. Volunteers and coordinators can still change their password by using the [Forget your password? \[pg:1975\]](#) link.*

**Please note:**

Even if one of the options is selected to

*not*

allow volunteers or coordinators to change their own passwords, they will still be able to change their own password by clicking the [Forget your password? \[pg:1975\]](#) link on the login page. There is not a way to completely prevent volunteers and coordinators from changing their own password.

## Password email

Volgistics uses this template for the VicNet password email message. The same template is used for three purposes: 1) when the message is sent by a [System Operator \[pg:0065\]](#) to volunteers, 2) when the message is sent by a System Operator to [Coordinators \[pg:0163\]](#), and 3) when the message is sent because volunteers or Coordinators request a password on the VicNet login page.

We recommend customizing the contents of the password email message to fit your organization's needs. For example, it is often useful to include instructions to the web page on your organization's website where you've [placed the link to the VicNet portal \[pg:1491\]](#).

Because the same email message is used for all three purposes mentioned at the start of this section, you will want to keep the message generic enough to apply to all three purposes while still educating the person on how to log-in. You can see a sample what you could enter as the message's content below:

Expire every  days

### Password email

Volunteers and Coordinators can receive a link to set their password by email. You can customize the content of this message below. Volgistics inserts the person's login name (email address), and the password link, between the Top and Bottom parts

Top part:

```
Thank you for serving at "My organization." You can find login information for the Volunteer Information Center (VicNet) below. Click on the link to set your password. After you have successfully set a password, you will be directed to the login page.
```

Bottom part:

```
To login to VicNet in the future:  
  
1. Go to our website (www.organization.org)  
2. Select the Volunteer page.  
3. Click on the "Volunteer portal" link.  
4. Enter your email address and password.  
  
We appreciate your service! Please contact Jessica in Volunteer Services (555-444-3333) if you have trouble logging-in.
```

What should the subject line be for VicNet password emails?

### Heading

Please keep in mind that the text fields for customizing your password email message will only take plain text. So if you do not place a link to the VicNet portal on your web site, and choose to give the [URL address for the portal \[ \]](#) in your message, the URL address may not always appear as a clickable link when the volunteer or Coordinator receives the email. This will depend on how the recipient's email system treats URL addresses sent in plain text. To help with this, it may be beneficial to put text such as "If this does not appear as a clickable link, please copy and paste this address into your web browser" in your message.

There are two parts to this email message, a top part and a bottom part. Volgistics inserts the volunteer or coordinator's email address and a password link between these two parts.

### Top Part

Enter the part of the message you want to appear above the volunteer's login information.

### Bottom Part

Enter the part of the message you want to appear beneath the volunteer's login information.

### **Heading**

By default, VicNet will have a heading at the top with the words "Volunteer Information Center." You can optionally change this heading here. If you want to refer to the VicNet system using a name other than "Volunteer Information Center," enter it here. For example, you might prefer to refer to the VicNet system as your "Volunteer Portal;" "Volunteer File;" or "Volunteer Central" (or something specific to your organization).

### **Login Instructions**

Use the Login fields to customize the messages that appear on the VicNet Login page. The Login page is the page that first appears when volunteers click the VicNet link on your web site, where they enter their email address and password to login.

#### Enter any instructions you want to appear on the VicNet Login page

Use this space to add a custom message to the top of the login page that volunteers and coordinators use to login to VicNet. You may want to provide volunteers with information about what they should do if they have forgotten their email address or password (consider providing the name of the person in the volunteer office who can help them if they require login assistance). You might also include instructions here that explain that only registered volunteers can login, and what steps a visitor to your web site should take if they are not a registered volunteer, but they are interested in becoming one.

#### Enter the message you would like to appear if...

If you use Volgistics to provide an [online volunteer application form \[pg:0413\]](#), you can optionally [ask applicants to choose a VicNet password on the application form \[ \]](#). However, an applicant cannot access VicNet until you have [received their application form \[pg:0415\]](#) from the Applications tab in your Volgistics Mailbox (and they meet any other criteria you specify for VicNet access).

If an applicant attempts to login to VicNet before you receive their application form they will see a message explaining that they cannot access VicNet until after you receive their application (and they meet any other criteria for VicNet access you specify). Use this field to customize the message these applicants will see if they attempt to login before you receive their application. Your message should explain that the volunteer cannot login to VicNet yet because their application form is still pending.

You can skip this field if you do not use an online volunteer application form, or you do not ask applicants to select a VicNet password on your online application form (because applicants would not know how to login until after you receive their application and provide them with a VicNet password yourself).

### **Links**

## Your public account identifier is

Your Volgistics "public account identifier" is shown here. If you [create links to VicNet from your own web site \[pg:1491\]](#), your links must include this number as shown in the link examples. If you do not correctly include this number in your links, they will not work.

Your "public" account number is different than your regular nine-digit Volgistics account number. Your public account identifier cannot be used as part of your Volgistics login credentials, therefore it is safe to include it in your VicNet links, which may be visible to visitors to your web site.

When you're finished, click the **Save** button to save your changes, or the **Cancel** button to exit without saving.

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## VIC Graphics

Help topic 1074

Added or revised 09-18-2007

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Organizations may customize any of the graphic images that appear in [VicNet \[pg:1724\]](#) or VicTouch. You use the VIC Graphics page to select the graphic image you want to customize. If you're not already on the VIC Graphics page, you can get there by choosing Setup from the [menu \[pg:0215\]](#), clicking on VicNet, and then clicking the "Graphics" link.

To customize a graphic image, click on the image you want to customize.

To restore the default graphics for all of the images, click the **Restore Defaults** button.

Click the **Close** button when you're finished.

### Related help

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## Customizing VIC Graphics

Help topic 1075

Added or revised 08-23-2011

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Organizations may customize any of the graphic images that appear in [VicNet \[pg:1724\]](#) for a truly 'branded' and integrated look.

The general steps to creating custom graphics are:

1. Determine the maximum dimensions and file size for the image you want to customize.
2. Use graphics editing software to customize or create a new image (Volgistics does not provide or support graphics editing software, however graphics tools are readily available from many sources and they often come pre-installed on new computers).
3. Upload your custom graphics using the Vic Graphics page in Setup.

### Things to consider before you customize graphics

## File formats

Custom images must be in one of these graphic file formats: GIF, JPG, or PNG. Some graphic file formats are more suitable than others for a particular image. If you're not familiar with graphic image file formats and when one is more suitable than another (or with graphic editing tools) you may want to involve someone with these skills.

## Each image has maximum dimensions

To ensure a proper fit on the page, each graphic image has a maximum height and width in pixels. You should know what the maximum dimensions are for a particular image before you begin developing a custom version. Don't make your custom graphic larger than the maximum dimensions or it won't fit. You can determine what the maximum dimensions are for a particular image by clicking on the image from the [Vic Graphics \[pg:1451\]](#) window.

## Each image has a maximum image file size

To ensure fast load times for VIC pages, each graphic image has a maximum image file size in bytes. You should know what the maximum image file size is for a particular image before you begin developing a custom version. You can determine what the maximum image file size is for a particular image by clicking on the image from the [Vic Graphics \[pg:1451\]](#) window.

If your image file size is too large, you can often make it smaller by reducing the number of colors used in the file, without degrading the appearance of the image.

## Consider your background color

You can set a background color for your forms, including Vic, on the [Online Forms Ground Rules page \[pg:1330\]](#). Your custom images should either have a transparent background, or use the same background color as your forms.

## Graphic image rights

You can copy and modify the default graphic images that are part of Volgistics, as long as you use these images in Volgistics only. Volgistics does not grant rights to use its images for any other purpose, or for use outside of Volgistics.

If you're using graphic images you've obtained from other sources, you must be certain that you have the legal right to use those images. Unless an image is offered for use without restriction, most of the graphic images that appear on the web are protected by copyrights. Be certain you have the proper rights before installing custom graphics you have obtained from others.

## **Installing a custom graphic**

Before you can install a new graphic, the graphic file you want to install must be accessible from your computer: either on your computer's hard drive, a network drive you can reach from your computer, or on a CD or diskette you can access.

When you're ready to install a custom graphic follow these steps (you must be logged into your Volgistics account with access to the Setup area):

1. Choose Setup from the [menu \[pg:0215\]](#).
2. Click the "VicNet" link.
3. Click the "Graphics" link.
4. Click on the graphic you want to customize. This opens the VIC Graphics editing page.
5. Select "Install a new graphic"
6. Click the Browse button.
7. Use the "Choose file" window to locate the custom graphic file you want to load, then click the Open or Ok button.
8. Click the Install button. It may take a minute or two for your computer to upload the new file, so do not close your browser or go to another web page until you receive the upload confirmation.

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## VIC My Schedule Setup Page

Help topic 1171

Added or revised 04-06-2017

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The VIC My Schedule tab is where volunteers and coordinators can view their schedule, and optionally sign-up for openings. This help topic explains what features are available on the VIC My Schedule tab and how to customize them. You customize the VIC My Schedule tab on the VIC My Schedule Tab setup page. If you're not already on this page (and you have access to Setup) you can get to the VIC Schedule Tab setup page by choosing [Setup \[pg:0887\]](#) from the [menu \[pg:0215\]](#), selecting VicNet, and then choosing the 'Schedule tab' link.

### **Volunteers can...**

#### *Use this tab at VicNet*

To permit volunteers to access the My Schedule tab at VicNet, mark this box. If this box is unchecked, volunteers will not see this tab at all when they log into VicNet.

#### *Use this tab at VicTouch*

To permit volunteers to access the My Schedule screen at VicTouch, mark this box. If this box is unchecked, volunteers will not be able to view the My Schedule screen at VicTouch.

#### When volunteers view the schedule, do you want them to see who else is scheduled?

#### *No*

Choose No if you do not want volunteers to see anything other than the dates and times they are scheduled themselves. When you choose this option volunteers cannot see when other volunteers are scheduled at VicNet.

#### *Yes, but only in Assignments they can sign-up for*

Choose this option if you want volunteers to see when other volunteers are scheduled each day, but only in Assignments that a volunteer is allowed to schedule themselves for (in other words, only in their own Assignments). This is the recommended setting.

## *Yes, in all Assignments*

Choose "Yes, in all Assignments" if you want volunteers to see who else is scheduled in all of the Assignments you have in your database.

## **Coordinators can...**

### Use this tab at vicNet

To permit coordinators to access the My Schedule tab at VicNet, mark this box. If this box is unchecked, coordinators will not see this tab at all when they log into VicNet.

### View schedules only

Choose this option to allow coordinators to view the schedules for their Assignments on the My Schedule tab in VicNet, but to prevent them from changing the schedules. A coordinator will only be able to view schedules for the Assignments listed on the Assignment tab in their coordinator record.

### View and change schedules

Select this option to permit coordinators to both view and change their schedules displayed on the My Schedule tab. A coordinator will only be able to view and change schedules for the Assignments listed on the Assignment tab in their coordinator record.

## **Assignment names**

### Show Assignment names *without* Site and Place names

Choose this option if only Assignment names should be displayed on the My Schedule tab.

### Show Assignment names *with* Site and Place names

Choose this option to display Assignment names along with Site and Place names on the My Schedule tab.

## **Appearance for VicNet**

### Mobile text for tab:

This field shows the name that will be used for the expanding menu when volunteers use the mobile friendly version of VicNet. You can learn more about these settings in the *Expanding Menu Items* section of [help topic 1214 \[\\_\\_\\_\\_\\_\]](#).

The text in the *Mobile text for tab* field is also what is used in the *full-site* view if the user has a screen reader or has their web browser set up to show alternate (alt) text when their cursor hovers over the tab image.

Click the *Restore default* link to return the tab's alternate text to its default of "My Schedule."

Note that the text entered in this field will not change the name of the tab in the

*full-site*

view because the name is actually part of the tab image file. Entering a label here will only change the text

displayed in the box that appears on the screen when you hover the cursor over the tab name, and the name displayed for the tab in the expanding menu for the mobile view of VicNet. To change the actual appearance of the tab in the full-site view, you will need to upload a new graphic file for the "My Schedule" tab. You can use the [VIC Graphics \[pg:1451\]](#) setup page to upload a new tab image.

#### Do not include links to Assignment profiles for each Assignment

Choose this option to have volunteers view the Assignment names on their schedule at the VicNet Schedule tab without a link to the Assignment profile.

#### Include links to Assignment profiles for each Assignment

Select this option to have volunteers view links to the Assignment profile for each Assignment on their schedule at the VicNet Schedule tab.

The assignment information that appears when this link is clicked is controlled by the fields selected for the assignment in the [Opportunity Directory \[pg:1368\]](#). If no fields appear when the link is clicked, please select one or more fields under 'Assignment information' on the Opportunity Directory Setup page.

### **Coordinator calendar view options**

#### Display volunteer names as

*First initial. Last name*

Choosing this option would cause the name of a volunteer named Tom Smith to be displayed as "T. Smith" for example.

*First name Last name*

Choosing this option would cause the name of a volunteer named Tom Smith to be displayed as "Tom Smith" for example.

*Last name, First name*

Choosing this option would cause the name of a volunteer named Tom Smith to be displayed as "Smith, Tom" for example.

#### Include volunteer's...

Use this section to determine which phone number(s) should be visible when coordinators view their calendar at VicNet. Also use this section to indicate whether or not volunteer email addresses should appear.

*Only list phone numbers that are OK to call*

If this option is marked, only phone numbers for which the "OK to call" checkbox is checked will appear on the coordinator's calendar view.

### **Instructions**

Display these instructions on the My Schedule tab for volunteers:



Enter the text you would like volunteers to see when they access the My Schedule tab at VicNet.

Locate these instructions at the...

*Top of the tab*

Select this option to place these instructions at the top of the My Schedule tab for volunteers.

*Bottom of the tab*

Select this option to place these instructions at the bottom of the My Schedule tab for volunteers.

Display these instructions on the My Schedule tab for coordinators:

Enter the text you would like coordinators to see when they access the My Schedule tab at VicNet.

Locate these instructions at the...

*Top of the tab*

Select this option to place these instructions at the top of the My Schedule tab for coordinators.

*Bottom of the tab*

Select this option to place these instructions at the bottom of the My Schedule tab for coordinators.

## **Appearance for VicTouch**

Page Heading

Enter the text that should appear at the top of the Schedule screen at VicTouch. By default, this heading reads as "Volunteer Schedule for (volunteer name)."

Display these instructions at the top of the Schedule page:

Enter the text you would like volunteers to see when they access the Schedule screen at VicTouch.

Click the **Save** button to save your changes, or click **Cancel** to navigate away from the My Schedule tab setup page without saving any changes.

---

## **VicNet My Profile Tab**

Help topic 1178

Added or revised 08-05-2015

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The My Profile tab at [VicNet \[pg:1724\]](#) is where volunteers and coordinators can view and update their volunteer profile. This help topic explains what features are available on the VicNet My Profile tab and how to customize them. You customize the VicNet My Profile tab on the VIC My Profile Tab setup page. If you're not already on this page (and you have access to [Setup \[pg:0887\]](#)) you can get to the VIC My Profile Tab setup page by choosing Setup from the [menu \[pg:0215\]](#), selecting VicNet, and then choosing the 'Profile tab (for volunteers)' link.

## Volunteers can...

### *Use this tab at vicNet*

To permit volunteers to access the My Profile tab at VicNet, mark this box. If this box is unchecked, volunteers will not see this tab at all when they log into VicNet.

### Mobile text for tab:

This field shows the name that will be used for the expanding menu when volunteers use the mobile friendly version of VicNet. You can learn more about these settings in the *Expanding Menu Items* section of [help topic 1214 \[ \]](#).

The text in the *Mobile text for tab* field is also what is used in the *full-site* view if the user has a screen reader or has their web browser set up to show alternate (alt) text when their cursor hovers over the tab image.

Click the *Restore default* link to return the tab's alternate text to its default of "My Profile."

Note that the text entered in this field will not change the name of the tab in the

### *full-site*

view because the name is actually part of the tab image file. Entering a label here will only change the text displayed in the box that appears on the screen when you hover the cursor over the tab name, and the name displayed for the tab in the expanding menu for the mobile view of VicNet. To change the actual appearance of the tab in the full-site view, you will need to upload a new graphic file for the "My Profile" tab. You can use the [VIC Graphics \[pg:1451\]](#) setup page to upload a new tab image.

## Sections

Click the "Sections" link to define the sections you want to appear on the "My Profile" tab in VicNet.

## Fields

Click the "Fields" link to access the VIC My Profile Tab Fields setup page. Here you can choose which sections fields should appear under on the My Profile tab at VicNet. You can also use this page to omit fields, determine which fields are required, and set certain fields as 'read only.'

## Photos

Click the "Photos" link if you want to add or change [volunteer photo \[pg:1798\]](#) features on the My Profile tab.

## Emergency contact Fields

Click the "Emergency contact Fields" link to access the VIC My Profile Tab Emergency contact Fields setup page. If you want the "My Profile" tab to provide fields for Emergency contacts, you can use this setup page to choose the section of the tab where these fields should appear, the number of Emergency contacts volunteers can enter, and which Emergency contact fields should be included, required, or made 'read only.'

## Employer Fields

Click the "Employer Fields" link to access the VIC My Profile Tab Employer Fields setup page. If you want the "My Profile" tab to provide fields for Employer contacts, you can use this setup page to choose the section of the tab where these fields should appear, the number of Employer contacts volunteers can enter, and which Employer contact fields should be included, required, or made 'read only.'

### Reference Fields

Click the "Reference Fields" link to access the VIC My Profile Tab Reference Fields setup page. If you want the "My Profile" tab to provide fields for Reference contacts, you can use this setup page to choose the section of the tab where these fields should appear, the number of Reference contacts volunteers can enter, and which Reference contact fields should be included, required, or made 'read only.'

### Relative Fields

Click the "Relative Fields" link to access the VIC My Profile Tab Relative Fields setup page. If you want the "My Profile" tab to provide fields for Relative contacts, you can use this setup page to choose the section of the tab where these fields should appear, the number of Relative contacts volunteers can enter, and which Relative contact fields should be included, required, or made 'read only.'

### Spouse Fields

Click the "Spouse Fields" link to access the VIC My Profile Tab Relative Fields setup page. If you want the "My Profile" tab to provide fields for Spouse contacts, you can use this setup page to choose the section of the tab where these fields should appear, the number of Spouse contacts volunteers can enter, and which Spouse contact fields should be included, required, or made 'read only.'

### Display these instructions on the My Profile tab for volunteers:

Enter the text you would like volunteers to see when they access the My Profile tab at VicNet.

### Locate these instructions at the...

#### *Top of the tab*

Select this option to place these instructions at the top of the My Profile tab for volunteers.

#### *Bottom of the tab*

---

## **Changing Volunteers' VIC Privacy Settings**

Help topic 1179

Added or revised 04-12-2017

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The [VIC Schedule tab \[pg:1453\]](#) features provide the option of showing volunteers other volunteers who are scheduled to work. When this is enabled, the names of other volunteers who are scheduled are displayed in VicNet when a volunteer selects a specific date from the calendar.

**Schedule**

**Greeters** [Description](#)  
 6:00 a to 11:30 a Open  
 1 volunteer still needed  
 Would you like to serve on this date? Click the **Schedule me** button to schedule yourself here  
 6:00 a to 11:30 a Carter, Kathryn

**Mail Delivery** [Description](#)  
 10:00 a to 2:30 p Barker, Geraldine  
 10:00 a to 2:30 p Saenz, Charles

**Patient Advocate** [Description](#)  
 9:00 a to 5:00 p Sullivan, Sharon

[Calendar view](#)

You may have volunteers who do not want their names to be displayed for privacy reasons. In this case, Volgistics has a feature to make opening slots appear as filled, but to hide the volunteer's name.

**Schedule**

**Greeters** [Description](#)  
 6:00 a to 11:30 a Open  
 1 volunteer still needed  
 Would you like to serve on this date? Click the **Schedule me** button to schedule yourself here  
 6:00 a to 11:30 a Carter, Kathryn

**Mail Delivery** [Description](#)  
 10:00 a to 2:30 p Barker, Geraldine  
 10:00 a to 2:30 p Saenz, Charles

**Patient Advocate** [Description](#)  
 9:00 a to 5:00 p Filled

[Calendar view](#)

This help topic explains different ways to set a volunteer's record so the volunteer's name does not appear on the schedule for other volunteers to see.

### Allow Volunteers to Change Their Privacy Settings in VicNet

You may want to give volunteers the choice to un-check, or check, the *Share my schedule* option that controls if their name is listed in VicNet. Here is how you can do this:

1. Choose [Setup \[pg:0887\]](#) from the menu.
2. Click on VicNet.
3. Click on *Profile tab (for volunteers)*.
4. If you want to have the field in its own form section, select

#### Sections

. You can put information in the instructions field to let volunteers know more about what un-checking the option will do. Remember to click the **Save** button after you finish. You can find additional help on creating sections in [help topic 1055 \[pg:1340\]](#).

If you do not need a new form section, proceed to step 5.

5. Click on the *Fields* link.

6. Scroll down to the *Vic Tab Fields* section, and locate the *Share my schedule* field.
7. Choose the name of the section where the field should be located from the dropdown menu.

The screenshot shows a configuration window with a yellow background. At the top, there is a 'Languages:' dropdown menu set to 'Skills & Experience'. Below it is an 'Assignment Preference:' dropdown menu set to 'Omit'. The 'Vic Tab Fields' section contains a 'Section' dropdown menu set to 'Privacy'. To the right of this dropdown is a 'Read only' checkbox, which is checked. A red arrow points to this checkbox. At the bottom right, there are three buttons: 'Help', 'Save', and 'Cancel'.

8. Click the **Save** button.

This will add the field to the

*My Profile*

tab in VicNet so volunteers can update the field themselves. You can check how the tab appears for volunteers by previewing a volunteer record as shown in [help topic 2159 \[pg:1705\]](#).

**Please note:** You can make the *Share my schedule* field visible to volunteers, but not allow them to change the field's settings. To do this, check the *Read only* box to the right of the field after step 7.

### **Change a Volunteer's Privacy Settings Yourself**

As a [System Operator \[pg:0065\]](#), you can also update a volunteer's privacy settings yourself. To do this:

1. Choose *Volunteers* from the [menu \[pg:0215\]](#).
2. Locate and click on the name of a volunteer. If you need help with this, see [help topic 2023 \[pg:1982\]](#).
3. Go to the *Vic* tab in that volunteer's record.
4. Locate the Privacy box at the bottom of the *Vic* tab, and either mark or un-mark the *Allow other volunteers to see when I am scheduled* checkbox.
5. Click the **Save** button.

---

## **VicNet Time Sheet Tab**

Help topic 1204

Added or revised 10-04-2016

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You use the VicNet Time Sheet Tab page to setup your [VicNet \[pg:1724\]](#) module to allow volunteers to enter their own service information. Service entered on the Time Sheet tab will become service entries on the [Service tab \[pg:1581\]](#) of the individual volunteer record. You can choose to audit entries made through VicNet also. [Help topic 1072 \[pg:1408\]](#) shows how to set this up.

If you're not already on the VicNet Time Sheet Tab page, you can get there by selecting Setup from [menu \[pg:0215\]](#), selecting "VicNet," and then clicking the "Time Sheet tab" link.

### **Volunteers can...**

Use this section to control whether or not volunteers can use the Time Sheet tab through VicNet and what they will see.

#### **Use this tab at VicNet**

Check the box if you want to allow volunteers to post service using the VicNet module. If the box is not checked, volunteers will not see the Time Sheet tab when they log into VicNet so none of the other settings on this page will apply.

#### **If their Type is or is not**

You can control which [Type\(s\) \[pg:0212\]](#) of volunteers can use the VicNet Time Sheet tab if you wish. If you only want volunteers of a particular Type – such as Adult – to be able to post their service hours on the Time Sheet tab, check the box next to Type and select the "is" button. Choose the volunteer Type the volunteer must have to use the Time Sheet tab from the dropdown list.

To exclude a Type from being able to use the Time Sheet tab, check the box next to Type and select the "is not" button. Choose the volunteer Type that you do not want to allow to post service – such as Junior – from the dropdown list.

#### **If their Flags include**

To allow only volunteers with a particular [Flag \[pg:0212\]](#) to post service hours on the Time Sheet tab, check the box next to "If their Flags include" and select the Flag volunteers must have to use the Time Sheet tab from the dropdown list. For example, if you have volunteers who do not serve at the main campus and have marked these records with an "Off Site" Flag, you can allow only these volunteer to use the Time Sheet tab to enter service by checking the box and then selecting the "Off Site" Flag from the dropdown list.

#### **Mobile text for tab:**

This field shows the name that will be used for the expanding menu when volunteers use the mobile friendly version of VicNet. You can learn more about these settings in the *Expanding Menu Items* section of [help topic 1214 \[\\_\\_\\_\\_\\_\]](#).

The text in the *Mobile text for tab* field is also what is used in the *full-site* view if the user has a screen reader or has their web browser set up to show alternate (alt) text when their cursor hovers over the tab image.

Click the *Restore default* link to return the tab's alternate text to its default of "Time Sheet."

Note that the text entered in this field will not change the name of the tab in the

*full-site*

view because the name is actually part of the tab image file. Entering a label here will only change the text displayed in the box that appears on the screen when you hover the cursor over the tab name, and the name displayed for the tab in the expanding menu for the mobile view of VicNet. To change the actual appearance of the tab in the full-site view, you will need to upload a new graphic file for the "Time Sheet" tab. You can use the [VIC Graphics \[pg:1451\]](#) setup page to upload a new tab image.

### **Volunteers will post their volunteer service...**

Select the option that meets your organization's needs for collecting volunteer service information. There are three basic options--daily entries, monthly entries, or a single date or range of dates. When they apply, you will see more settings under the basic option you select.

### **On a daily basis (one entry for each day they serve)**

Select this if you want a service entry created for each date where a volunteer has service. There are additional settings under this to control the dates volunteers can choose and how much detail you want the service entry to have.

For the current day only. Select this option if you only want volunteers to be able to enter service for the current date.

For any date up to XX day(s) back. Select this option if you want volunteers to be able to enter service for the current date, or any date a selected number of days ago. For example, selecting 7 from the dropdown allows volunteers to enter service for the current date, or any date in the previous week. You can select 1 through 10 days back, and then increments of 10 up to 60 (i.e. 10, 20, 30, etc.).

For any date. Select this option if you want volunteers to be able to enter service for any date in the current year, or any year up to 5 years past.

Support all time zones. Select this option if you have selected either the "For the current day only" or the "For any date up to XX day(s) back" option above, and you have volunteers in time zones where the date will be different than your own. This basically adds the next calendar date to the options volunteers see so they do not need to wait for the date to take place in your time zone before entering service.

Here is an example of how this could work. In this scenario we will take the case of your account headquarters being located on the east coast of the continental United States, but you have volunteers located in Asia who enter service hours using VicNet. If it is November 28, 2014 in your time zone it may already be November 29, 2014 for the volunteers in Asia. Selecting this setting allows volunteers to enter service for the November 29, 2014 date before midnight takes place on November 28, 2014 in your time zone.

Do you want volunteers to have 'start' and 'stop' time fields for entering . . . . Select "No. Do not provide start and stop time fields" if you want volunteers to enter service without recording the time they began and ended the service. With this option, volunteers will use an hour and minute dropdown to select the time served. These dropdowns will only allow a maximum of 23 hours and 59 minutes of service because that is the most service that can be given during a 24 hour day.

Select "Yes, Provide start and stop time fields" if you want volunteers to enter a beginning and ending time for the service they record. Volgistics will automatically calculate the hours and minutes for the service entry based on the volunteer's selections.

Volunteers should enter their start and stop times. . . . If you selected to have volunteers enter start and stop times, use this setting to control how the dropdown lists for hours and minutes will appear. You can select to have the dropdown lists show 15 or 30 minute intervals, one hour intervals, or to allow any valid hour and minute time entry.

### **On a monthly basis (one lump-sum entry for each month they serve)**

Select this option if you want one service entry created for a month of service. The service entry on the volunteer's Service tab will show with the first of the month for whatever month is selected. Volunteers can make multiple entries during the month. For example, if you have volunteers select the assignment they served in, they could make a lump-sum entry for the month for 30 hours in "Assignment A" and then make a separate entry for 20 hours in "Assignment B." Both entries will show on the 1st of whatever month they were made for. There are additional settings to control the months that appear for volunteers to select.

For the month most recently ended. Select this option if you want volunteers to enter service for whatever month ended last. For example, if it is currently November 2012, any service volunteers enter would apply to October 2012.

For any month, up to XX month(s) back. Select this option if you want volunteers to be able to enter service for the current month, or in any month a selected number of months back. For example, if it is currently November 2012 and you select 3 months back, volunteers could enter service for November 2012, October 2012, September 2012, or August 2012. You can select from 1 to 12 months back.

### **For any single day, or range of days they choose**

Select this option to allow volunteers to select a beginning and ending date for the service hours they are entering. This option will allow volunteers to select service dates for any date in the current year, or any year up to 5 years past. Volunteers can select a maximum of 180 hours and 59 minutes of service. Entries larger than this will need to be split into smaller entries.

### **Service measures**

In addition to collecting service hour information, you can also select to have volunteers enter information about any service measure you have setup in your account. Just check the box in front of the service measure(s) you want volunteers to see when they enter service. If you're unfamiliar with the service measure feature, [help topic 1016 \[pg:1557\]](#) explains more.

You can choose if the service measure's name is preceded by

*How much*

,

*How many*

, or if just the name of the service measure appears. You do this on the setup page for the service measure as shown in [help topic 1017 \[pg:1406\]](#).

### **Assignment tracking**

Use this section to control whether you will, or will not, have assignment information included with service entries made on the Time Sheet tab.

### **Do not ask them to select the assignment they volunteered in**

Select this if you want volunteers to enter service information without linking it to a specific assignment.

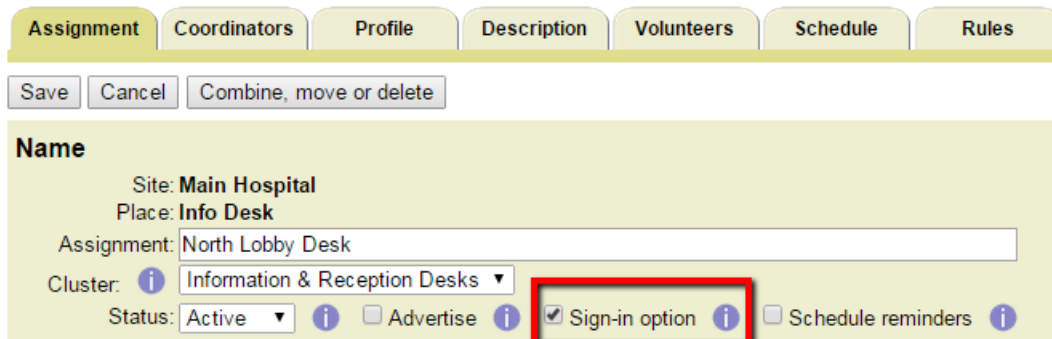
### **Ask them to select the Assignment they volunteer in**

Select this if you want the volunteer's service entry to be linked to a specific assignment. You can use the options that appear underneath of this to control which assignments appear on the list the volunteer can select from. You can select one, or more, of these options depending on which assignments you want shown.

Their own Assignments if their Role is. You can use [Roles \[pg:0103\]](#) to show a volunteer's relationship with an assignment. If you only want assignments where the volunteer has certain Roles to appear on the dropdown list, select this option and then the Roles you want from the list below the option. The Roles that appear underneath will depend on what Roles are currently setup in your account.



All Assignments flagged as 'Sign-in' options. Select this option if you want assignments with the Sign-in option checked to appear on the list. You can select this in addition to the settings in the "Their own Assignments if their Role is" section. This would make volunteers see their own assignments, plus any other assignments that have the Sign-in option checked. The Sign-in option appears on the first tab of the assignment record as shown in the picture below:



The screenshot shows a web interface for managing assignments. At the top, there are tabs for 'Assignment', 'Coordinators', 'Profile', 'Description', 'Volunteers', 'Schedule', and 'Rules'. Below the tabs are buttons for 'Save', 'Cancel', and 'Combine, move or delete'. The main form area is titled 'Name' and contains the following fields: 'Site: Main Hospital', 'Place: Info Desk', 'Assignment: North Lobby Desk', 'Cluster: Information & Reception Desks', 'Status: Active', 'Advertise' (unchecked), 'Sign-in option' (checked), and 'Schedule reminders' (unchecked). The 'Sign-in option' checkbox is highlighted with a red box.

### All Assignments

. Select this option if you want all assignments setup in your account to show on the dropdown list. Volunteers will see assignments as long as the assignment is still active in your account. If the assignment has been made inactive, it will not appear in the dropdown list. [Help topic 2537 \[pg:0140\]](#) explains more about inactive assignments.

Require volunteers to choose an assignment. Select this if you want to require volunteers to select an assignment when they submit a service entry. When this is selected, volunteers will be unable to complete a service entry if they do not select an assignment from the dropdown list.

Please note that if a volunteer does not have any assignments that apply based on the other options in the

### *Assignment Tracking*

section, that they can still submit a service entry even when this box is checked. For example, if you have the option for "Their own Assignments if their Role is" selected and the "Assigned" Role marked, a volunteer may not have any assignments with this Role on their [Service tab \[pg:0138\]](#). In this case a volunteer can still submit a service entry on the Time Sheet tab even if you have the "Require volunteers to choose an assignment" option selected.

### **Other settings**

This section has settings to allow you to customize more options on the Time Sheet tab.

### **Display the volunteer's five most recent service entries on the Time Sheet tab**

Select this option if you want the five most recent service entries for the volunteer to appear on the Time Sheet tab. These will include all service entries no matter [how the service was entered \[pg:1568\]](#) on the volunteer's record. Volunteers can always click the *My Service History* tab of their record to see a complete listing of their service entries as long as this tab is enabled in your VicNet setup.

### **Display this message after a volunteer submits a time sheet**

You can customize the message volunteers will see on the page after they confirm a service entry.

## **Instructions**

This section has settings to allow you to customize the instruction fields on the Time Sheet tab.

### **Display these instructions on the Time Sheet tab for volunteers**

You can customize the instructions volunteers see on the Time Sheet tab here.

### **Locate these instructions at the . . .**

Use these settings to control where the instruction field appears on the Time Sheet tab.

Top of the tab. Select this option to have the instructions appear at the top of the Time Sheet tab.

Bottom of the tab. Select this option to have the instructions appear at the bottom of the Time Sheet tab.

## **Time Sheet Tab and Mandatory Service**

There are not any settings to control how volunteers select to apply a service entry toward **mandatory service** [pg:1419] that you have setup for the volunteer. However, service entries can be applied to these from the Time Sheet tab.

If the volunteer only has one unfulfilled service mandate, then any service entry made on the Time Sheet tab will automatically go toward completing the requirement. Volunteers will not see the name of the mandatory service program when they make the entry, but they can view their progress toward completing the measure on their *My Service History* tab as long as your account is setup to show this. **Help topic 2156** [pg:1419] has instructions on how to make a chart for tracking mandatory service appear on the *My Service History* tab under the "To enable the mandatory service progress chart" heading.

If a volunteer has more than one unfulfilled service mandate, they will see a dropdown listing all unfulfilled service mandates that apply to them. They can use this dropdown to select the service mandate the service entry should apply to when they submit the service entry.

## **Time Sheet Tab and Group Records**

The Time Sheet tab will function much the same for **group records** [pg:1909] as it does for individual records. The difference will be that groups can enter the number of volunteers who served when making a service entry, and the group's hours may, or may not, be automatically calculated depending on if you include the starting and stopping times in the service entries. Please see the information under the "Group time sheets" heading in **Help topic 1198** [pg:1673] for more about how the Time Sheet tab functions for groups.

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## **VIC My Service Setup Page**

Help topic 1207

Added or revised 08-05-2015

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Service records in Volgistics are the record of the dates volunteers have contributed service to your organization. Service records must be entered into the system with one of the four methods shown in **help topic 1166** [pg:1568]. In addition to the date (or date range), a service entry can optionally record the **Assignment** [pg:0096] the volunteer served in, the times the volunteer served, the number of hours the volunteer served, as well as **Merit Hours** [pg:1564], **Service Measures** [pg:1557], and **Mandatory Service programs** [pg:1419].

The VIC My Service Setup page controls the settings and information on the *Service History tab* in [VicNet \[pg:1724\]](#) and the *Service History screen* in [VicTouch \[pg:1778\]](#). You can get to this page for VicNet by selecting Setup from the menu, expanding the VicNet link, and selecting *Service History tab*. You can get to this page for VicTouch by selecting Setup from the menu, expanding the VicTouch link, and selecting *Service History screen*.

This help topic details the settings on this page.

## **Main Service Display**

*Volunteers can. . .*

Use these controls to determine which modules volunteers can use to access service information.

### View their service history at VicNet

. Check this box if you want the *My Service History* tab to be available to volunteers when they login to the [VicNet \[pg:1724\]](#) module.

### View their service history at VicTouch

. Check this box if you want the *View my service* button to be available to volunteers when they sign-in to the [VicTouch \[pg:1778\]](#) module. When volunteers press this button, they will be taken to the *Service History screen* in VicTouch.

*Show. . .*

Use these controls to select which service information fields appear for the volunteers.

### Life total

. Check this box if you want the information volunteers see to include the total number of service hours recorded for them with your organization. This total is found on the [Service tab \[pg:1581\]](#) of the volunteer's record.

### Year-to-date total

. Check this box if you want the information volunteers see to include their year-to-date (YTD) total. This total shows how many hours volunteers have served from the start of your [fiscal year \[pg:0062\]](#) to the date the volunteer is viewing the information.

### Start date

. Check this box if you want the information volunteers see to include the date they started volunteering with your organization. This field is taken from the [Start Date \[pg:1890\]](#) field that is recorded on the History tab of the volunteer's record.

*Include these fields when displaying service information. . .*

When volunteers view their service history in VicNet, the view will initially be collapsed by year and totals for each column will appear.

## Volunteer information for Andrea Campbell

[Home](#) [Mail](#) [My Profile](#) [My Schedule](#) [My Service History](#) [Time Sheet](#) [Account](#)

### Instructions

Click the "Printable view" button for a printable view of this information.

#### Totals


Start date: December 26, 2007

Year-to-date hours: 757:29

Life hours: 1,822:25

### Service by year

Click on a year to view your records for the year.

Year	Hours	Merit hours
2013 	757:29	757:29
2012	1,016:00	1,016:00
2010	3:40	3:40
2009	22:56	22:56
2008	22:20	22:20
<b>Life total:</b>	<b>1,822:25</b>	<b>1,822:25</b>

Clicking on a year will expand the view to show individual dates service was recorded for that particular year.

## Volunteer information for Andrea Campbell

[Home](#) [Mail](#) [My Profile](#) [My Schedule](#) [My Service History](#) [Time Sheet](#) [Account](#)

### Instructions

Click the "Printable view" button for a printable view of this information.

### My 2013 Service Records

Click on any date to view the service record for that date.

Date	Hours	Merit hours
09-30-2013 	4:00	4:00
09-27-2013	4:00	4:00
09-26-2013	4:00	4:00
09-25-2013	4:00	4:00
09-24-2013	4:00	4:00
09-23-2013	4:00	4:00
09-20-2013	4:00	4:00

If the volunteer clicks on a specific date, they will see all details for the service entry that you select to be shown.

## Volunteer information for **Andrea Campbell**

[Home](#)[Mail](#)[My Profile](#)[My Schedule](#)[My Service History](#)[Time Sheet](#)[Account](#)

### Instructions

Click the "Printable view" button for a printable view of this information.

### My record for service starting **Monday, September 30, 2013**

Date:	09-30-2013
Start time:	7:00 am
Stop time:	11:00 am
Assignment:	Welcome Center Desk
Hours:	4:00
Merit hours:	4:00

When volunteers view their service history in VicTouch, the view will also be collapsed by year initially. If they press the **View details for year** button, they will see more specific details depending on what is selected in this section.

#### Date (always included)

. This is the date the service entry was recorded for. This field is always displayed by default when the view has been expanded by year. In VicNet if your account is setup to record a [beginning and ending date \[pg:1429\]](#) for service entries, the beginning date will appear on the expanded by year view and the beginning and ending date will appear on the view with full details. In VicTouch, just the beginning date will be displayed once the collapsed view has been expanded by year.

#### Assignment name (without Site and Place names)

. Select this option if you want the service entry to show the Assignment name without the Site and Place it falls under. The Assignment name will only appear on the view with full details. [Help topic 2099 \[pg:0096\]](#) explains more about the Site, Place and Assignment hierarchy.

#### Assignment name (with Site and Place names)

. Select this option if you want the service entry to show the Assignment name along with the Site and Place it falls under. The Assignment, Site, and Place names will only appear on the view with full details. [Help topic 2099 \[pg:0096\]](#) explains more about the Site, Place and Assignment hierarchy.

Time-in and time-out. Select this option if you want the service entry to show the time-in and time-out recorded. The Start and Stop time fields will only appear on the view with full details.

Hours. Select this option if you want the service entry to show the number of hours recorded. The Hours field will appear as a separate column on the initial view and the expanded by year view, as well as in the view with full details.

## Merit Hours

. Select this option if you want the service entry to show the number of Merit Hours recorded. If you do not have your account setup to use [Merit Hours \[pg:1564\]](#), this option will not appear as a choice. The Merit Hours field will appear in a separate column on the initial view and the expanded by year view.

## Service Measures

. If you have Service Measures setup in your account, each Service Measure you have will be listed by name. Select which Service Measures you want volunteers to see for the service entries. If you do not have any [Service Measures \[pg:1557\]](#) setup in your account, you will not see any choices here. Each Service Measure will appear in a separate column on the initial view and the expanded by year view.

### **Mandatory Service Progress**

If you have your account setup to require [Mandatory Service programs \[pg:1419\]](#), you will see this section to include a graph of the volunteer's progress toward their goal on the *My Service* tab of [VicNet \[pg:1724\]](#). An example of this appears below:

## **Community Service Service Goal**

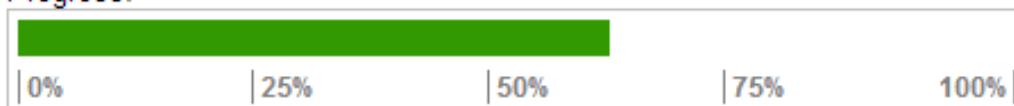
	Hours	Visits
Service goal:	250:00	50
Recorded so far:	145:06	35
Service remaining:	104:54	15

Started: 08-01-2013

Target date: 12-01-2013

Days left: 39

Progress:



**Please note:** If your Mandatory Service program is setup to be based on [Service Measures \[pg:1557\]](#) as well as hours, these service measures will appear on the progress chart. This is independent from the selections for Service Measures you may have selected in the

### *Main Service Display*

section of this help topic. The Service Measures that appear on the chart are based on your settings on the [Mandatory Service Setup Page \[pg:1405\]](#) and the Service Measures you have setup to apply to the mandate for each volunteer.

Yes/No

Select the Yes or the No option depending on if you want a progress chart to be displayed or not.

### *Display chart after volunteer completes mandatory service*

Use the dropdown list to select whether or not the chart will appear after the mandate has been completed. You can select *No* or a monthly interval from 1 to 6 months.

### **Headings and Instructions for the Service History Tab in VicNet**

If your account uses the [VicNet \[pg:1724\]](#) module, use this section to customize the headings and instructions volunteers will see when they select the tab.

#### *Mobile text for tab:*

This field shows the name that will be used for the expanding menu when volunteers use the mobile friendly version of VicNet. You can learn more about these settings in the *Expanding Menu Items* section of [help topic 1214 \[ \]](#).

The text in the *Mobile text for tab* field is also what is used in the *full-site* view if the user has a screen reader or has their web browser set up to show alternate (alt) text when their cursor hovers over the tab image.

Click the *Restore default* link to return the tab's alternate text to its default of "My Service History."

Note that the text entered in this field will not change the name of the tab in the

#### *full-site*

view because the name is actually part of the tab image file. Entering a label here will only change the text displayed in the box that appears on the screen when you hover the cursor over the tab name, and the name displayed for the tab in the expanding menu for the mobile view of VicNet. To change the actual appearance of the tab in the full-site view, you will need to upload a new graphic file for the "My Service History" tab. You can use the [VIC Graphics \[pg:1451\]](#) setup page to upload a new tab image.

#### *Instructions*

Type or [paste \[pg:0063\]](#) any instructions you want the volunteers to see on the tab. Please note that this field will only accept plain text so there is not a way to add hyperlinks or other HTML features to the instruction field.

#### *Locate these instructions at the...*

These settings control where the instruction field will appear on the My Service History tab. Select *Top of the tab* if you want the instructions to appear at the top of the page. Select *Bottom of the tab* if you want the instructions to appear at the bottom of the page.

### **Heading and instructions for the Service History screen at VicTouch**

If your account uses the [VicTouch \[pg:1778\]](#) module, use this section to customize the heading and instructions volunteers will see when they view their service. Please remember, if you make changes to these fields and VicTouch is running, you will need to shut down VicTouch and restart it in order for the changes to be shown. If VicTouch is running in kiosk mode as recommended, you may find [help topic 2283 \[pg:1762\]](#) useful to shut the module down.

#### *Page heading*

Use this field to customize the heading volunteers see when they select to view their service through VicTouch. By default, this will read "Service history for" and then insert each volunteer's name. So if a volunteer named George Bailey views this field, he would see "Service History for George Bailey." You can customize the portion of the heading that precedes the word "for" to be something other than "Service history."

## Additional instructions

Type or [paste \[pg:0063\]](#) any instructions you want the volunteers to see on the page. Please note that this field will only accept plain text so there is not a way to add hyperlinks or other HTML features to the instruction field.

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# Customizing VIC Mobile Graphics & Styles

Help topic 1214

Added or revised 08-04-2015

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Organizations may customize the graphic images and styles volunteers and [Coordinators \[pg:0163\]](#) see when they use [VicNet \[pg:1724\]](#) on a mobile device such as a smart phone or tablet. You may wish to do this if you want a truly "branded" and integrated look. Or you might want to do this to tailor the user's experience on their mobile device.

### Please note:

To make the user's VicNet experience mobile friendly, certain options available with the *full-site* setup for VicNet are not available. For example, the options to layout the [Home tab \[pg:1486\]](#) in three vertical columns and to have the schedule display in a calendar format are not available. If your full-site setup uses these display options, the mobile view of VicNet will automatically convert them into a mobile friendly format. We recommend previewing the user's VicNet experience as shown in [help topic 2159 \[pg:1705\]](#) to make sure VicNet displays how you want it to for mobile users.

To get to the setup page where you can customize VicNet for mobile devices:

1. Select [Setup \[pg:0887\]](#) from the menu.
2. Expand the VicNet link.
3. Select *Mobile Graphics & Styles*.

The settings for the mobile view of VicNet are different than the settings for the *full-site* view of VicNet. The full-site view is what users see if they login to VicNet on a desktop or laptop computer. If you want to change the full-site view's graphics and styles:

- See [help topic 1187 \[pg:1353\]](#) to update the logo.
- See [help topic 1052 \[pg:1330\]](#) to update the fonts and background colors.
- See [help topic 1075 \[pg:1451\]](#) to update the button and tab graphic images.

You can click on a link in the *Contents* box to go directly to a section of the help topic.

### Contents

Volunteers and coordinators can...  
Organization Logo (specifically for mobile VicNet)  
Colors  
Expanding Menu Items  
Buttons  
Instructions

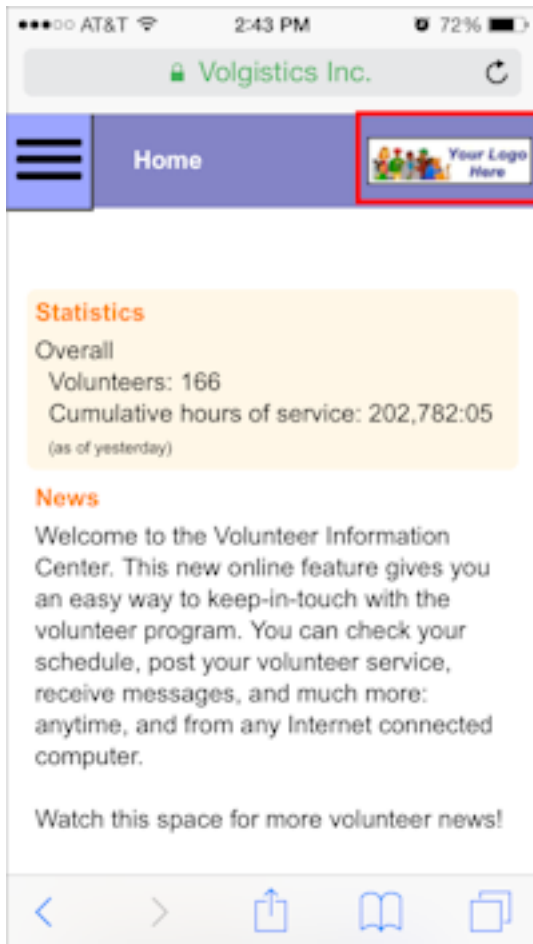


## Volunteers and coordinators can...

By default this box is checked so that your volunteers and Coordinators will see the option to sign-in to the mobile friendly view of VicNet at the volunteer portal when they are using a device such as a mobile phone or tablet. If you do not want your volunteers and Coordinators to be able to access the mobile view, uncheck the box in front of *Access the mobile version of VicNet* and then click the **Save** button.

## Organization Logo (specifically for mobile VicNet)

You will need to upload a separate image file if you want your organization's logo to appear on the mobile view of VicNet. When a file has been uploaded, it will appear in the top right corner of the VicNet page.



You may want to reduce the dimensions and optimize your organization's logo file that was used for the *full-site* version. This is because larger image files increase loading times, plus your volunteers and Coordinators may pay for their data plans with their wireless carrier. Most graphic or photo editing software programs or services have options to change a file's dimensions and to optimize the file when it is saved. Optimizing the file reduces the amount of resources required to store the file, as well as the bandwidth required to transmit the file.

There are not any height or width restrictions for the images, but the file size itself cannot exceed 48 KB. Acceptable file formats for the logo are GIF, JPG, or PNG.

To upload an image file:

1. Click the **Choose File** or **Browse** button.
2. Select the image file you want to upload and click the **Open** button.
3. Click the **Upload** button.

## Colors

This section allows you to customize the colors used for the VicNet display when it is viewed from a mobile device. The default values use the colors from the Volgistics system. You can optionally choose a different color for the different elements of the VicNet mobile display. If your organization has a web master who maintains your website, you may be able to contact him or her to find the values to enter to customize the display with your organization's color schemes.

Enter font colors in RGB color notation (see "*A note about RGB color notation*" below for a description of RGB color notation). You can also click in the field to bring up a color picker that you can use to select the color.

### A note about RGB color notation

There are several fields on this page for setting background and font colors. Enter color information in these fields using standard hexadecimal RGB color notation. This is the color notation used in HTML (Hypertext markup language) to specify color attributes for web page elements. Hexadecimal RGB color notation includes the '#' character followed by a six character RGB color value in hexadecimal notation (hex).

These are some examples of this notation:

#FFFFFF (white)

#000000 (black)

#FF0000 (red)

#00FF00 (green)

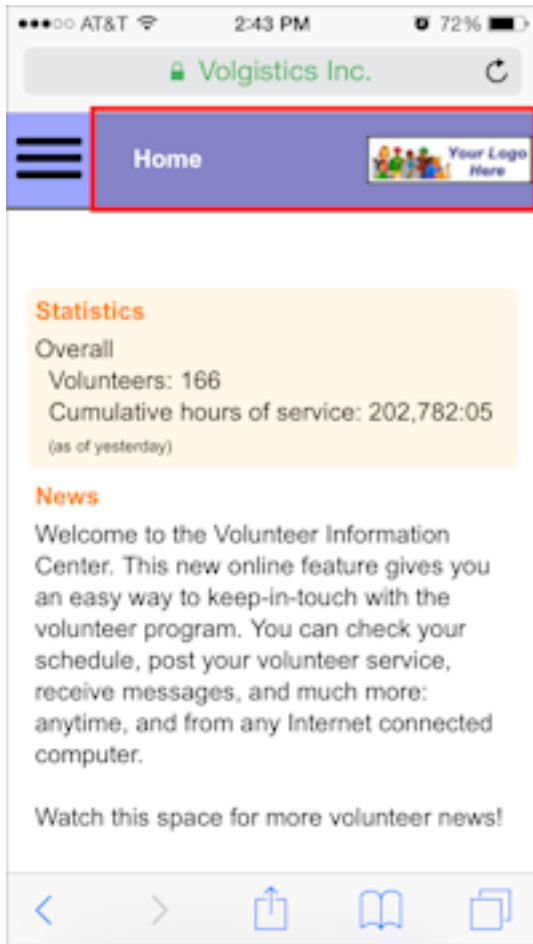
If you click on the field itself, a color picker will appear that makes it easy to select the color you need. You can also learn more about hexadecimal RGB colors for websites at [w3schools.com](http://w3schools.com)

Your color choices will be shown in the mock-up section to the right as you make the changes. You can also preview the mobile display for volunteers or Coordinators. [Help topic 2159 \[pg:1705\]](#) shows how to do this. *Remember to click the **Save** button when you are done selecting your color choices!*

Here is more information about what each color selector field will change for the VicNet mobile display:

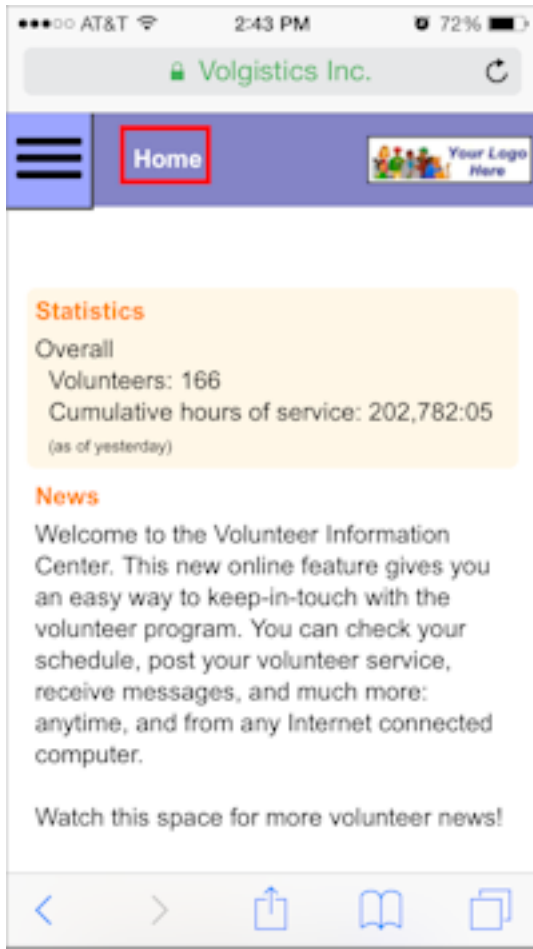
### Header section: Background color

This controls the color used in the header at the top of the screen.



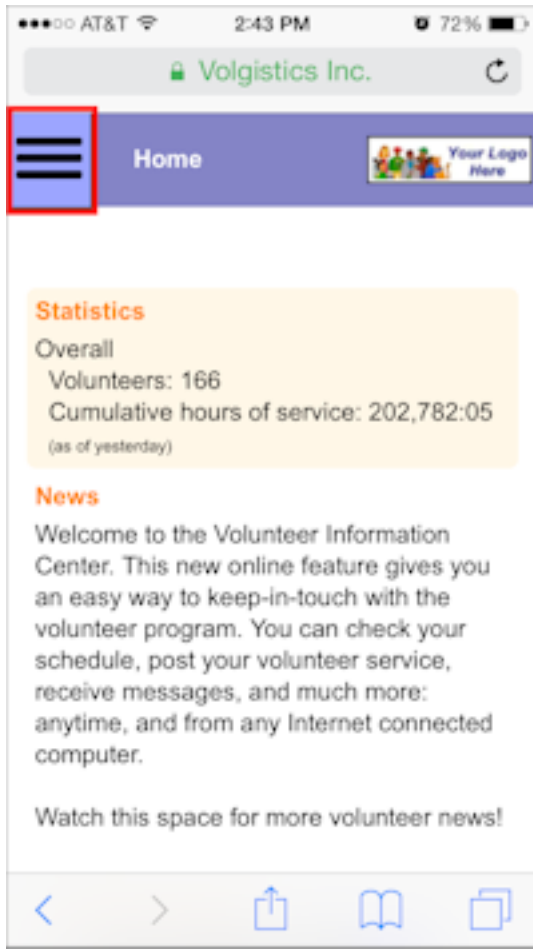
**Header section: Font color**

This controls the color of the text that appears in the header at the top of the screen.

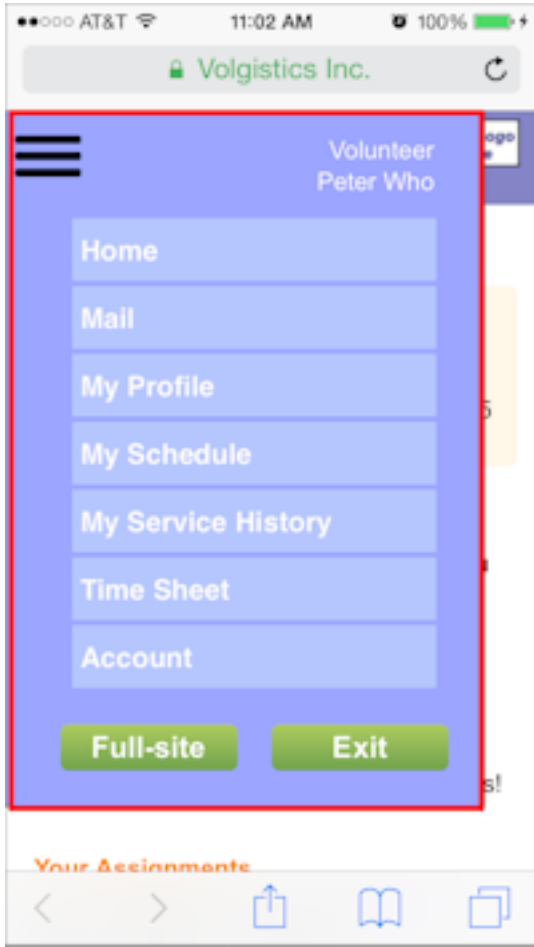


**Expanding menu: Background color**

This controls the color of the menu users tap to see their choices to navigate. When the menu is collapsed, this is the small box in the top left corner of the header section.

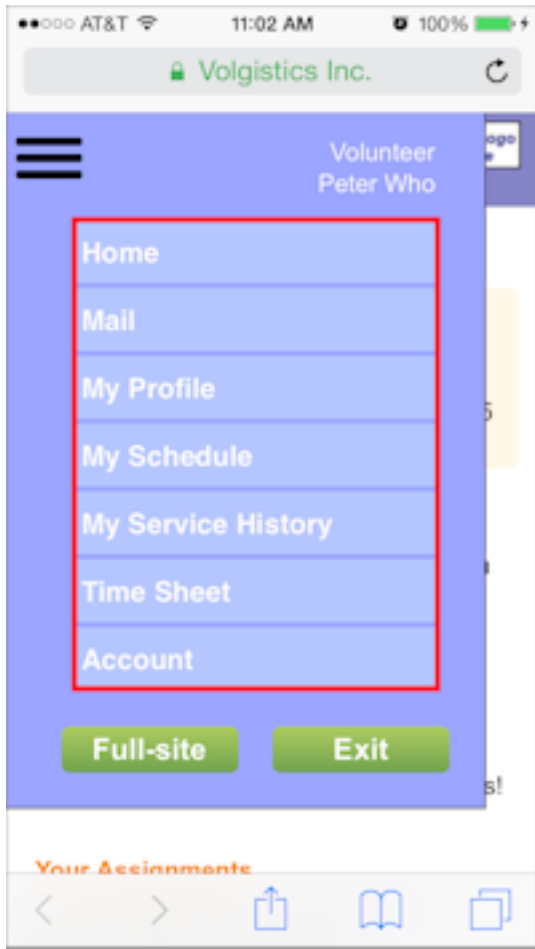


When the user taps the menu, it expands to fill more of the screen so users can tap the area they want to navigate to.



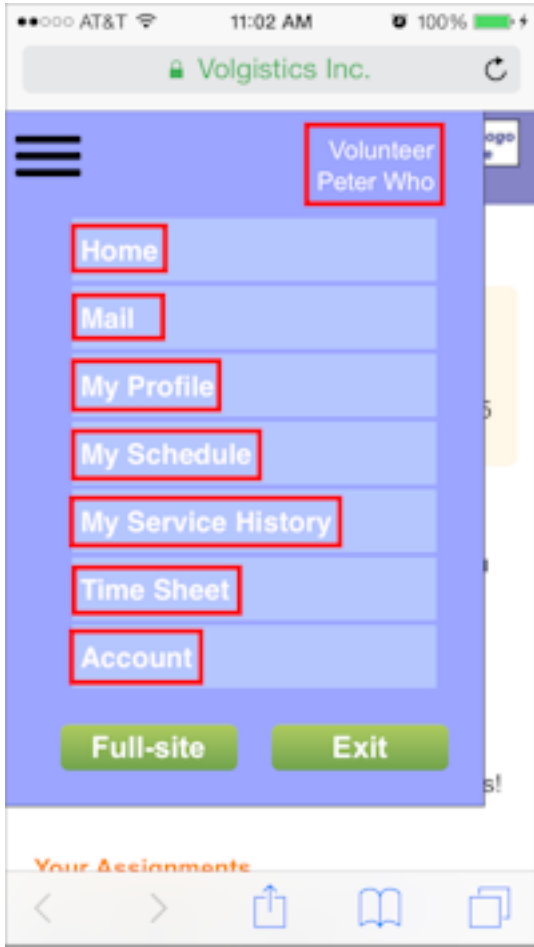
**Expanding menu:** Background color of buttons

This controls the color of the buttons on the expanding menu.



**Expanding menu: Button font color**

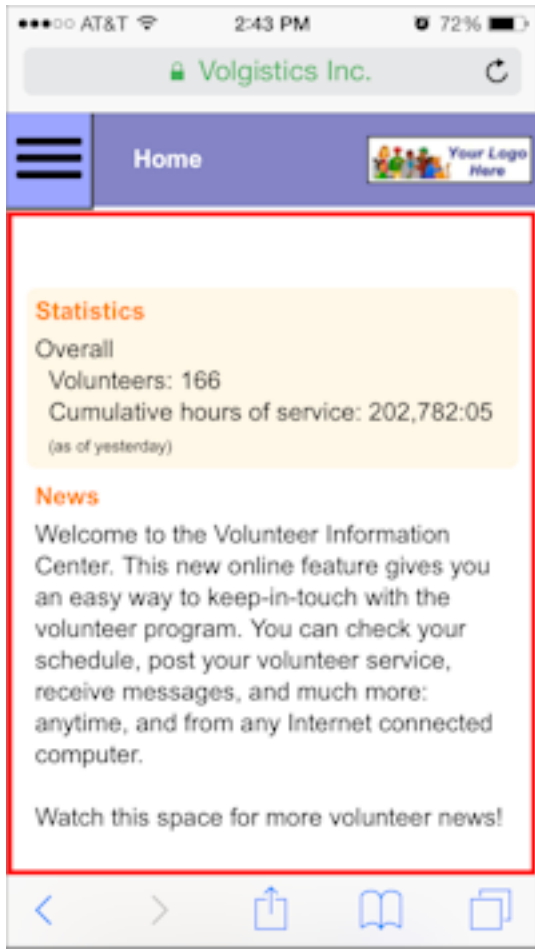
This controls the color of the text labels on the buttons that users tap to navigate to a certain area. It also controls the color of the text used for the user identification label.



**Main section:** Background color

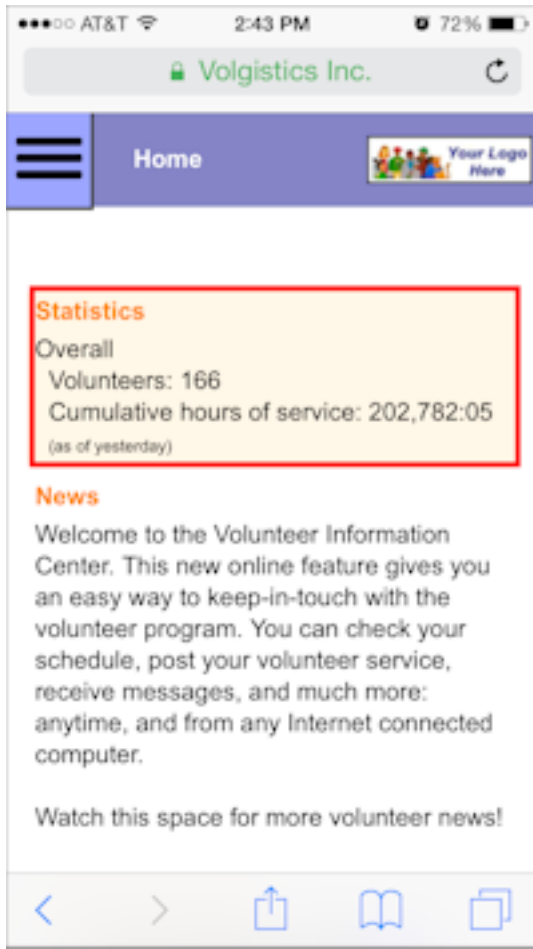
This controls the color of the section that appears under the top header.





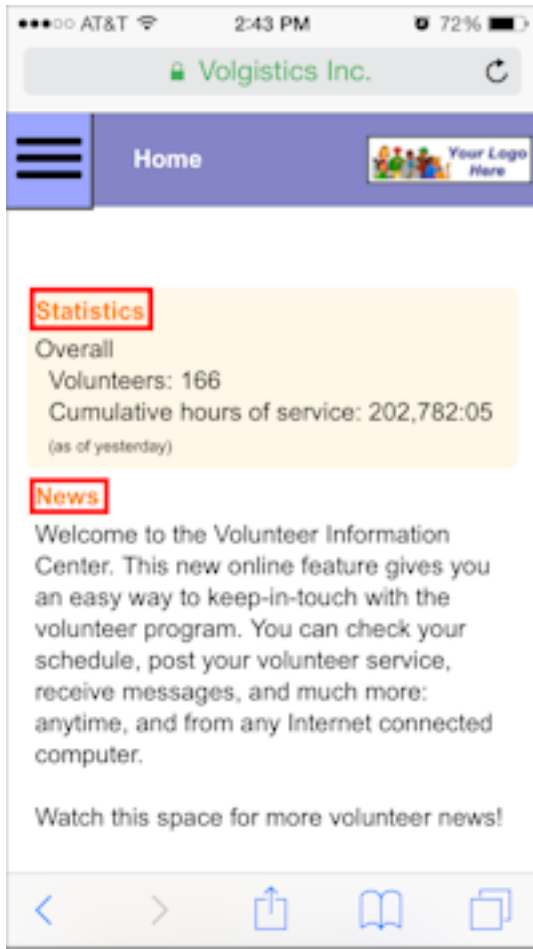
**Main section:** Background color of boxes

This controls the color used in the background on any boxes that appear in the main section.



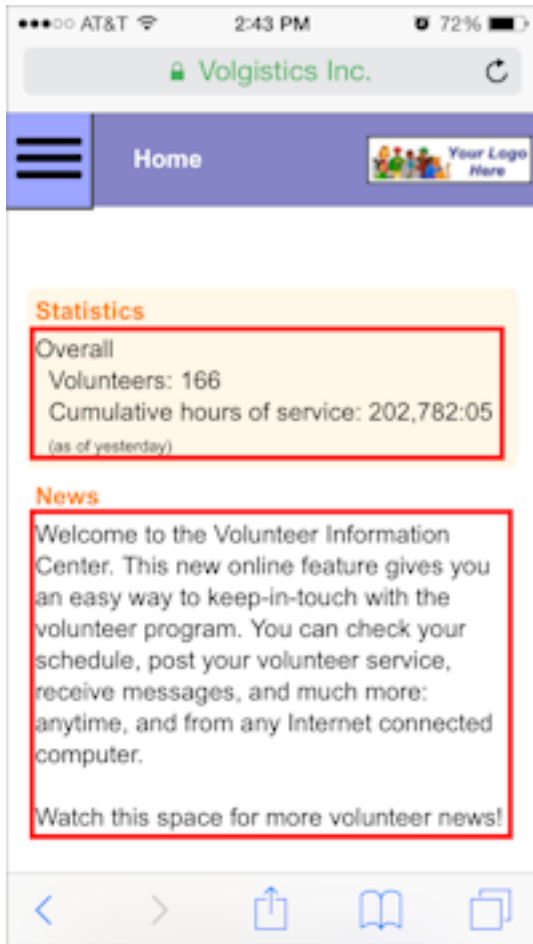
**Main section:** Color of heading fonts

This controls the color of the text used for each section's heading.



**Main section:** Color of body fonts

This controls the color of the text used for the body paragraphs in the sections.



## Expanding Menu Items

The names for the items in the expanding menu are originally taken from the *Mobile text for tab* field on each tab's setup page. The seven default tabs for volunteers are:

- Home
- Mail
- My Profile
- My Schedule
- My Service History
- Time Sheet
- Account

**Coordinators** [pg:0163] may have access to the Home, Mail, My Schedule, and Account tabs, as well as a Volunteers tab.

**Please note:** The list will contain text for each item even though you may have a tab setup so that the users do not have access to the tab in the full-site view of VicNet. If this is the case, the item will not appear in the Expandable Menu in the user's mobile view for VicNet.

If you already have a different name recorded in the *Mobile text for tab* field on the tab's setup page, this will appear instead of the default text.

You can change an item in the expandable menu by placing your cursor in the field, deleting the current text, and then entering in the new text. Be sure to click the **Save** button to keep your changes.

**Please Note:**

The text entered in the

*Expanding Menu Item*

fields will not change the name of the tabs that appear when volunteers and Coordinators view the

*full-site*

view of VicNet. Entering a label here will change the text displayed in the Expandable Menu when users view the mobile version of VicNet, as well as the name used for screen-readers and alternate (alt) text in the full-site view.

For the

*full-site*

view of VicNet, the tab names are actually part of the image files used for each tab. If you'd like to change the tab name for the full-site view, you will need to upload new image files for the tab that have the new tab name you'd like. You can find more information on this in [help topic 1075 \[pg:1451\]](#)

*To help prevent confusion for your users, we recommend that the expanding menu items in the VicNet mobile view match the names on the tab graphics used for the full-site view of VicNet.*

**Buttons**

Organizations may customize any of the graphic images for the buttons that appear in the mobile view of VicNet. Volgistics does not include any graphic or image editing software, but there are a variety of sources you can use to create graphic images. These include programs that come with your operating system, software you purchase or download from software vendors, and online image editing or button generator programs.

Some general things to keep in mind if you want to customize the graphic images are:

File Formats

Custom images must be in one of these graphic file formats: GIF, JPG, or PNG. You will get the best results with files saved in PNG format.

Maximum Dimensions

Each graphic image has a maximum height and width in pixels. Your files can be a maximum of 350 pixels wide and 100 pixels high. You may need to preview the mobile view of VicNet to make sure the button images look like you want them to. If they do not, you will need to re-size the image using whatever outside program you have for image files. After you do this, upload the re-sized image to Volgistics.

Maximum Size

To ensure fast load times for the VicNet mobile pages, each graphic image has a maximum image file size in bytes. The button images must be 6,144 bytes (6 KB) or smaller. When you save your files, most image editing programs have an option to optimize the file to reduce the file size.

### Background Color

Your custom images should either have a transparent background, or use the same background color as your forms. You can learn how to customize the color for the VicNet mobile view in the Colors section above.

### Graphic Image Rights

You can copy and modify the default graphic images that are part of Volgistics, as long as you use these images in Volgistics only. Volgistics does not grant rights to use its images for any other purpose, or for use outside of Volgistics.

If you're using graphic images you've obtained from other sources, you must be certain that you have the legal right to use those images. Unless an image is offered for use without restriction, most of the graphic images that appear on the web are protected by copyrights. Be certain you have the proper rights before installing custom graphics you have obtained from others.

### Installing New Button Graphics

Once you have your new image file for the button you want, you can install it by:

1. Click on the button that you would like to replace.
2. Be sure the radio button is on *Install a new graphic*, and click the **Choose File** or **Browse** button.
3. Find the file you want to upload and select it. Then click the **Open** button.
4. Click the **Install** button.

## **Instructions**

The instruction fields that appear on the tabs in the *full-site* view of VicNet will be used for the instruction fields on the mobile view also. You may want to modify the instructions that are used so that they apply to both instances.

The Expanding Menu Items section above lists the possible tabs for volunteers and Coordinators. To review the instruction fields and edit them if necessary, you will need to go to the setup page for the tab that you want to review and/or modify. Here is an example of how to do this for the *Home tab*:

1. Select [Setup \[pg:0887\]](#) from the menu.
2. Expand the VicNet link.
3. Select the *Home tab* (or whichever tab you want to review and/or modify).
4. Review the content in the instruction fields and make sure it makes sense for users in both the full-site and mobile views. If it does not, make any changes necessary. It may help to preview the mobile and regular views volunteers and Coordinators see. [Help topic 2159 \[pg:1705\]](#) shows how to do this.
5. Click the **Save** button to keep the new content in the instructions fields if you made changes.

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## VicNet Home Tab

Help topic 2019

Added or revised 12-19-2016

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When volunteers and Coordinators visit [VicNet \[pg:1724\]](#), the first tab they see is the Home tab. The Home tab serves as a general information page. You can use the Home tab to communicate with volunteers and [Coordinators \[pg:0163\]](#); post volunteer news; promote your organization's activities; provide links to newsletters, policies, or forms; and even advertise if you want to.

Because the Home tab is accessible only to registered volunteers and Coordinators through VicNet, you can use it to publish information or links that you might not want to make generally available to anyone on the Internet.

This help topic explains what features are available on the VicNet Home tab and how to customize them. You customize the VicNet Home tab on the VIC Home Tab setup page. If you're not already on this page (and you have access to [Setup \[pg:0887\]](#)) you can get to the VIC Home Tab setup page by choosing Setup from the menu, selecting VicNet, and then choosing the *Home tab* link.

Click a link in the Contents box below to be taken directly a section of the help topic.

### Contents

News

Assignments

Link Buttons

Statistics Box

Message Boxes 1 - 4

Document Link Boxes 1 - 4

Instructions

[Mobile text for tab:](#)

At the top of the page before the

*News*

section you will see the

*Mobile text for tab*

field. This field shows the name that will be used for the expanding menu when volunteers use the mobile friendly version of VicNet. You can learn more about these settings in the *Expanding Menu Items* section of [help topic 1214 \[\\_\\_\\_\\_\\_\]](#).

The text in the *Mobile text for tab* field is also what is used in the *full-site* view if the user has a screen reader or has their web browser set up to show alternate (alt) text when their cursor hovers over the tab image.

Click the *Restore default* link to return the tab's alternate text to its default of "Home."

Note that the text entered in this field will not change the name of the tab in the

*full-site*

view because the name is actually part of the tab image file. Entering a label here will only change the text displayed in the box that appears on the screen when you hover the cursor over the tab name, and the name

displayed for the tab in the expanding menu for the mobile view of VicNet. To change the actual appearance of the tab in the full-site view, you will need to upload a new graphic file for the "Home" tab. You can use the [VIC Graphics \[pg:1451\]](#) setup page to upload a new tab image.

## News

Use the *News* section to post a general news announcement. All volunteers and Coordinators see the News section on the Home tab.

### Omit News

Check *Omit news* if you do not want the News section to appear on the Home tab.

### Heading

Enter the heading you want to appear above the News section. The default heading is "News."

### Text

Use this space to type (or [paste \[pg:0063\]](#)) the news you want to appear. To change an existing news message, delete the existing message and then type (or [paste \[pg:0063\]](#)) the new message in this space.

### Column

Choose which column you want the News section to appear in on the Home tab. Your Home tab may have up to three columns: left, center, and right.

### Border

Check *Border* if you want this section to have a border around it.

## Assignments

Your VicNet Home tab may optionally include a box that shows volunteers a list of their assignments. This section is purely informational. Volunteers cannot change their assignments here. It is simply a reminder of what the volunteer's assignments are in your organization.

**Please note:** This list is populated based on the assignments the volunteer has a [Role \[pg:0103\]](#) in. This is different than assignments the volunteer is scheduled in. In many cases volunteers are scheduled in assignments they have a Role in, but not always. A volunteer may have a Role in an assignment but not be scheduled in that assignment, or vice versa.

This box will not appear for Coordinators because they cannot have a Role in an assignment.

### Omit Assignments

Check *Omit Assignments* if you do not want the Assignments section to appear on the Home tab.

### List assignments for these Roles

The Assignments section will list the assignments a volunteer has if their [Role \[pg:0103\]](#) in an assignment is one of the Roles you check here. For example, if you want the Assignments section to list only the assignments for which a volunteer is *assigned*, check only the *Assigned* Role here. You set a volunteer's Role in an assignment on the [Service tab \[pg:0138\]](#) tab in their volunteer record.



## Column

Choose which column you want the Assignments section to appear in on the Home tab. Your home tab may have up to three columns: left, center, and right.

## Border

Check *Border* if you want this section to have a border around it.

## **Link Buttons**

Link buttons provide an alternate way for volunteers and Coordinators to navigate within Volgistics from the Home tab. Check any of the optional link buttons that you want to appear on the Home tab. The possible link buttons are:

- Check your schedule: takes the volunteers and Coordinators to the [My Schedule \[pg:1453\]](#) tab.
- Post your hours: takes the volunteer to the [Time Sheet \[pg:1460\]](#) tab. This button is not available for Coordinators because they cannot access the Time sheet tab. It will also not appear if the volunteer cannot access the Time Sheet tab.
- Check messages: takes the volunteers and Coordinators to the [Mail \[pg:0315\]](#) tab.
- Sign-up: takes the volunteer to the [My Schedule \[pg:1494\]](#) tab where they can sign-up for assignments. This button is not available for Coordinators because they cannot self-schedule for assignments.
- Text message opt-in: takes the volunteers and Coordinators to the *Account* tab so they can [opt-in to text messaging \[pg:0323\]](#). You will not be able to select this link button if your account does not have [text messaging enabled \[pg:0321\]](#).

## Column

Choose which column you want the Link Buttons to appear in on the Home tab. Your home tab may have up to three columns: left, center, and right.

## **Statistics Box**

The Statistics box provides a "score-board" that shows the total number of volunteers and the total number of hours recorded for your entire organization. There is not a way to make this show statistics for just the individual volunteer. However, volunteers can see their individual statistics on the *My Service History* tab in VicNet. You can use the Statistics box as a motivational tool by showing the growth of your volunteer program.

## Omit Statistics box

Check *Omit Statistics box* if you do not want the Statistics box to appear on the Home tab.

## Include:

Check the statistics you want to include in the Statistics box. The *volunteer count* is the total number of [non-archived \[pg:0709\]](#) records in your database. *Cumulative hours* are the sum of all of the hours recorded in your database as of yesterday.

## Column

Choose which column you want the Statistics Box to appear in on the Home tab. Your home tab may have up to three columns: left, center, and right.

## Border

Check *Border* if you want this section to have a border around it.

## **Message Boxes 1 - 4**

Your VicNet Home tab may include up to four Message boxes. These are flexible graphic and text boxes you can use for a variety of purposes, such as promoting your organization's activities, posting advertisements, creating links to other web sites, and more. Each message box may include an optional heading, text message, graphic image, and link.

## Omit Message box

Check *Omit Message box* if you do not want this Message box to appear on the Home tab.

## Heading

If you want this Message box to include a text heading, enter it here. Leave this field blank if you do not want a heading.

## Top text

If you want this Message box to include a text message, enter (or **paste [pg:0063]**) it here. If this Message box will include a graphic image, the text you enter here will appear above the image.

## Graphic image

If you want this Message box to include a graphic image, click the **Change image** button to load the image file. If you do not want this Message box to include a graphic image, check the *Omit the image* checkbox.

Message box images must be in a GIF, JPG, or PNG file. The image may up to 500 pixels high and 200 pixels wide, with a maximum file size of 20 Kb.

## Bottom text

If this Message box will include a graphic image, and you want a message to appear below the graphic, enter (or **paste [pg:0063]**) the text you want to appear below the graphic here.

## Link

If you want this message box to be an HTML link to another web page, enter the complete web site address you want to link to in this field. If a visitor clicks the heading, text, or image in this Message box, a new browser window or tab will open to the web page you specify here. This is an example of a complete web site address:

<https://www.volgistics.com/Free-Trial.htm>

Use this capability to create HTML links to web pages on your own web site, link to web pages for training, or to create links to an advertiser's web site if you choose to use a Message box for an advertisement.

Leave this field blank if you do not want this Message box to link to another web page.

## Column

Choose which column you want each Message box to appear in on the Home tab. Your home tab may have up to three columns: left, center, and right.

## Border

Check *Border* if you want this Message box to have a border around it.

## **Document Link Boxes 1 - 4**

Your VicNet Home tab may include up to four Document link boxes. Each document link box may contain one or more HTML links to [PDF documents \[pg:0449\]](#) you've uploaded to the [Documents tab \[pg:0388\]](#) in your Volgistics Mailbox. Use link boxes to post links to current or past issues of volunteer newsletters; forms; policies and procedures; and other related documents you want to make available to volunteers and Coordinators from the Home tab as PDF files.

Instructions for uploading PDF documents are available in [Help Topic 2142 \[pg:0388\]](#). You must upload the PDF document(s) before you can create a link to that document from the Home tab.

Volunteers must have Adobe Reader to view PDF files. Adobe Reader is available free-of-charge from Adobe, and comes pre-installed on most computers. Document link boxes may be used to provide links to files in the PDF format only.

## Omit this box

Check *Omit this box* if you do not want this Document link box to appear on the Home tab.

## Heading

If you want this Document link box to include a text heading, enter it here. Leave this field blank if you do not want a heading.

## Text

If you want this Document Link box to include instructions or a text message, enter (or [paste \[pg:0063\]](#)) it here.

## Column

Choose which column you want this Document link box to appear in on the Home tab. Your home tab may have up to three columns: left, center, and right.

## Border

Check *Border* if you want this Document link box to have a border around it.

## Document links:

If you previously added links for this Document link box, they are listed here.

For each existing link you'll see the link text and the name of the PDF file that the link is to. Click the **Remove** button next to an existing link if you want to remove that link from this Document link box. If this Document link box has more than one link, click the **Move up** button if you want to move a link up one item on the list of links. If this Document link box has more than one link, click the **Move down** button if you want to move a link down one item on the list of links.

## Add a new link:

To add a new link to this Document link box:

1. Enter the text for the link in the *Link text* field. For example, if you want the link to read "Fall 2016," enter "Fall 2016" here.
2. Choose the name of the PDF file you want to link to from the PDF File dropdown list. For example, if you want this link to go to your Fall 2016 volunteer newsletter, select the PDF document that contains your Fall 2016 newsletter. You must have previously uploaded a PDF document in order to choose it from this dropdown. Instructions for uploading PDF documents are available in [Help Topic 2142 \[pg:0388\]](#).
3. Click the **Save** button beneath the PDF File field to save the new link.

## Instructions

You can optionally include text instructions for the Home tab. Your instructions may appear at either the top or the bottom of the tab.

### Display these instructions on the Home tab for volunteers:

Use this space to enter (or [paste \[pg:0063\]](#)) any Home tab instructions you'd like to appear for *volunteers* who visit the Home tab.

### Locate these instructions at the...

Choose where you would like your volunteer instructions to appear on the Home tab.

### Display these instructions on the Home tab for Coordinators:

Use this space to enter (or [paste \[pg:0063\]](#)) any Home tab instructions you'd like to appear for *Coordinators* who visit the Home tab.

### Locate these instructions at the...

Choose where you would like your Coordinator instructions to appear on the Home tab.

Except for the Assignments section (which lists a volunteer's own assignments), and the Instructions section, all volunteers and Coordinators see the same Home tab when they visit VicNet. If you have information you want to send to certain volunteers only, [send a VIC mail message \[pg:0404\]](#) to just those volunteers and they will see your message on the VicNet Mail tab.

## Related help

[Help topic 2288 \[pg:1723\]](#) - Advertising on VicNet

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## Creating Links to VicNet

Help topic 2153

Added or revised 02-02-2010

---

Note: If you work with a web site developer, consider printing a copy of this help topic to give to them. It contains instructions they need to add VicNet to your web site.

Volunteers access [VicNet \[pg:1724\]](#) through a link on your organization's own web site. This brings traffic to your web site, and it's the logical place on the Internet for your volunteers to go to when they want to interact or check their records.

You can integrate VicNet with your own web pages so it appears to volunteers and other visitors to be part of your web site. You can also 'brand' (call) VicNet something other than 'VicNet' or the 'Volunteer Information Center' if you choose to, although you are welcome to use these terms if you'd like. You can also customize the appearance of VicNet by setting your own fonts, background colors, and graphics; so it matches the graphic style of your web site.

Adding VicNet to your web site can be as simple as adding a single HTML "hyperlink" to a web page. You can locate your link anyplace you'd like on your web site; and you can have multiple links to VicNet from several different locations on your web site if you want to.

You customize the way VicNet looks and works from within the Volgistics program. This means that once you've added a VicNet link to your web site, you can customize or alter the way VicNet works without having to make any changes to your web site. The person who maintains your web pages only needs to add the link: they do not necessarily need to be involved in customizing VicNet.

### **Full-page vs. Embedded**

There are two ways to add VicNet to your web site, the 'Full-page' method and the 'Embedded' approach. Each has advantages.

With the full-page method, VicNet fills an entire browser window. You can open VicNet in the same browser window as your web site; or you can open VicNet in a new browser window on-top of the window that contains your web site. This is the easiest way to add VicNet to your web site; however it may not appear as integrated as the embedded approach. To add VicNet using the Full-page method you (or your web developer) simply add a hyperlink to your web page (something that should not normally take more than a few minutes to complete).

With the embedded approach, you open VicNet in an HTML "frame" (or "Iframe"), with other elements of your own web site displayed in other frames above, beside, and/or below the VicNet form. This provides greater integration than the full-page method because the visitor will continue to see parts of your web site – such as menus and borders – while they're using VicNet; however it requires the use of HTML 'frames' on your web pages, and more work on the part of the person who develops your web site.

### **Important**

The HTML links described in this help topic include your account's *public account identifier* **not** your nine digit *account number*. Be sure you include your *public account identifier* and **not** your nine-digit *account number* where indicated in these links.

The *public account identifier* is different than your nine digit *account number*. The public account identifier is used in this link instead of your actual nine-digit account number for security purposes (using this public account identifier keeps your account number private).

### **Creating HTML links to VicNet**

To add VicNet to your web site using either the full-page method or the embedded approach you add an HTML hyperlink to the following Internet location:

<https://www.volgistics.com/ex/portal.dll/?From={public account identifier}>

You replace {public account identifier} with your Volgistics account's "public account identifier."

To find your public account identifier:

1. Choose Setup from the [menu \[pg:0215\]](#).
2. Select VicNet.
3. Choose [Ground Rules \[pg:1447\]](#).
4. Your public account identifier is listed near the bottom of the page.

For example, if your public account identifier were "1234," links to VicNet for your account would be

<https://www.volgistics.com/ex/portal.dll/?From=1234>

When creating HTML links to VicNet, be certain you type the web address exactly as shown above (except with your own public account identifier rather than 1234) . The link won't work if it has misspellings, extra spaces, or it's missing *your* public account identifier.

### Full-page links

You can create links to VicNet that will open in the full-page mode two ways. The first way, shown in the example below, opens VicNet in a new browser window. When a volunteer is finished and closes the VicNet window, they will return to your own web page.

```
<A HREF="https://www.volgistics.com/ex/portal.dll/?From=1234" target="_blank">Volunteer Information Center</A>
```

The hyperlink show above will appear on your web page like this:

[Volunteer Information Center](https://www.volgistics.com/ex/portal.dll/?From=1234)

You can replace the words 'Volunteer Information Center' in this link with any other words you'd like; such as 'click here to check your records,' or 'Volunteers login here.'

If you want your VicNet link to be a 'clickable' image rather than words, that's easy too. Just add an image to the link using an HTML <IMG> tag, as shown in this example:

```
<A HREF="https://www.volgistics.com/ex/portal.dll/?From=1234" target="_blank"><IMG SRC="{path to any image you choose}"></A>
```

The second way to create links to VicNet in the full-page mode is to open VicNet in the same browser window as your own web page. You can configure your online form return navigation settings so a volunteer will return to your web site when they close VicNet. Here's an example of this kind of link:

```
<A HREF="https://www.volgistics.com/ex/portal.dll/?From=1234">Volunteer Information Center</A>
```

### Embedded links

If you want to create links to VicNet that are embedded in your own web page, simply include the following flag in the url:

**&Embedded=on**

For example:

**<https://www.volgistics.com/ex/portal.dll?From={public account identifier}&Embedded=on>**

Once again, be sure to replace {public account identifier} with your Volgistics account's "public account identifier." If your public account identifier were "1234" for example, embedded links to VicNet for your account would be

**<https://www.volgistics.com/ex/portal.dll?From=1234&Embedded=on>**

You would typically use the embedded link style when opening VicNet inside an HTML 'frame' or 'iframe.' An example of how your VicNet link would appear as the source for a frame is shown here:

**<FRAME SRC="https://www.volgistics.com/ex/portal.dll?From={public account identifier}&Embedded=on">**

How to build web pages that contain frames is beyond the scope of this help system, however these are a few tips:

- Use a borderless frame
- Set the padding style for the frame so the form is offset from the frame edges. In this example, VicNet will appear with a 10pt margin on each side and no frame border.

**<FRAME SRC="https://www.volgistics.com/ex/portal.dll?From={public account identifier}&Embedded=on" STYLE="padding: 10pt; border: 0pt;">**

---

## VIC Self-Scheduling

Help topic 2170

Added or revised 04-07-2017

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With Volgistics, you can allow your volunteers to schedule themselves through the [VicNet \[pg:1724\]](#) and/or the [VicTouch \[pg:1778\]](#) module. This help topic has information on how to setup and manage this feature in your account. There are two ways to display self-scheduling: the list format and the calendar format. With VicTouch, only the calendar format is available.

### **Please Note:**

*The calendar and list format options are only available for the full-site view of VicNet. This is the view shown when users access the system from a desktop or laptop computer. If the user is accessing the system from a mobile device (such as a smart phone or tablet), and you have VicNet mobile enabled, your selections on the VIC Self Scheduling setup page will be changed to a mobile friendly format. You can learn more about VicNet Mobile in [help topic 1214 \[pg:1471\]](#).*

If you're not already on the VIC Self Scheduling setup page, you can get there by:

1. Select [Setup \[pg:0887\]](#) from the menu.
2. Expand the *VicNet* or *VicTouch* link.
3. Select *Self scheduling*

You can click a link in the *Contents* box to go directly to a section of the help topic.

## **Contents**

### Allow volunteers to self-schedule

#### Offer schedules using a list format

List schedule openings between these dates

Volunteers must sign up for a minimum of (X) shifts between these dates

Volunteers cannot sign-up for more than (X) shifts between these dates

#### Offer schedules using a calendar format

The *Help Wanted* Icons Do Not Appear on the Calendar

Limit volunteers to scheduling themselves for no more than (X) shift(s) per day

Limit the number of shifts a volunteer may schedule themselves for through self-scheduling to a total of (X) shift(s)

How far in advance should volunteers be allowed to schedule themselves?

Allow volunteers to self-schedule on holidays in assignments that permit self-scheduling for "any times?"

Show the number of volunteers still needed for each opening

Confirmation Page

### Allow volunteers to remove themselves from schedules

Allow volunteers to remove themselves from the schedule up to (X) day(s) before the date scheduled

### Appearance in VicNet

Sign-up box heading

Large instruction

Small instructions

Confirmation heading

### **Allow volunteers to self-schedule**

This checkbox determines whether or not the self-scheduling features are available to your volunteers. When this checkbox is checked, volunteers can access the self-scheduling features through VicNet and/or VicTouch. When this checkbox is not checked, volunteers do not have access to the self-scheduling features and cannot schedule themselves.

The remaining settings on this page will have no effect if this checkbox is not selected.

### **Offer schedules using a list format**

This option is appropriate for organizations that want volunteers to see a list of [openings \[pg:0776\]](#) between a certain range of dates. It is particularly useful for special events, performing arts centers and other customers who want volunteers to see a list of possible openings by date. Here is an example of how the list format looks for volunteers:



Volunteer information for **Elsa Raven**

- Home
- Mail
- My Profile
- My Schedule**
- My Service History
- Time Sheet
- Account

**Instructions**

Your regularly scheduled volunteer shifts appear on the calendar. Click the "Next month" or "Previous Month" buttons to view a different month. For a printable view of your schedule click the "Printable view" button.

**Sign-Up!**

Schedule yourself for volunteer duty

	Date	Assignment	From	To	
<input type="checkbox"/> <a href="#">Check to sign-up</a>	October 25, 2016 (Tuesday)	Event Setup [Hill Valley Preservation Society Fundraiser]	12:00 p	1:30 p	Click the "Remove me" button to remove yourself from the schedule for a selected assignment and date
<input type="checkbox"/> <a href="#">Check to sign-up</a>	October 25, 2016 (Tuesday)	Event Tear Down [Hill Valley Preservation Society Fundraiser]	5:00 p	6:30 p	
<input type="checkbox"/> <a href="#">Check to sign-up</a>	October 25, 2016 (Tuesday)	Flyer Distribution [Hill Valley Preservation Society Fundraiser]	2:30 p	5:00 p	
<input type="checkbox"/> <a href="#">Check to sign-up</a>	October 25, 2016 (Tuesday)	Master of Ceremonies [Hill Valley Preservation Society Fundraiser]	2:30 p	4:30 p	
<input type="checkbox"/> <a href="#">Check to sign-up</a>	October 25, 2016 (Tuesday)	Raffle Coordinator [Hill Valley Preservation Society Fundraiser]	3:00 p	4:30 p	
<input type="checkbox"/> <a href="#">Check to sign-up</a>	October 25, 2016 (Tuesday)	Ticket Booth [Hill Valley Preservation Society Fundraiser]	2:30 p	4:30 p	
<input checked="" type="checkbox"/> <a href="#">You are scheduled for</a>	October 25, 2016 (Tuesday)	Flyer Distribution [Hill Valley Preservation Society Fundraiser]	2:30 p	5:00 p	

[Continue](#)

Click Continue to schedule yourself for the assignments and dates selected above

[Printable view](#)

Volunteers check the box by each opening they wish to fill and then click the **Continue** button to schedule themselves. You can setup an alert to go to the [In Box \[pg:0303\]](#) tab of your Volgistics mailbox, and/or to a [Coordinator's \[pg:0163\]](#) email address, to let you know the volunteer added herself to the schedule. This is done on an assignment-by-assignment basis on the [Rules tab \[pg:0781\]](#) of the assignment record.

Some important things to keep in mind when using the list format are:

- The list format will only work with [VicNet \[pg:1724\]](#). If you use both VicNet and [VicTouch \[pg:1778\]](#), volunteers will be able to see their schedule in a calendar format on VicTouch, but they will not be able to self-schedule through VicTouch.
- Volunteers will only see openings in assignments where they meet the criteria set on the [Rules tab \[pg:0781\]](#) of the assignment. If they do not meet the Rules tab criteria, they will not see an option to self-schedule for the assignment.
- With the list format, volunteers can only self-schedule for [openings \[pg:0776\]](#). Even if the [Rules tab \[pg:0781\]](#) of an assignment is setup to restrict self-scheduling to *Any times*, this setting will be ignored. If the assignment has openings in the date range selected, volunteers will be able to self-schedule for the openings.
- Volunteers can select multiple openings to fill at the same time using the list format. They will check the box by each opening they want to self-schedule for, and then click the **Continue** button to self-schedule for all of the openings that are checked.
- Volunteers will not be able to see details about the assignments with the list format. In the calendar format, volunteers can click a link to see information such as the assignment's address or the assignment's description.

- Volunteers will not see a confirmation page with assignment information with the list format. In the calendar format, a confirmation page with assignment details can be shown after volunteers self-schedule.
- Group leaders for [group records \[pg:1909\]](#) will not be able to fill multiple opening slots when self-scheduling is in list format. If this is important, you will need to use the Calendar format for self-scheduling.

Information about each setup option for the list format appears below:

#### List schedule openings between these dates

Enter the date range you want schedule openings to show for. *Please note that if the range is over one month long, volunteers will initially only see openings for the first month. To see openings in the latter months, they will need to click the link for that month.*

#### Volunteers must sign up for a minimum of (X) shifts between these dates

You can require your volunteers to sign-up for *at least* a certain number of shifts in the date range you select. If you want to enforce this, select the minimum they must sign-up for from the dropdown list.

This can come in handy in a circumstance such as if you run a festival and give volunteers free admission in exchange for a certain number of shifts worked. Volunteers will not be able to complete self-scheduling through VicNet until they have selected the number of shifts you specify when they are using the full-site view of VicNet.

#### **Please note!**

This setting is not enforced in [VicNet Mobile \[pg:1471\]](#). When volunteers are signed-in on a mobile device, they will see a warning that they must select a certain number of shifts *but they will still be able to schedule themselves for fewer shifts*. If enforcing this setting is important, you will need to disable VicNet Mobile so volunteers will see the full-site view even if they are signed-in on a mobile device.

#### Volunteers cannot sign-up for more than (X) shifts between these dates

You can prevent your volunteers from signing-up for *more than* a certain number of shifts in the date range you select. To do this, select the maximum number of shifts you want to allow from the dropdown list.

This can come in handy in situations such as if you want all volunteers to have an equal opportunity to sign-up, or you want to prevent possible "burn out" caused by volunteers serving too much. Volunteers will not be able to schedule for more than the maximum in both the full-site and the mobile view of VicNet.

#### **Offer schedules using a calendar format**






When this option is selected, volunteers view the schedule in a monthly calendar format. The calendar format works in both [VicNet \[pg:1724\]](#) and [VicTouch \[pg:1778\]](#) except where noted. VicNet is shown in the examples because it is used more routinely for self-scheduling.

The calendar shows the current month by default, but if you want the calendar to show a future month you can change the default on the [Scheduling Ground Rules \[pg:1392\]](#) page.

With the calendar format, volunteers see any assignments they are already scheduled for on the calendar. A

*Help Wanted*

icon will appear on dates where there is a need for volunteers and the volunteer matches the requirements set on the [Rules tab \[pg:0781\]](#) of the assignment.

<a href="#">Prev month</a>		<a href="#">Next month</a>		<b>October 2016</b>		
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
						1
2	3	4 	5	6	7	8
9	10	11	12	13 	14	15
16	17	18	19	20	21	22 
23	24	25  2:30 p - 5:00 p Flyer Distribution	26	27	28	29
30 	31					

Clicking on a date where there is a

*Help Wanted*

icon brings up the daily view of the schedule where volunteers can schedule themselves. You can setup an alert to go to the [In Box \[pg:0303\]](#) tab of your Volgistics mailbox, and/or to a [Coordinator's \[pg:0163\]](#) email address, to let you know the volunteer added herself to the schedule. This is done on an assignment-by-assignment basis on the [Rules tab \[pg:0781\]](#) of the assignment record.

Depending on your account's settings, the volunteers can also remove themselves from the schedule, see how many volunteers are still needed to fill the opening, see [other volunteers who are scheduled \[pg:1453\]](#), and/or click the *Description* link to view details for the assignment such as a job description, address, and phone number.

Schedule for

**Tuesday, October 25, 2016**

You are scheduled

2:30 p to 5:00 p

Flyer Distribution [Description](#)

Can't serve on this date? Click the **Remove me** button to remove yourself from these times

**Remove me**

## Schedule

Flyer Distribution [Description](#)

2:30 p to 5:00 p Open

1 volunteer still needed



Would you like to serve on this date? Click the **Schedule me** button to schedule yourself here

2:30 p to 5:00 p Raven, Elsa

**Schedule me**

Master of Ceremonies [Description](#)

2:30 p to 4:30 p Strickland, Gerald

Ticket Booth [Description](#)

2:30 p to 4:30 p Open

1 volunteer still needed



Would you like to serve on this date? Click the **Schedule me** button to schedule yourself here

2:30 p to 4:30 p Parker Jr., Danny

**Schedule me**

## Calendar view

In VicNet, group leaders for [group records \[pg:1909\]](#) will see an additional option to select how many group members will be serving after they click the button to schedule. You can find more information on this in [help topic 1198 \[pg:1673\]](#). *This option is not available in VicTouch.*

If there are many opportunities for the volunteer to self-schedule, a volunteer may see *Help Wanted* icons on almost every calendar date. In this case, VicNet offers a way to filter the calendar to show the icons on dates where there are openings in a particular assignment. To do this, the volunteer selects the name of the assignment they wish to see openings in from the *Sign-Up!* dropdown. *This option is not available in VicTouch.*

The screenshot shows a blue box with a 'HELP WANTED' icon and the text 'Sign-Up! We need volunteers on days that have the 'Help wanted' symbol. Click any of these days to learn more or to sign-up.' Below this is a dropdown menu labeled 'Show openings in' with the following options: 'All my assignments', 'All my assignments', 'Flyer Distribution', 'Master of Ceremonies', 'Ticket Booth', and 'Workshops'. The 'Flyer Distribution' option is highlighted. At the bottom of the box are 'Prev month' and 'Next month' buttons. Below the box is a calendar header with days of the week: Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday.

The Appearance in VicNet section of this help topic has information on how to customize the text for the *Sign-Up!* box.

### Please note:

The assignments that appear in the dropdown list are all of the assignments where the volunteer meets the criteria for self-scheduling set on the [Rules tab \[pg:0781\]](#) of the assignment. This may, or may not, match the assignments where the volunteer has a [Role \[pg:0103\]](#) listed on the Service tab of her record.

## The

### ***Help Wanted***

#### **Icons Do Not Appear on the Calendar**

The Volgistics Support Team often answers [help inquires \[pg:0184\]](#) about why volunteers are not seeing the Help Wanted icons on the calendar. Here are four common reasons a volunteer will not see the icons:

1. There are not any opportunities to serve created in your account. If the [Rules tab \[pg:0781\]](#) of the assignment is configured for *Openings only*, there must be unfilled [openings \[pg:0776\]](#) on the assignment's schedule. If the Rules tab is configured for

*Any times on these days*

, there must be days of the week checked.

2. The volunteer must meet *all* of the requirements set on the [Rules tab \[pg:0781\]](#) of the assignment. For example, if the Rules tab is set to require the volunteer to have an Active [Status \[pg:1832\]](#), a [Role \[pg:0103\]](#) of Assigned or Substitute, and a [CPR Certified Flag \[pg:0212\]](#), only volunteers who meet *all three* requirements will see the Help Wanted icons.

3. The opportunities to serve are outside of the date range settings on the

*VIC Self Scheduling*

setup page. For example, let's say you allow volunteers to schedule themselves one month in advance. If a volunteer views the schedule on June 3rd, openings on July 18th will not show because they are more than one month away.

4. If your organization uses [Site Level Access \[pg:0092\]](#), volunteers must have the Site the assignment appears under listed on the [Core tab \[pg:1868\]](#) of their record in order to see the Help Wanted icons for the assignment. You can learn how to add Sites to the Core tab of a volunteer record in [help topic 2037 \[pg:0094\]](#).

Information about each setup option for the calendar format appears below:

#### Limit volunteers to scheduling themselves for no more than (X) shift(s) per day

It's sometimes desirable for an organization to limit the number of shifts volunteers are allowed to commit themselves to on a single day. This helps prevent well-meaning individuals from over committing, and to spread volunteer involvement over a broader group of people.

Check this option if you want to impose such a limitation, and then choose the maximum number of schedule shifts a volunteer should be allowed to commit herself to on a single day. Un-check this option if you do not want volunteers to have a limit to the number of shifts they can schedule themselves for on a single day.

For example, if you check this option and enter 2 shifts, a volunteer who has already scheduled herself for two shifts on a given date (such as June 3rd) will not be able to schedule themselves for any additional shifts *on that date*.

Checking this option does not limit the number of times a Volgistics [System Operator \[pg:0065\]](#) or a [Coordinator \[pg:0163\]](#) can schedule a volunteer on a single day (it only limits only what volunteers can schedule *themselves* for through the Volunteer Information Center).

Limit the number of shifts a volunteer may schedule themselves for through self-scheduling to a total of (X) shift(s)

This option gives you a way to limit the total number of shifts volunteers can schedule themselves for through self-scheduling. It differs from the previous option in that it limits the total number of schedule shifts volunteers may schedule themselves for overall, rather than on a specific date.

Check this option if you want to impose such a limitation, and then select the maximum number of shifts a volunteer should be allowed to sign-up for overall. Do not check this option if you do not want volunteers to have any limit to the number of shifts they can schedule themselves for.

For example, check this option and then choose "6" if you want to limit the total number of shifts a volunteer can schedule themselves for to six.

Checking this option does not limit the number of times a Volgistics [System Operator \[pg:0065\]](#) or a [Coordinator \[pg:0163\]](#) can schedule a volunteer from within the Volgistics system.

Reset this limit... If you choose to limit the number of shifts volunteers are allowed to schedule themselves for overall, you can use the *Reset this limit* setting to control when (if ever) this limit is reset. This option gives you control over the rate at which volunteers can self-schedule. There is not a way to reset the counter for just one volunteer, or a select group of volunteers. The options you select will impact all of your volunteer records.

Choose Daily if you would like the limit reset once per day. Volgistics automatically resets the limit for all volunteers during the overnight maintenance cycle. This takes place at approximately 3:00 am Eastern time.

Choose Monthly if you want the limit reset on a monthly basis. Volgistics automatically resets the limit for all volunteers on the 1st of each month.

Choose Never if you never want the limit reset automatically.

Click the **Reset it now** button if you want to manually reset the limit for all volunteers right now.

See [help topic 2171 \[pg:0780\]](#) for examples of how organizations might best tailor these controls.

How far in advance should volunteers be allowed to schedule themselves?

You can control how far in advance you would like volunteers to be able to schedule themselves with this option. Volunteers cannot schedule themselves for past dates.

Allow volunteers to schedule themselves for shifts up to (X) months in advance. If you want to limit how far in advance volunteers can self-schedule, and have the setting update dynamically, choose this option and select a number from 1 to 12 from the dropdown list. This selection is best for organizations that have ongoing schedule requirements because the calendar will update automatically.

Allow volunteers to schedule themselves for shifts between these dates only. Enter a beginning and ending date if you want to limit volunteers so they can only schedule themselves during a specific time frame. This selection works well for organizations who have special events where the schedule requirements are only in a fixed range of dates.

## Allow volunteer to self-schedule on holidays in assignments that permit self-scheduling for "any times?"

Volgistics allows you to list [holidays \[pg:1391\]](#) where your organization will not need any volunteers, or will operate with a skeleton crew. When a date is setup as a holiday, regularly scheduled volunteers are removed from that date and volunteers do not see an option to sign-up for [openings \[pg:0776\]](#) on that date unless you create a "one time" opening. If your assignment's [Rules tab \[pg:0781\]](#) is setup to allow volunteers to schedule for "any times," use the options below to control self-scheduling on holidays.

**Yes.** Choose Yes if you want volunteers to be able to self-schedule on holidays for assignments setup for "any times."

**No.** Choose No if you do not want volunteers to be able to self-schedule on holidays for assignments setup for "any times."




## Show the number of volunteers still needed for each opening

When this option is checked, the daily view of the schedule will display the number of volunteers who are still needed to fill all of the [opening \[pg:0776\]](#) slots created by the number entered in the *Volunteers needed* field of the opening.

If you allow volunteers to self-schedule, they will always see where there are any unfilled openings that exist in the assignments they are allowed to self-schedule for. However, they will not see how many openings there are for the same assignment, date, and times unless you check this checkbox.

For example, if there are currently 8 unfilled schedule opening slots for the same date and times in an assignment called *Event Tear Down*, volunteers who view the daily view of the schedule for that date will see this:

---

Event Tear Down [Description](#)  
5:00 p to 6:30 p Open  
8 volunteers still needed   
 Would you like to serve on this date? Click the **Schedule me** button to   
schedule yourself here  
5:00 p to 6:30 p Parker Jr., Danny  
5:00 p to 6:30 p Strickland, Gerald

---

The number of volunteers still needed does not appear if this option is not selected.

## Confirmation Page

When you offer schedules using a calendar format, once a volunteer schedules herself for duty, Volgistics shows her a confirmation page with the date, assignment, and times she has selected.

You can optionally include additional information about the assignment she selected on this page. This can help to ensure that the volunteer understands the nature of the assignment.

Check the fields of information from the assignment record that you want to appear on the confirmation page. For example, if you would like the confirmation page to include the *Minimum age* and *Duties* for the assignment the volunteer scheduled herself for, check the box beside those fields on this list.

**Hint:** If you include phone number fields for the assignment or [Coordinator \[pg:0163\]](#) information, the *OK to call* checkbox by the phone number on the assignment or Coordinator's record must be checked in order for the phone number to appear.

## **Allow volunteers to remove themselves from the schedule**

Check this box if you'd like to allow volunteers to take themselves off from the schedule. This is available for both the list and calendar format. When you enable this option, there will be a

### **Remove me**

button when the volunteer selects a date she is scheduled on from the calendar. You can setup an alert to go to the [In Box \[pg:0303\]](#) tab of your Volgistics mailbox, and/or to the [Coordinator's \[pg:0163\]](#) email address, to notify you that the volunteer removed herself from the schedule. The alerts are setup on an assignment-by-assignment basis on the [Rules tab \[pg:0781\]](#) of the assignment record.

### **Allow volunteers to remove themselves from the schedule up to (X) day(s) before the date scheduled**

This setting allows you to control when volunteers are allowed to take themselves off from the schedule. If this option is not checked, but you have allowed volunteers to take themselves off from the schedule, volunteers can remove themselves from any date--past, present and future.

If you enable this setting, enter the number of days before the shift that you want volunteers to be able to take themselves off from the schedule. For example, if you want volunteers to be able to remove themselves the same day they are scheduled, enter 0. To allow them to remove themselves from the schedule the day before, enter 1, for two days before enter 2, and so on. When the restricted date arrives, the **Remove me** button will no longer appear so the volunteer will need to contact you if she cannot make it for the shift.

**Please note:** The date settings for this are based strictly on the calendar date--not a 24-hour period. For example, if you allow volunteers to remove themselves one day before they are scheduled, a volunteer who is scheduled at 7:00 am on June 7th will be able to remove herself from the schedule up to 11:59 pm on June 6th.

## **Appearance in VicNet**

In [VicNet \[pg:1724\]](#), you can customize the headings and directions that your volunteers will see regarding self-scheduling. Because [VicTouch \[pg:1778\]](#) is a more structured environment, there is not a way to add custom information regarding self-scheduling in all of the same locations. The one exception is the Confirmation instructions field. This will appear after a volunteer indicates she would like to serve in an assignment in both VicNet and VicTouch.

To change the headings and instructions on the schedule pages for VicNet or VicTouch that are not related to self-scheduling, go to the [VIC My Schedule Tab \[pg:1453\]](#) setup page.

### **Sign-up box heading**

If you choose the calendar format, the My Schedule tab will have a box at the top of the calendar. Volunteers use this box to filter the calendar to only show Help Wanted icons for a specific assignment. The default text for this box is *Sign-Up!*. You can customize the heading for the box by replacing the default text with your own information. An example of where this field appears is shown by item 1 in the Sign-Up Box Example picture below.

The *Sign-up box heading* also appears in several other locations. In the calendar format, the heading appears at the top of the page volunteers see that asks them to confirm that they would like to schedule themselves for the assignment. An example of this location appears in item 3 in the Yes/No Page Example photo below.

Additionally, the heading is displayed at the top of the selection fields if you use the list format. An example of this location appears in item 5 in the List Format Example photo below.



## Large instruction

The *Large instruction* field allows you to customize the information that appears in the *Sign-up box* at the top of the calendar. The default directions are *We need volunteers on days that have the 'Help wanted' symbol. Click any of these days to learn more or to sign-up.* You can customize the directions by replacing the default text with your own information.

The *Large instruction* field's information is not shown anywhere if you use the list format. You can see an example of where the directions in the *Large instruction* field appear in item 2 in the Sign-Up Box Example picture below.

## Small instructions

With the calendar format, you can customize the directions that show on the page that asks volunteers to confirm that they'd like to schedule themselves for an assignment. The default directions are *Schedule yourself for volunteer duty.* You can replace the default text with your own if you'd like different directions to be shown.

You can see an example of where the directions appear for the calendar format in item 4 in the Yes/No Page Example photo below.

If you use the list format, the directions will show above the page where volunteers select which assignments they'd like to serve in. You can see an example of this in item 6 in the List Format Example picture below.

## Confirmation heading

Once a volunteer indicates that she would like to serve in an assignment, a page displays showing the assignment, date, and times the volunteer is scheduled for. The default heading for this page is *Thank you!* You may change the default by replacing the text with your own heading.

Customized confirmation page headings will only display with the calendar format. In VicTouch, the heading uses the default *Thank you!* and there is not a way to change this. You can see an example of where the heading will appear in item 7 in the Confirmation Page Example picture below.

## Confirmation instructions

If you'd like the volunteer to receive additional information after she confirms that she'd like to serve, enter it into this field. This field is blank by default. The confirmation instructions are displayed in both VicNet and VicTouch when the calendar format is used. You can see an example of where the instructions appear in item 8 in the Confirmation Page Example picture below.



## **Sign-Up Box Example**

## Volunteer information for Danny Parker Jr.

[Home](#) [Mail](#) [My Profile](#) [My Schedule](#) [My Service History](#) [Time Sheet](#) [Account](#)

### Instructions

Your regularly scheduled volunteer shifts appear on the calendar. Click the "Next month" or "Previous Month" buttons to view a different month. For a printable view of your schedule click the "Printable view" button.

**1 Sign-Up Box Heading Field**  
**2** Large instruction field. Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.  
Show openings in

[Prev month](#) [Next month](#) **October 2016**

## Yes/No Page Example

### Volunteer information for Danny Parker Jr.

[Home](#) [Mail](#) [My Profile](#) [My Schedule](#) [My Service History](#) [Time Sheet](#) [Account](#)

### 3 Sign-Up Box Heading Field

Small instructions field. Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occididunt non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

**4**

#### You are signing-up to serve:

Date: **Tuesday, October 25, 2016**  
Assignment: **Flyer Distribution [City of Hill Valley]Hill Valley Preservation Society Fundraiser]**  
From: **2:30 p**  
To: **5:00 p**

## List Format Example

### Volunteer information for Danny Parker Jr.

[Home](#) [Mail](#) [My Profile](#) [My Schedule](#) [My Service History](#) [Time Sheet](#) [Account](#)

### Instructions

Your regularly scheduled volunteer shifts appear on the calendar. Click the "Next month" or "Previous Month" buttons to view a different month. For a printable view of your schedule click the "Printable view" button.

**5**

### Sign-Up Box Heading Field

Small instructions field. Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occididunt non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

**6**

	Date	Assignment	From	To
<input type="checkbox"/> <a href="#">Check to sign-up</a>	October 25, 2016 (Tuesday)	Event Setup [Hill Valley Preservation Society Fundraiser]	12:00 p	1:30 p
<input type="checkbox"/> <a href="#">Check to sign-up</a>	October 25, 2016 (Tuesday)	Event Tear Down [Hill Valley Preservation Society Fundraiser]	5:00 p	6:30 p
<input type="checkbox"/> <a href="#">Check to sign-up</a>	October 25, 2016	Flyer Distribution [Hill Valley Preservation Society Fundraiser]	2:30 p	5:00 p

## Confirmation Page Example

### Volunteer information for **Danny Parker Jr.**

[Home](#) [Mail](#) [My Profile](#) [My Schedule](#) [My Service History](#) [Time Sheet](#) [Account](#)

#### Sign-Up Box Heading Field

Small instructions field. Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

7

#### Confirmation Heading Field

Confirmation instructions field. Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

8

#### You are signed-up to serve:

Date: Tuesday, October 25, 2016  
Assignment: Event Tear Down [City of Hill Valley/Hill Valley Preservation Society Fundraiser]  
From: 5:00 p  
To: 6:30 p

#### Related help

[Help Topic 1158 \[pg:1925\]](#) - How do volunteers get started with VicNet?

[Help Topic 1179 \[pg:1458\]](#) - Changing Volunteers' VIC Privacy Settings

[Help Topic 1180 \[pg:0746\]](#) - Scheduling Overview

[Help Topic 2020 \[pg:1704\]](#) - How do I make VicNet so volunteers can only self-schedule for assignments they have?

[Help Topic 2099 \[pg:0096\]](#) - Tracking Assignments

[Help Topic 2132 \[pg:0766\]](#) - How to Edit a Schedule Opening

[Help Topic 2158 \[pg:0776\]](#) - How do I add schedule openings?

[Help Topic 2172 \[pg:0781\]](#) - Schedule Rules

[Help Topic 2173 \[pg:0103\]](#) - Roles

[Help Topic 2215 \[pg:0106\]](#) - Add an Assignment

[Help Topic 3020 \[pg:1724\]](#) - VicNet

[Help Topic 3021 \[pg:1778\]](#) - VicTouch

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# VicTouch PIN Screen Setup Page

Help topic 1176

Added or revised 04-17-2008

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The PIN screen setup page allows you to customize the appearance of the first screen volunteers see when they begin the VicTouch check-in process. If you're not already on this setup page, you can get to it like this:

1. Choose Setup from the [menu \[pg:0215\]](#).
2. Select "VicTouch."
3. Select "Check-in Sequence."
4. Click on the PIN screen setup link.

Note that any setup changes made to VicTouch will not be applied until a new VicTouch session is started. If VicTouch is running while you make setup changes, you will need to [shut down \[pg:1762\]](#) and then re-start VicTouch to view your changes. If volunteers are signed in at VicTouch when you shut down the session, they will be able to sign-out as usual, and their hours will be recorded correctly when you re-start VicTouch.

## System name

The VicTouch system name is "Volunteer Information Center" by default, but you can change the text that appears at the top of the PIN screen by entering a new system name in this field.

## Display logo graphic

If this checkbox is marked, the logo graphic you have uploaded on the [Vic graphics page \[pg:1451\]](#) will be displayed in the upper left corner on the initial VicTouch PIN screen.

If this checkbox is not marked, no logo graphic will be displayed on this screen.

## Greeting

Use the Greeting field to customize the message that will appear to the left of the PIN number keypad. Volgistics provides a default greeting, but you can change the message by entering your own text in this field.

## PIN keypad instructions

### Main instruction for this page:

Use this field to enter the instructional heading for this screen. For example, type "Enter your volunteer PIN number" in this field.

### Additional instructions:

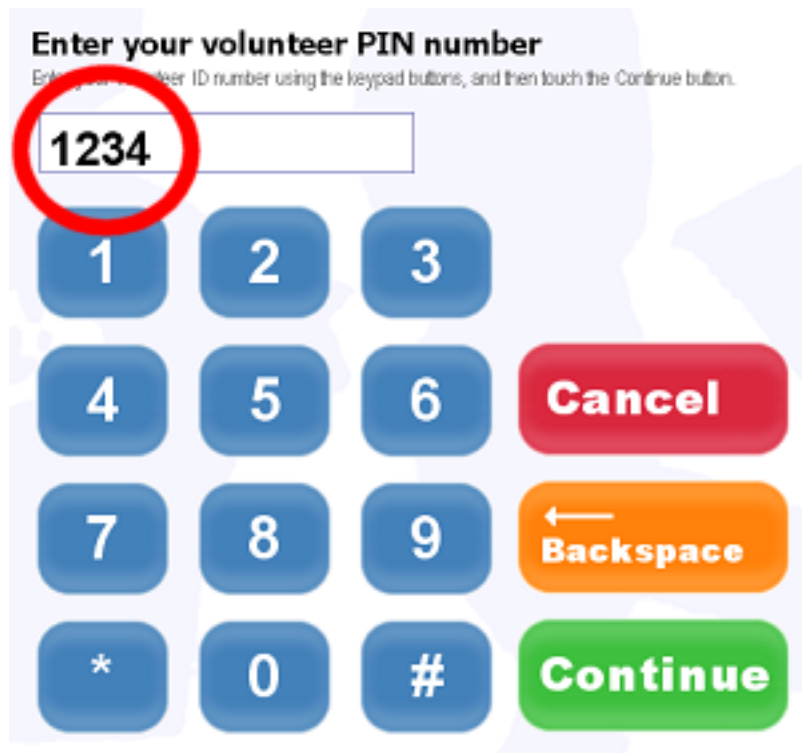
Use this field to provide any further instructions to volunteers.

## Pin Display

Select one of the following options to choose how the PIN will appear when volunteers select their number on the keypad.

Show the actual numbers as they are entered (less secure)

Choose this option if you want the numbers the volunteer is selecting on the keypad to appear as numbers on the VicTouch screen. This option can be helpful if volunteers are having trouble signing in, as it allows them to confirm the numbers they are actually entering when attempting to check-in.



Show an asterisk for each number entered (more secure)

Choose this option if you want the volunteer to see asterisks on the VicTouch screen as they select the digits in their PIN number on the keypad. This is more secure, as other individuals will not see the volunteer's actual PIN number if they view the number field on this screen.

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## Menu Screen Setup Page

Help topic 1211

Added or revised 01-09-2014

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The menu screen setup page allows you to customize the appearance of the page volunteers see when they check-in and out at the [VicTouch \[pg:1778\]](#) station. This is the part of the check-in process where volunteers choose what action they'd like to take. If you're not already on this page, you can get to it by:

1. Select [Setup \[pg:0887\]](#) from the [menu \[pg:0215\]](#).
2. Expand the VicTouch link.

3. Select *Check-in sequence*.

4. Select *Menu screen setup*.

Note that any setup changes made to VicTouch will not be applied until a new VicTouch session is started. If VicTouch is running while you make setup changes, you will need to [shut down \[pg:1762\]](#) and then re-start VicTouch to view your changes. If volunteers are signed in at VicTouch when you shut down the session, they will be able to sign-out as usual, and their hours will be recorded correctly when you re-start VicTouch.

Volunteers will see a **Sign-in** or **Sign-out** button on this page depending on if they have already signed-in for service. They may also see **Switch assignments**, **View my schedule** and/or **View my service** buttons depending on if these options are setup in your account.

#### Switch assignments button

The *Include a "Switch Assignments" button* section below explains how to enable this button.

#### View my schedule button

To enable the **View my schedule** button, please:

1. Select [Setup \[pg:0887\]](#) from the [menu \[pg:0215\]](#).
2. Expand the VicTouch link.
3. Select *Schedule screen*.
4. Check the box for *Use this tab at VicTouch* under the *Volunteers can* heading.
5. Click the **Save** button.

You might also find help topics [1171 \[pg:1453\]](#) and [2170 \[pg:1494\]](#) useful.

#### View my service button

To enable the **View my service** button, please:

1. Select [Setup \[pg:0887\]](#) from the [menu \[pg:0215\]](#).
2. Expand the VicTouch link.
3. Select *Service history screen*.
4. Check the box for *View their service history at VicTouch* under the *Volunteers can* heading.
5. Click the **Save** button.

You might also find [help topic 1207 \[pg:1465\]](#) useful.

An **Exit** button will also always appear in case volunteers have just entered their PIN to view their service or schedule. In this case, they should click this button to exit the module without signing-in or out.

The following sections explain more about the setup options available on this page:

### Include a "Switch Assignments" button

If you want volunteers to be able to choose a different [assignment \[pg:0096\]](#) instead of just signing-out, check this box. Volunteers who are already signed-in will then see a

#### Switch assignments

button in addition to the

#### Sign-out

button. They can press this button to select a different assignment instead of just signing-out. You control which assignments volunteers can select on the [Assignment Selection Screen Setup \[pg:1515\]](#) page.

### Allow groups to enter the number of volunteers serving

If you want [group \[pg:1909\]](#) records to be able to enter the number of volunteers who have come to serve when signing-in or out, check this box. You can learn more about how this option will work in [help topic 1212 \[pg:1759\]](#). When this box is *not* checked, the default value of the Volunteers field will be used when a group record signs-in to VicTouch. If no default value is setup for the Volunteers field, the default is one (1).

To setup a default value for the Volunteers field:

1. Select [Setup \[pg:0887\]](#) from the [menu \[pg:0215\]](#).
2. Expand the *Field options* link.
3. Select *Service tab*.
4. Select Volunteers.
5. Enter a number in the *Default entry* field.
6. Click the **Save** button.

#### Main instruction for this page

Enter or [paste \[pg:0063\]](#) the heading you would like for this page.

#### Additional instructions

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## Enabling Message Delivery at VicTouch

Help topic 2126

Added or revised 10-19-2007

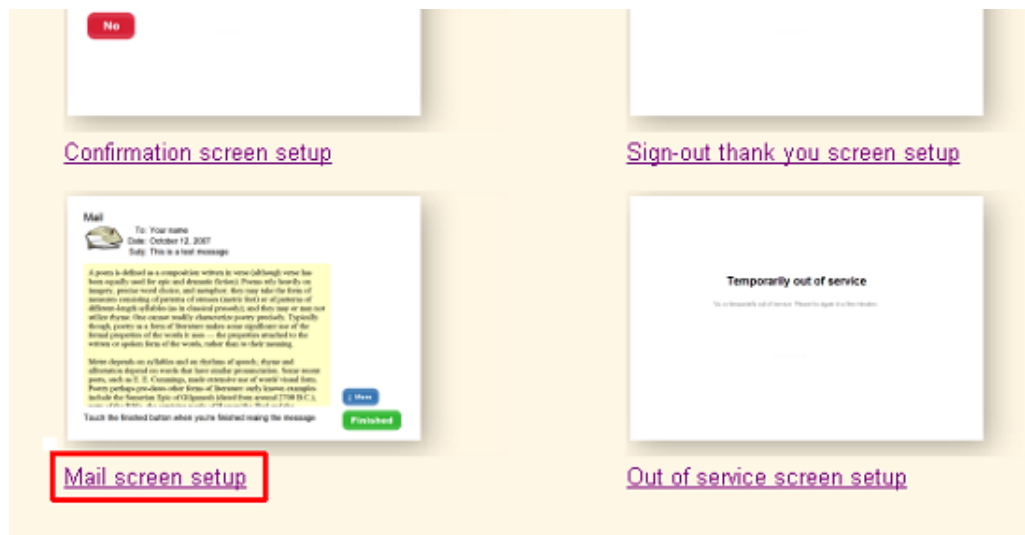
---

When you send Vic Mail messages, volunteers receive your messages at [VicNet \[pg:1724\]](#), [VicTouch \[pg:1778\]](#), or through both modules. This help topic explains how to setup VicTouch so volunteers will see new Vic Mail messages when they check-in or out at VicTouch.

To enable the delivery of Vic Mail at the VicTouch station you may need to turn on this option in [Setup \[pg:0887\]](#) and then restart VicTouch.

To turn-on Vic Mail delivery at VicTouch:

1. Choose Setup from the [menu \[pg:0215\]](#).
2. Select VicTouch.
3. Select 'Check-in sequence.'



4. Click the image labeled 'Mail screen setup' (shown above). This opens the 'VicTouch Check-in Setup' page for the mail screen.

5. Under Options, un-check 'Do not show volunteers their messages at VicTouch' (if it is currently checked).

6. Click the **Save** button.

It may be necessary for you to [stop \[pg:1762\]](#) and then re-start each of your VicTouch stations for this change to take effect at that station. To restart VicTouch at the VicTouch station simply double click the VicTouch shortcut you created when you [setup VicTouch \[pg:1527\]](#).

### Related help

[Help topic 2283 \[pg:1762\]](#) - Shutting down VicTouch

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## VicTouch Ground Rules

Help topic 2214

Added or revised 09-30-2016

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You use the [VicTouch \[pg:1778\]](#) Ground Rules page to setup the basic operating rules for the touch-screen kiosk Volunteer Information Center (VicTouch for short). If you're not already on the VicTouch Ground Rules page you can get there by selecting Setup from [menu \[pg:0215\]](#), selecting "VicTouch," and then clicking the "Ground Rules" link.



Note that any setup changes made to VicTouch will not be applied until a new VicTouch session is started. If VicTouch is running while you make setup changes, you will need to [shut down \[pg:1762\]](#) and then re-start VicTouch to view your changes. If volunteers are signed in at VicTouch when you shut down the session, they will be able to sign-out as usual, and their hours will be recorded correctly when you re-start VicTouch.

## Who can use VicTouch?

You can prevent volunteers with a certain Status – such as Inactive – from being able to use VicTouch. Check the volunteer Status (or Statuses) volunteers must have in order to use VicTouch. If a volunteer has a Status that is not checked here, they will be unable to check-in at VicTouch.

## Rounding

One of the functions of VicTouch is collect volunteer time. It does this in a time-clock manner: Volunteers sign-in when they arrive, and sign-out when they depart. Once a volunteer signs-out, VicTouch makes a service entry for them that shows the amount of time they served.

You can setup VicTouch so these service entries show exact number of hours and minutes a volunteer served; or you can have these service entries rounded to 5, 10, or 15 minute intervals.

Choose "Without rounding" if you always want the exact number of hours and minutes a volunteer served recorded. For example, if four hours and eleven minutes passed between the time a volunteer signed-in, and the time they signed out, their service record will show four hours, eleven minutes. This setting yields the most accurate service statistics.

Choose "Rounded" if you want these service records rounded to 5, 10, or 15 minute intervals; and then choose the interval you prefer (5, 10, or 15 minutes).

If you choose 'Rounded to the **nearest**,' your service records will be rounded to the nearest 5, 10 or 15 minute interval. For example, if you want rounding to the nearest 15 minute intervals, four hours eleven minutes would be rounded up to four hours fifteen minutes, and four hours and two minutes would be rounded down to four hours exactly.

If you choose 'Rounded to the **next**,' your service records will always be rounded **up** to the nearest interval. For example, if you want rounding to the nearest 15 minute interval, four hours two minutes would round to four hour fifteen minutes.

For the most accurate service tracking, choose "Without rounding." Some people prefer to see rounded hour entries in their service records. If this is your preference, choose one of the rounding options.

## Appearance

The options in this section of the VicTouch Ground Rules setup page allow you to customize the appearance of the VicTouch screen text and background.

Title font name: Enter the name of the font you would like to use for the main title displayed on the VicTouch screen.

Title font color: Use this field to choose a custom font color for the title at the top of the page. Enter the font color in RGB color notation (see "A note about RGB color notation" below if you're not sure what this is).

Title font size: Select the font size for the title on the VicTouch screen by choosing the appropriate font size from the dropdown menu.

Instructions font name: Enter the name of the font you would like to use for any instructions text, located on the left side of the screen.

Instructions font color: Use this field to choose a custom font color for the instructions text. Enter the font color in RGB color notation (see "A note about RGB color notation" below for more information).

Instructions font size: Select the font size for the instructions on the VicTouch screen by choosing the appropriate font size from the dropdown menu.

Background: This selection lets you change the appearance of the background for the VicTouch screen. Use the radio buttons to select one of six solid color options, a custom color, or a background image.

Volgistics provides pre-set options for a solid white, solid light blue, solid light green, solid light yellow, solid light salmon or solid light tan background color. You can also select the custom color option and enter your own background color in RGB color notation (see "A note about RGB color notation" below for more information). If you choose a custom color, a light color is advised. A lighter background color will allow you to achieve the best contrast with the content on the screen.

If you do not want a solid color background, you can use an image as the background for VicTouch. Volgistics comes with a default background image. To use this image, simply mark the "Use this background image" radio button. If you would like to use your own image, such as your logo, as the background image, choose the "Use this background image" button, and click the "Change background image" link beneath the graphic.

Once you are on the VicTouch background image page:

1. Click the Browse button below the current image.
2. Use the "Choose file" window to locate the custom graphic file you want to load, then click the Open or Ok button.
3. Click the Install button. It may take a minute or two for your computer to upload the new file, so do not close your browser or go to another web page until you receive the upload confirmation.

If you choose to upload a custom background image, select a light image with a limited number of colors. You might choose to edit your image to fade or wash out some of the color before uploading it in Volgistics.

#### *A note about RGB color notation*

There are several fields on this page for setting background and font colors. Enter color information in these fields using standard 'hexadecimal' RGB color notation. This is the color notation used in HTML (Hypertext markup language) to specify color attributes for web page elements. Hexadecimal RGB color notation includes the '#' character followed by a six character RGB color value in hexadecimal notation (hex).

These are some examples of this notation:

#FFFFFF (white)  
#000000 (black)  
#FF0000 (red)  
#1D9945 (green)

## Startup

This section provides information you need to create desktop shortcuts for starting VicTouch at the computer(s) where you will run the VicTouch module.

[Help topic 2289 \[pg:1765\]](#) explains how to create these desktop shortcuts.

### Always require login credentials for VicTouch startup

When this checkbox is un-checked, desktop shortcuts to VicTouch that you configure with your *public account identifier* and your *VicTouch access code* will launch VicTouch without asking for Volgistics login credentials.

Check this checkbox only if you want the VicTouch module to always require account credentials each time it is started. When this checkbox is checked, VicTouch cannot be started (or re-started) at any computer except by a Volgistics system operator, even if the desktop shortcut to VicTouch is configured with your *public account identifier* and your *VicTouch access code*.

It's best to leave this un-checked if you find that it's necessary to re-start VicTouch periodically, or if you want computers that run VicTouch to launch the VicTouch module automatically anytime the computer is restarted.

### Public account identifier

Your *public account identifier* is used to identify your account in any desktop shortcuts you create for launching VicTouch. Your public account identifier is not changeable (it's how Volgistics identifies your account).

### VicTouch access code

Your *VicTouch access code* is also used in any desktop shortcuts you create for launching VicTouch.

You can optionally change your account's VicTouch access code here at any time. If you change your VicTouch access code, any desktop shortcuts created previously that contain your old VicTouch access code must be changed to include the new access code in order for them to launch VicTouch without the need for someone to enter your account credentials.

### Use this URL in your desktop shortcut to VicTouch

An example of the URL that should appear in the desktop shortcut(s) you create to launch VicTouch. [Help topic 2289 \[pg:1765\]](#) explains how to create desktop shortcuts for VicTouch using this URL.

## Exit code

By design, there is not an obvious way to [stop VicTouch from running \[pg:1762\]](#) at a VicTouch workstation. This is to prevent volunteers or others who are not authorized to do so, from stopping VicTouch.

To stop VicTouch, an operator must know the special numeric "exit code" you enter here. To stop VicTouch, touch the "#" key, followed by the Exit Code you specify here. For example, if you set your exit code to be '123' you would enter '#123' at VicTouch to shut-down VicTouch.

## If volunteers forget to sign-out

When you use VicTouch, Volunteers sign-in when they arrive, and sign-out when they depart. Once a volunteer signs-out, VicTouch makes a service entry for them that shows the amount of time they served.

On occasion, a volunteer may sign-in, but then forget to sign-out when they leave. Volgistics can detect when this happens, and sign the volunteer out automatically.

Use these settings to specify the maximum number of hours a volunteer should be allowed to be signed-in before VicTouch assumes they forgot to sign-out; and then enter the number of hours and minutes that should be given in this situation.

For example, if your longest possible volunteer shift is nine hours, then it's safe to assume that a volunteer who has been signed-in for more than ten hours has forgotten to sign out. In this case you would choose 10 hours as the longest amount of time a volunteer should be logged in.

When a volunteer has been logged-in longer than you allow, VicTouch will automatically sign-out the volunteer. Since the actual time the volunteer left is unknown, VicTouch will give the volunteer the pre-set number of hours you specify.

If you want the number of hours that a volunteer should be given if they forget to sign-in to depend on the Assignment they performed, click on the Assignment name and enter the number of hours and minutes they should receive if they forget to sign-out from *that* assignment.

Check "If volunteers forget to sign-out, post their service records for auditing" if you want the service entries VicTouch makes automatically for volunteers who have forgotten to sign-out to appear on your service [audit list \[pg:1408\]](#). This makes it easy for you to later adjust these service entries to reflect the actual number of hours served, if you choose to do that.

### **Advanced**

Volgistics allows VicTouch sessions to remain idle for up to 96 hours before they expire. However, some organization's networks require Internet connections to remain active or be terminated. This ends any VicTouch session active on the network. The keep-alive pulse keeps the session "active" when the kiosk is not in use by sending a signal to the computer running the VicTouch module. This allows the kiosk to remain connected to Volgistics for up to the full 96 hours.

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## **Assignment Selection Screen Setup**

Help topic 2224

Added or revised 10-04-2016

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When volunteers sign-in at VicTouch, you can optionally ask them to indicate which assignment they have come to perform. Use the options on this page to customize the way VicTouch displays the assignment buttons volunteers use to indicate their assignment. If you're not already on this setup page, you can get to it like this:

1. Choose Setup from the [menu \[pg:0215\]](#).
2. Select "VicTouch."
3. Select "Check-in Sequence."
4. Click on the Assignment selection screen setup link.

Note that any setup changes made to VicTouch will not be applied until a new VicTouch session is started. If VicTouch is running while you make setup changes, you will need to [shut down \[pg:1762\]](#) and then re-start VicTouch to view your changes. If volunteers are signed in at VicTouch when you shut down the session, they

will be able to sign-out as usual, and their hours will be recorded correctly when you re-start VicTouch.

### **We want volunteers to indicate their assignment when they sign-in**

Check this checkbox if you want volunteers to indicate their assignment when they use VicNet to sign-in and out. If your organization wants to track volunteer service according to the assignment volunteers serve in, you should check this box.

#### When this box is checked

Volunteers will see this screen during the sign-in sequence, and asked to indicate which assignment they have come to perform. The service records created by VicTouch will include the assignment service was performed in, and you will be able to produce service reports that show how much service volunteers performed in each assignment.

#### When this checkbox is not checked

VicTouch will not ask volunteers to indicate their assignment (this screen will not appear as part of the check-in sequence if this is not checked). VicTouch will record volunteer service, however the service records created through VicTouch will not include the assignment service was performed in. You will not be able to produce service reports that show how much service volunteers performed in each assignment.

### **Main instruction for this page**

Enter the primary instruction that you want to appear at the top of this screen. Your entry may be up to 100 characters long. The default entry is "Which assignment are you here to perform?"

### **Additional instructions**

Additional instructions appear under the main instruction, usually in a smaller font. Enter any additional directions you want volunteers to see on this page. The default entry is "Touch the button for the assignment you have come to perform."

### **Display assignment buttons for...**

Use these setting to control which assignments volunteers will see buttons for when they reach this screen.

#### All active assignments

Choose 'All active assignments' if you want all of the volunteers who use VicTouch to be able to select from any of the *active* assignments in your database when they sign-in. Volunteers will see a button for all of the active assignments in your database when you choose this option. Select this option only if it's okay for any volunteer to record service in any assignment.

#### The volunteer's assignments, if their Role in the assignment is...

Choose this option if you want volunteers to see buttons only for the assignments they normally serve in. When you check this option, volunteers will see a button for each of the assignments listed in the Assignment box on the 'Service' tab in *their* record, if their **Role** [pg:0103] in the assignment is one of those selected.

Here's an example of how this works. In the following illustration, the "Assigned," "Substitute," and "Trainee" Roles are selected.

- The volunteer's assignments, if their Role in the assignment is...
  - Assigned
  - Former
  - Preference
  - Substitute
  - Trainee

Given these settings, any assignments that are listed in the Assignment box on the Service tab in a volunteer's record that have the Role "Assigned," "Substitute," or "Trainee" will appear as a button. Here's an example of the Service tab for the sample volunteer "Harry Bailey:"

## Bailey, Harry

Core

Profile

Service

Schedule

History

Contacts

Notes

Vic

Tagged

New
Previous
Next

### Assignments

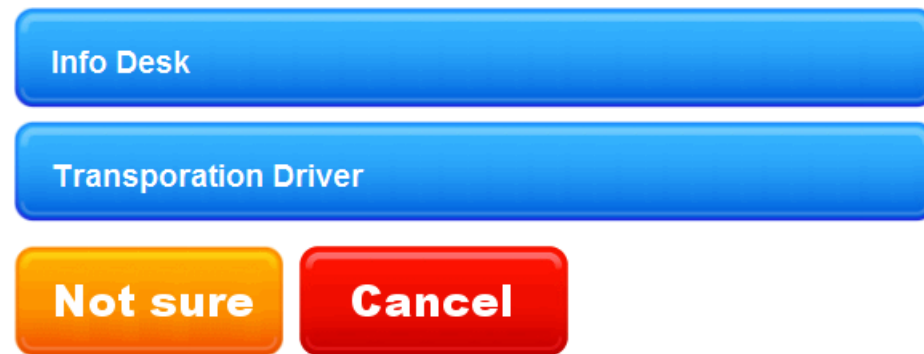
Assignment	Role	From	To		
Client Advocate [Sample Agency Name\Client Services]	Former	01-22-2001	12-31-2005	<a href="#">Edit</a>	<a href="#">Delete</a>
Info Desk [Site Two\Volunteer Services]	Assigned	09-24-1996		<a href="#">Edit</a>	<a href="#">Delete</a>
Transporation Driver [Sample Agency Name\Client Services]	Assigned	01-01-2001		<a href="#">Edit</a>	<a href="#">Delete</a>

Add

Given the settings in this example, this is what "Harry Bailey" would see at VicTouch...

## Which assignment are you here to perform?

Touch the button for the assignment you have come to perform today.



Harry sees buttons for "Info Desk" and "Transportation driver" because he has these assignments listed on the Service tab in his record, and his Role in these assignments is "Assigned," one of the Roles selected. Note that Harry does not see a button for the "Client Advocate" assignment, even though he has the "Client Advocate" button on his Service tab. The reason for this is that Harry's Role in the "Client Advocate" assignment is "Former," and Former assignments are not included in our example configuration.

### Display assignment buttons *with* Site and Place names

Choose this option if the Assignment buttons should include the name of the Site and Place that Assignment is associated with.

### Display assignment buttons *without* Site and Place names

Select this option if only the Assignment name should be displayed on the Assignment selection buttons.

### **Provide a 'Not sure' button for volunteers who do not know which assignment they have come to perform at the time they sign-in.**

Checking this box provides volunteers with a "Not sure" button they can touch if they are not sure which assignment they will perform, or if they do not see a button from their assignment. Do not check this box if you do not want volunteers to have a 'Not sure' button.

If you provide a 'Not sure' button, service entries created when the volunteer signs-in and out will not have an assignment in the assignment field. You can, however, audit these service entries (see the next option) to enter an assignment if you choose.

If there is a chance that volunteers might not know which assignment they have come to perform when they arrive, check this checkbox.

### If volunteers sign-in and out without selecting an assignment, place their service entries in the Mailbox for auditing

If you provide a 'Not sure' button, check this box if you want to audit the service entries created when volunteers choose 'Not sure.' This means that the service entries for volunteers who choose 'Not sure' for their assignment will appear on the 'Service' tab in your Volgistics mailbox for you to review. You could optionally edit these service entries to add the appropriate assignment as you audit them.

Do not check this box if you don't need to audit the service entries for volunteers who choose 'Not sure.'

**Buttons for assignments with "Sign-in option" checked are always displayed.**

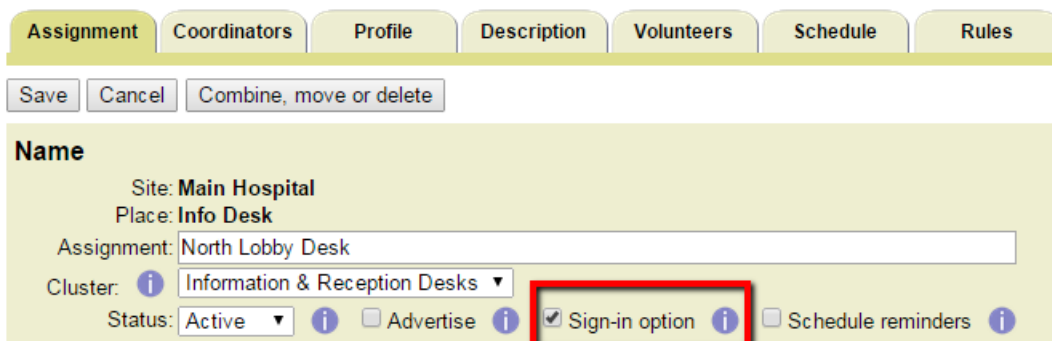
You can optionally make assignment buttons appear for selected assignments, that all volunteers will see when they sign-in; even if these assignments do not appear on their Service tab.

Here are some examples of situations in which you might want an assignment button to appear for all volunteers:

- If you create a generic assignment called "Training" that you use to schedule training or track volunteer training time, you can force VicTouch to always include a 'Training' assignment button on this screen. Volunteers who arrive for a training event could then select this assignment (their hours will be recorded under the 'training' assignment).
- If you have a special event or project for which many volunteers might serve, you can create a 'Special Event' assignment that will appear as a button for all volunteers, even though it's not anyone's regular assignment. Volunteers arriving to serve at the event can choose the 'Special Event' button when they sign-in (their hours will be recorded under the 'special event' assignment).

To make an assignment button appear on this screen for all volunteers:

1. Choose Assignments from the [menu \[pg:0215\]](#).
2. Select the Assignment.
3. On the Assignment tab, check the "Sign-in option" checkbox.



---

## How do I control which assignments a volunteer can choose when they s

Help topic 2226

Added or revised 04-17-2008

---

You control which assignments volunteers can choose from when they sign-in at VicTouch on the Assignment Selection Screen Setup page.

To get to this Setup page:

1. Choose Setup from the [menu \[pg:0215\]](#).



2. Select "VicTouch."
3. Select "Check-in Sequence."
4. Click on the "Assignment Selection Screen Setup" link.

## Related help

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# VIC Greeting Cards Setup

Help topic 2327

Added or revised 10-26-2007

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Use the VIC Greeting Card setup page to configure the automatic delivery of [greeting cards \[pg:1776\]](#) at [VicTouch \[pg:1778\]](#). If you're not already on the VIC Greeting Card setup page you can get there by choosing Setup from the [menu \[pg:0215\]](#), selecting 'VicTouch,' and then choosing 'Greeting cards.'

## Greeting card fonts

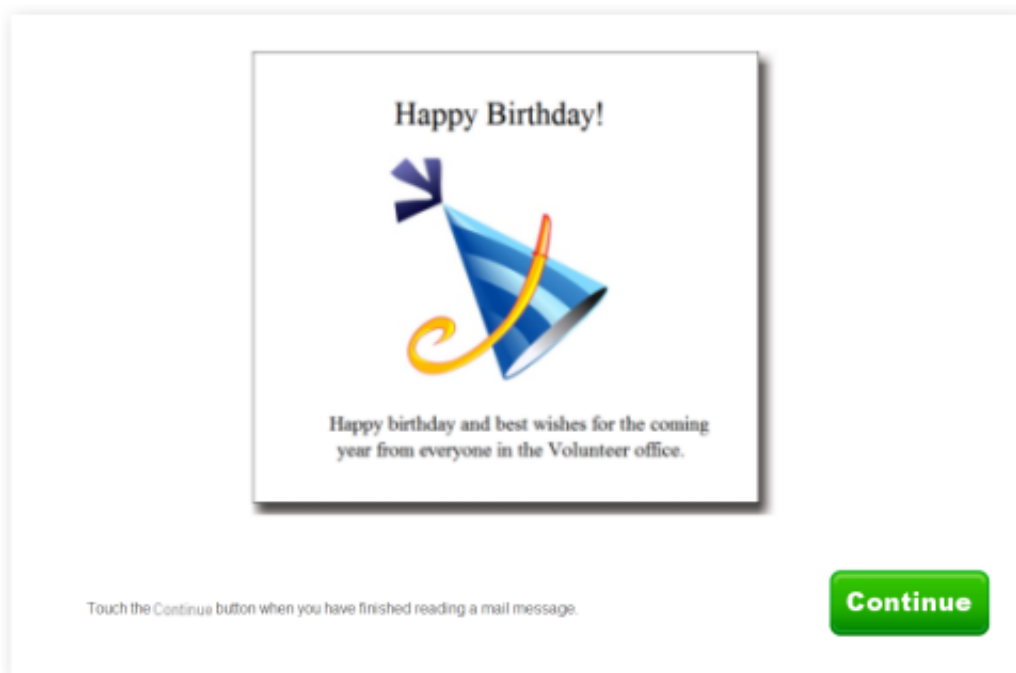
Use these settings to customize the font used on greeting cards.

Use this font for greeting cards:

Choose the font family you want for your greeting card font.

Heading font size:

Greeting cards can have a heading at the top, an image in the middle, and a message at the bottom, as shown in the example below. Use this control to choose the size of the font (in 'points') for the heading at the top of your cards.



### Message font size:

Use this control to choose the size of the font (in 'points') for the message at the bottom of your cards.

### **Birthday cards**

Use the controls in this section to setup automatic birthday card delivery.

#### Send birthday cards

Check 'Send birthday cards' if you want VicTouch to deliver birthday cards. If this is not checked, no birthday cards will be delivered at VicTouch.

#### Change graphic

Click the **Change graphic** button if you want to change the graphic image that appears on the birthday card to an image you provide. For best results, the custom image you provide should have a white (or transparent) background. Your custom birthday card image must meet these image type and size requirements:

File type: GIF, JPG, or PNG

Height: 600 pixels (maximum)

Width: 300 pixels (maximum)

File size: 48 Kb

#### Deliver birthday cards when a volunteer visits within \_\_\_ days of their birthday

Select this option if you want VicTouch to deliver a birthday card if a volunteer checks-in at VicTouch anytime within this number of days before or after their actual birthday. For example, if you choose this option and specify 5 days, a volunteer will receive a birthday card *the first time they check-in* starting 5 days before their birthday, until 5 days after their birthday. In this example, a volunteer would not receive a birthday card at VicTouch only if they never check-in during this 10 day time frame.

#### Only deliver birthday cards if a volunteer visits on their birthday

Select this option if you want VicTouch to deliver birthday cards only if a volunteer checks-in on their birthday. When you select this option, a volunteer would not receive a birthday card at VicTouch if they did not check-in on their birthday.

Volunteers receive birthday cards at VicTouch just once each year. Once a volunteer receives their birthday card for a given year, they would not receive another birthday card until the following year.

#### Heading for birthday cards

Enter the text you want to appear at the top of your birthday cards. Your entry may be up to 40 characters long. For example, 'Happy Birthday!'

#### Display this message on birthday cards:

Enter the message you want to appear at the bottom of your birthday cards. For example, 'Happy birthday and best wishes for the coming year from everyone in the Volunteer office.'

### **Start Date Anniversary Cards**

VicTouch can also deliver greeting cards on or around the anniversary of when a volunteer started their volunteer service in your organization. These cards are delivered automatically based on the **Start date** [pg:1890] that appears on the History tab in each volunteer's record.

Use the controls in this section to setup automatic Start date anniversary card delivery.

#### Send start date anniversary cards

Check 'Send start date anniversary cards' if you want VicTouch to deliver these anniversary cards. If this is not checked, no start date anniversary cards will be delivered at VicTouch.

#### Change graphic

Click the **Change graphic** button if you want to change the graphic image that appears on these cards to an image you provide. For best results, any custom image you provide should have a white (or transparent) background. Your custom image must meet these image type and size requirements:

File type: GIF, JPG, or PNG  
Height: 600 pixels (maximum)  
Width: 300 pixels (maximum)  
File size: 48 Kb

#### Deliver anniversary cards when a volunteer visits within \_\_\_ days of their "start date" anniversary

Select this option if you want VicTouch to deliver an anniversary card if a volunteer checks-in at VicTouch anytime within this number of days before or after their actual Start date. For example, if you choose this option and specify 5 days, a volunteer will receive an anniversary card *the first time they check-in* starting 5 days before their Start date anniversary, until 5 days after this anniversary. In this example, a volunteer would not receive an anniversary card at VicTouch only if they never check-in during this 10 day time frame.

#### Only deliver anniversary cards if a volunteer visits on their anniversary

Select this option if you want VicTouch to deliver these anniversary cards only if a volunteer checks-in on the anniversary of their Start date exactly. When you select this option, a volunteer would not receive an anniversary card at VicTouch if they did not check-in on their anniversary.

Volunteers receive Start date anniversary cards at VicTouch just once each year. Once a volunteer receives their anniversary card for a given year, they would not receive another anniversary card until the following year.

#### Heading for anniversary cards

Enter the text you want to appear at the top of your anniversary cards. Your entry may be up to 40 characters long. For example, 'Thank you!'

#### Display this greeting on anniversary cards:

Enter the message you want to appear at the bottom of your anniversary cards. For example, 'On the anniversary of your enrollment as a volunteer we would like to take this opportunity to thank you for your valuable service contribution.'

#### **Holiday card (1)**

## Holiday card (2)

In addition to birthday and anniversary cards, you can use VicTouch to deliver greeting cards for holidays or any other date you might want to present a card (for example, to thank volunteers for their help with a special event or project).

You can post up to two holiday cards at the same time, in case you have overlapping holidays.

Use the controls in this section to setup automatic holiday card delivery.

### Send this holiday card between (date) and (date)

If you want to deliver this holiday card at VicTouch, check this checkbox and enter the date range during which this holiday card is to be delivered. If you do not want this holiday card to be delivered, un-check this checkbox.

### Change graphic

Click the **Change graphic** button if you want to change the graphic image that appears on these cards to an image you provide. For best results, any custom image you provide should have a white (or transparent) background. Your custom image must meet these image type and size requirements:

File type: GIF, JPG, or PNG  
Height: 600 pixels (maximum)  
Width: 300 pixels (maximum)  
File size: 48 Kb

### Show this card every time a volunteer visits between the selected dates

Select this option if you want VicTouch to deliver this holiday card every time a volunteer checks-in or out at VicTouch during the date range you entered for the card.

### Once a volunteer receives this card, do not show it to that volunteer again this year

Select this option if you want VicTouch to deliver this holiday card to each volunteer only once, the first time they check-in during the date range you entered for the card.

### Heading for this holiday card

Enter the text you want to appear at the top of this holiday card. Your entry may be up to 40 characters long. For example, 'Season's Greetings!'

### Display this greeting on this holiday card

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## Setting-Up Internet Explorer for VicTouch

Help topic 8270

Added or revised 05-10-2016

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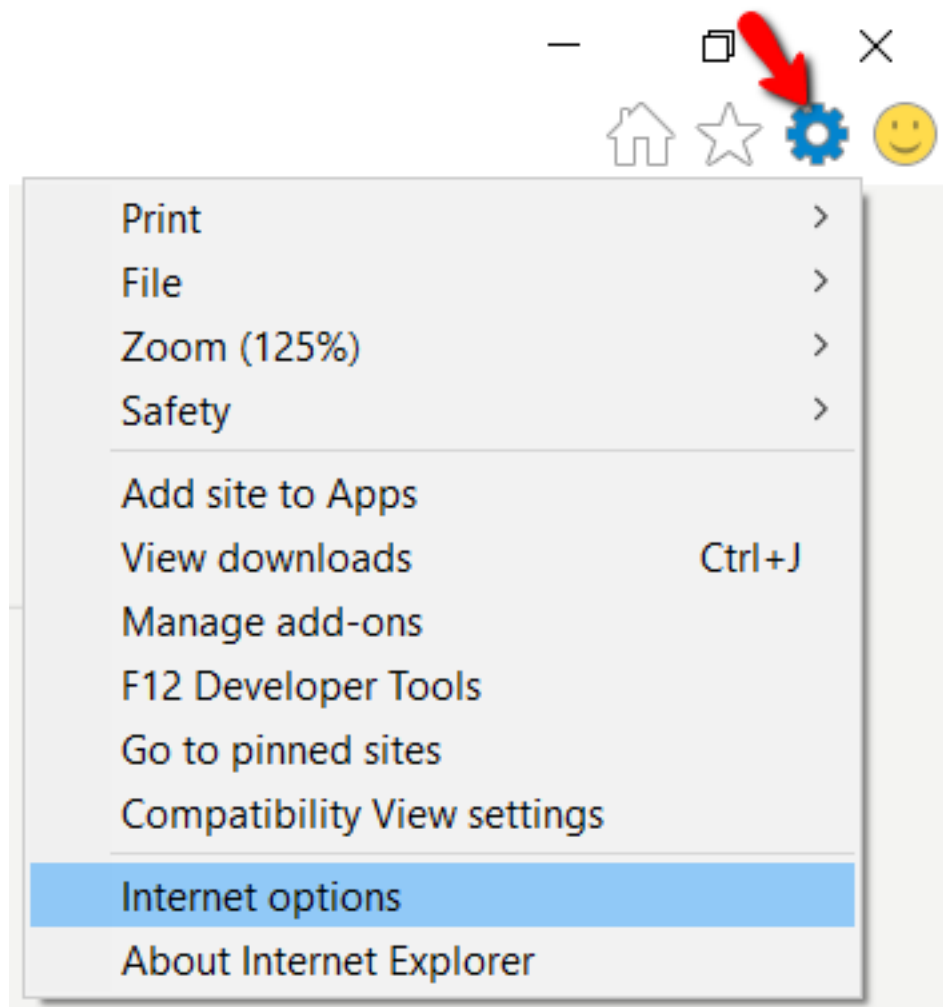
The **VicTouch** [pg:1778] module runs in a web browser at each VicTouch station you choose to install in your organization. Currently, VicTouch works with Internet Explorer Version 11 or Google Chrome. Internet Explorer is available free from Microsoft for Windows, and Chrome is available free from Google for Windows, Mac, or Linux.

To work properly in Internet Explorer, VicTouch requires certain Internet Explorer browser settings. These settings may not be required at the computers where you use Volgistics, however they are required at any computer where you will use VicTouch.

Complete each of the following sections at each computer where you will run the VicTouch module. If VicTouch is currently running in kiosk mode, you will need to shut it down by following the steps in [help topic 2283 \[pg:1762\]](#) before you proceed.

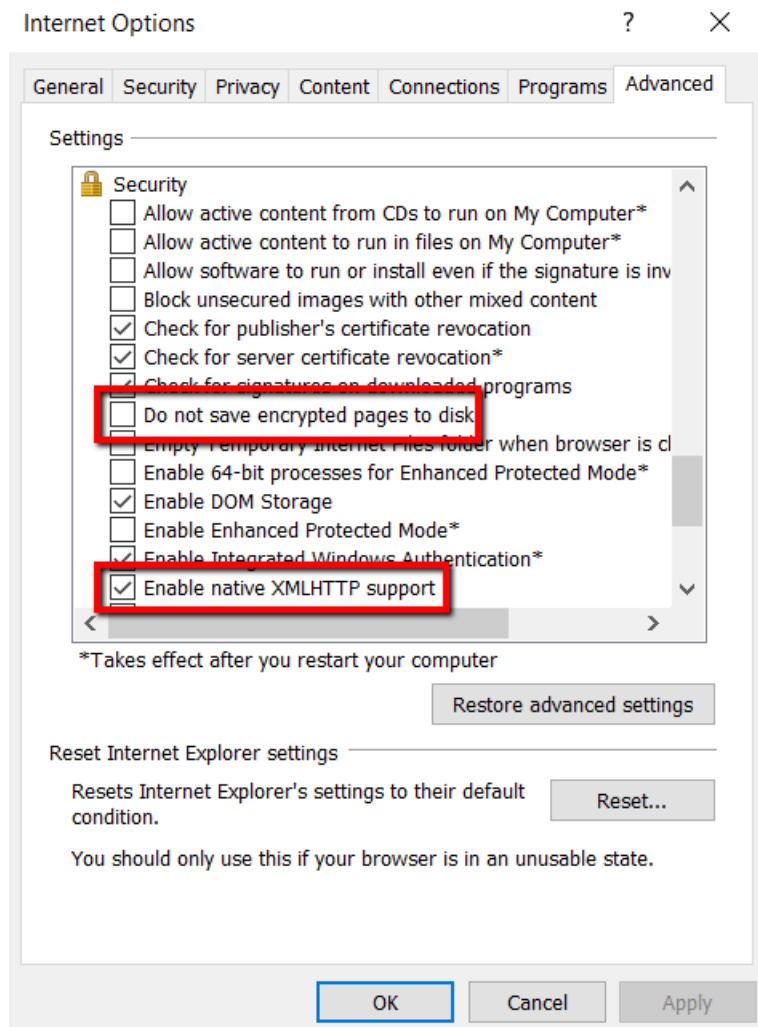
### Set Internet Explorer Advanced Options

1. Start Microsoft Internet Explorer at your VicTouch workstation. In Windows 10, select *All apps* from the Start menu and go to *Windows Accessories*.
2. Choose *Internet Options* from the Tools menu in Internet Explorer.



3. Select the Advanced tab.
4. Scroll to the Security heading and locate the *Do not save encrypted pages to disk* checkbox. If this checkbox is checked, un-check it as shown below (*Do not save encrypted pages to disk* should **not** be checked).

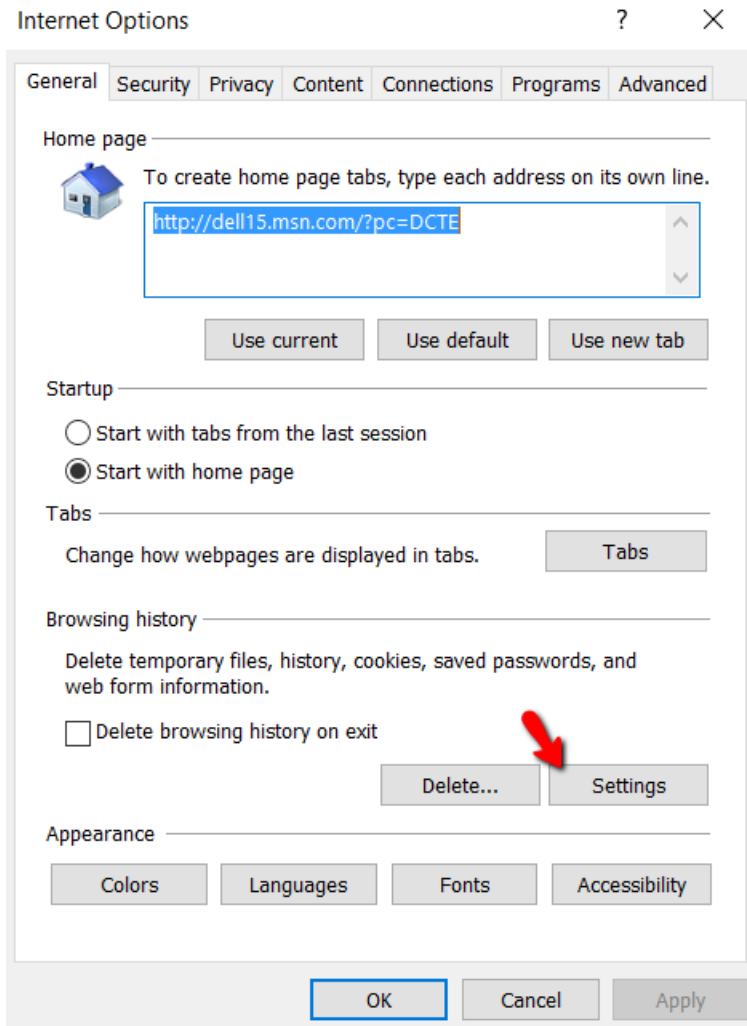
5. Also in the Security section, locate the *Enable native XMLHTTP support* checkbox. If this checkbox is **not** checked, check it as shown below (*Enable native XMLHTTP support must be checked*).



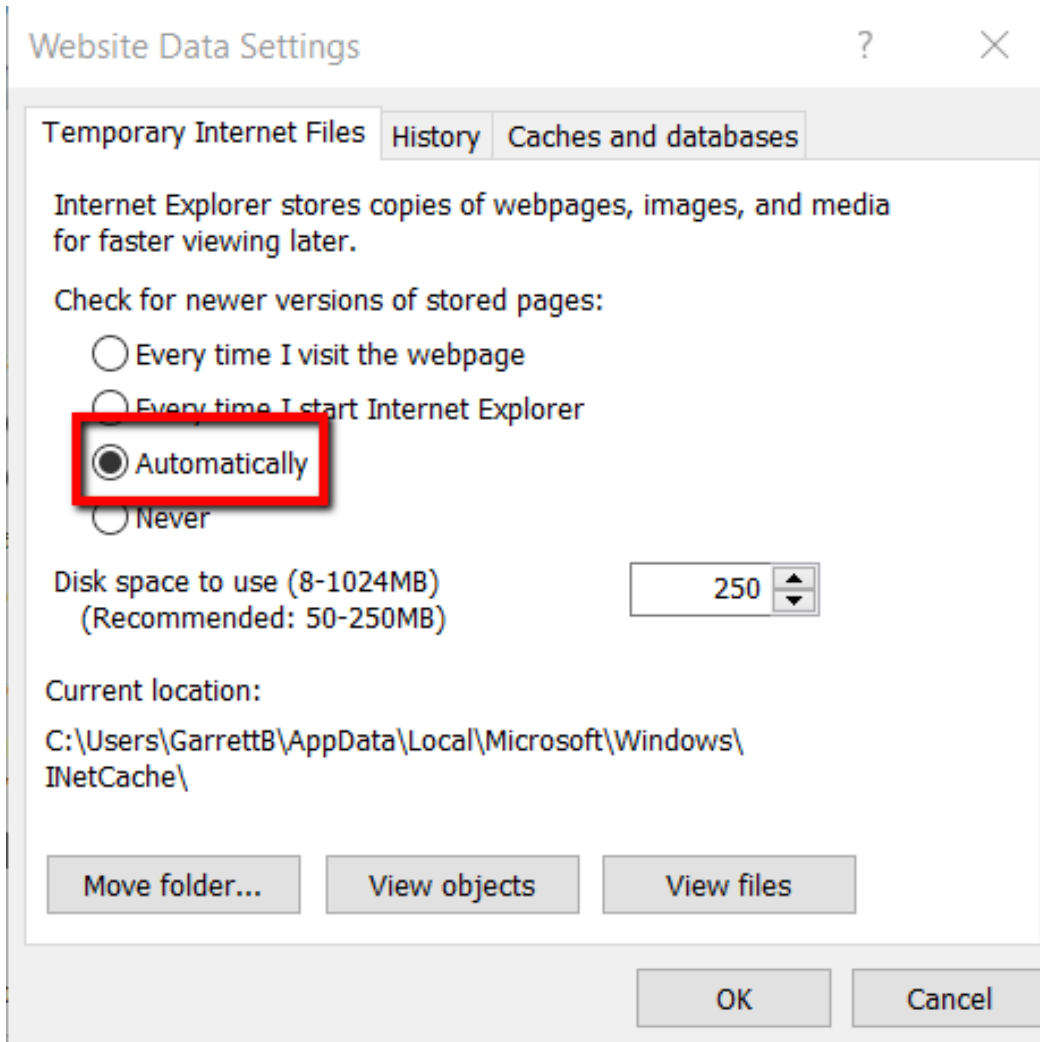
6. Click the **OK** button in the Internet Options dialog box.

### **Optimize Internet Explorer file caching**

1. Follow steps 1 & 2 in the *Set Internet Explorer Advanced Options* section above.
2. Select the General tab.
3. Click the **Settings** button in the *Browsing history* section.



4. On the *Temporary Internet Files* tab, be sure *Automatically* is selected under *Check for newer versions of stored pages*.



5. Click the **OK** button.

Now that Internet Explorer is setup properly, you can [create a desktop shortcut \[pg:1765\]](#) to launch VicTouch if one is not setup already.

#### Related help

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## Setup a VicTouch computer

Help topic 8271

Added or revised 05-16-2016

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To setup the VicTouch component:

#### Step 1

The VicTouch module works with Microsoft Internet Explorer or Google Chrome. Internet Explorer is available free from Microsoft, and is included automatically with any Windows installation. Chrome is available free from Google. If your VicTouch computer does not currently have Internet Explorer or Chrome installed, install Internet Explorer or Chrome before continuing. This limitation applies only to the VicTouch module. You can use Volgistics and VicNet from any popular web browser.



## Step 2

VicTouch has the best appearance when the screen resolution on the VicTouch computer is set to a value no smaller than 1024 by 768 pixels, and no larger than 1280 x 1024.

To check or set the screen resolution:

1. In Windows, click on the Start button, and select Settings.
2. Click System
3. On the left side, select "Display"
4. On the right side, scroll down and click "Advanced display settings"
5. Under "Resolution" select the resolution you would like to use and click **Apply**
6. Click **Keep changes**

## Step 3

If you will use a touch screen monitor at the VicTouch computer, install any touch screen drivers that accompanied your touch screen monitor, and perform any touch screen calibration recommended by the touch screen manufacturer before installing VicTouch. Refer to the documentation from your touch screen monitor manufacturer for instructions on installing touch screen drivers or calibration.

## Step 4

Check your Internet connection. From the VicTouch computer, be sure you have a working Internet connection by visiting the Volgistics web site at <https://www.volgistics.com>.

## Step 5

If you're using Internet Explorer, make the recommended [changes to its settings \[pg:1523\]](#). Then create a [shortcut to launch VicTouch in kiosk mode \[pg:1765\]](#). This can be done with either the Internet Explorer or Google Chrome web browsers.

Perform any additional security configuration of the VicTouch computer you prefer.

## Step 6

Start Microsoft Internet Explorer or Google Chrome in kiosk mode. If you configured kiosk mode as recommended, VicTouch will start in kiosk mode when you touch or click the shortcut you created. Or, if you choose to add the shortcut to your computer's Startup folder, when you restart the computer.

If you choose not to use kiosk mode to run VicTouch, visit <https://www.volgistics.com/touch> to load VicTouch. There are more instructions on this in [help topic 1203 \[pg:1933\]](#).

## Step 7

Follow the VicTouch Start-up instructions that appear on the screen to complete the setup process. Once you complete the Start-up instructions VicTouch is ready for volunteer interaction.

## To stop VicTouch

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## Tags

Help topic 2136

Added or revised 09-30-2016

---

Tags provide an easy way for you to temporarily mark selected volunteer records. Tags save you time by letting you perform certain tasks for all of the tagged volunteers at once. After you [tag \[pg:1538\]](#) one or more volunteers you can:

- View just the tagged volunteers
- Post hours for the tagged volunteers
- Send email to all of the tagged volunteers
- Send text messages to all of the tagged volunteers
- Print reports that include just the tagged volunteers
- Insert a Date record for all of the tagged volunteers
- Change the Status for all of the tagged volunteers
- Add or insert a Type or Flag into all of the tagged records
- Archive the tagged volunteer records
- Delete the tagged volunteer records

You can determine if a particular volunteer is tagged or not by looking at the *Tagged* checkbox in the volunteer's record. If the *Tagged* checkbox is checked, the record is tagged. If it is not checked, the record is not tagged. You can see the *Tagged* checkbox on the list of volunteers, as well as inside individual volunteer records.

On the volunteer list, the *Tagged* checkbox looks like this:


Name	Tag	Number	Status	Type	Last Activity	Start
<input type="text" value="Search"/>		<input type="text" value="Search"/>	<input type="text" value=""/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>
Armstrong, Mary	<input type="checkbox"/>	816	Inactive	Adult	06-11-2013	
Baccus, Lydia	<input type="checkbox"/>	774	Active	Adult	01-28-2016	08-08-2012
Bailey, Victor	<input type="checkbox"/>	1155	Applicant	Adult	06-11-2013	
Bargas, Jessica	<input checked="" type="checkbox"/>	830	Applicant	Adult	06-11-2013	
Barker, Geraldine	<input type="checkbox"/>	910	Active	Adult	01-27-2016	03-01-1993
Barnes, Merry	<input type="checkbox"/>	69	Active	Adult	01-27-2016	11-07-2012

Inside a volunteer's record the *Tagged* checkbox looks like this:


## Bargas, Jessica


Core Profile Service Schedule History Contacts Notes Vic Docs

Save Cancel Archive Delete Combine New Previous Next

Tagged  Copy

**Name**

Last name:  Number:  

First name:  Status:  

When you first login to Volgistics, none of your volunteer records are tagged.

You can tag a volunteer simply by checking the *Tagged* checkbox in their record (there are [other ways to tag \[pg:1538\]](#) volunteer records, too).

You can tag as many volunteers as you want to.

Once you tag a volunteer's record, it stays tagged until you un-tag it, exit from Volgistics, or your Volgistics [session ends \[pg:1589\]](#). (If you want tagged records to be available each time you login, see [How to permanently mark tagged records \[pg:1541\]](#)). You can un-tag all of the tagged records in a single step by:

1. From the [menu \[pg:0215\]](#), choose *Tags*.
2. Click the **Clear all tags** button.

Tags apply only to your Volgistics sessions. If you and someone else from your organization use Volgistics at the same time, your tags will not affect the other operator's, and their tags will not affect you. In other words, the records that you tag will only appear tagged at your computer.

### Related help

- [Help Topic 2139 \[pg:1538\]](#) - Tagging volunteer records
- [Help Topic 2137 \[pg:1999\]](#) - Working with tags
- [Help Topic 2140 \[pg:1541\]](#) - How to permanently mark tagged records

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## Working with Tags

Help topic 2137

Added or revised 04-19-2017

---

Once you've [tagged \[pg:1538\]](#) one or more volunteer records, there are a variety of useful things you can do for the entire group of tagged records. Please keep in mind that tags are cumulative for your session unless they are cleared. For example, if you tag 8 records and perform a task, and then tag 5 more records without clearing your tags, the next task you perform for tagged records will be made on 13 records. See the Clear Tags section of this help topic for information on how to clear tags between tasks.

Click on a link in the *Contents* box below to be taken directly to that section of this help topic.

### Contents

- View the tagged volunteers
- Print a report for the tagged volunteers
- Send email, VIC mail, or text messages to the tagged volunteers

- Change the Status for all of the tagged records
- Add a Type or Flag entry to the tagged records
- Delete the tagged records
- Archive the tagged records
- Send a VicNet password link to the tagged records
- Set temporary VicNet passwords for all tagged volunteers
- Send the text messaging opt-in email to the tagged records
- Add a Site to the tagged records
- Insert Date records for the tagged volunteers
- Add an Assignment to all of the tagged records
- Add a Mandate to all of the tagged records
- Send a schedule reminder to all of the tagged volunteers

### View the tagged volunteers

You can view a list of the volunteer records that are currently tagged (or un-tagged).

1. From the [menu \[pg:0215\]](#), choose Volunteers.
2. Under the Include section, click the Clear link to clear any previous include settings.
3. Under the Include section, select *Tagged* from the Tags field (or *Not tagged* to see the list of un-tagged volunteers).

## 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](#)

### Include

Status: i

Type: i

Flag: i

Site: i

Set: i

**Tags: i**

Kind: i

[↑ Clear](#)

4. Click the All link near the top of the Volunteers page. Volgistics displays a list of all the volunteers whose records are currently tagged (or un-tagged if you chose to include un-tagged volunteers).

# 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](#)



## Include

Status:

Type:

Flag:

Site:

Set:

Tags:

Kind:

[↑ Clear](#)

### Print a report for the tagged volunteers

Most reports provide a way for you to print the report for just the tagged records. For example, you can tag a group of volunteers and then print mailing labels for them. For more information on stock reports, please see [help topic 2104 \[pg:0595\]](#). For more information on custom reports, please see [help topic 2223 \[pg:0467\]](#).

1. From the [menu \[pg:0215\]](#), choose Print.
2. Choose the kind of report you would like to print, for example Address labels.
3. Click on the name of the report you want to print.
4. Click the **Print it** button.
5. On the Include page, check *Tagged volunteers* and uncheck *These volunteers*, as shown here:

Which **volunteers** do you want to include in this report?

Tagged volunteers ( 50)

These volunteers:

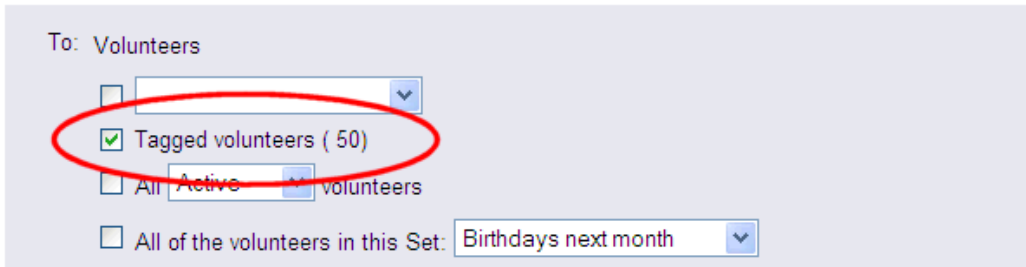
Not all reports are driven by volunteer records. Those that are not, do not offer the *Tagged volunteers* checkbox on the Include page.

6. Click the **Start printing** button.

### Send email, VIC mail, or text messages to the tagged volunteers

It's easy to send an [email \[pg:0404\]](#), [VIC mail \[pg:0315\]](#), or [text message \[pg:0343\]](#) to a group of tagged volunteers.

1. From the [menu \[pg:0215\]](#), choose Mailbox.
2. Select the [Out Box tab \[pg:0362\]](#), and then click the **Send a message** button.
3. In the *To* section, check *Tagged volunteers*.



4. Compose and then send your message.
- Change the Status for all of the tagged records**

To change the volunteer [Status \[pg:1832\]](#) for multiple volunteers at one time, take these steps:

1. From the [menu \[pg:0215\]](#), choose Tags.
2. Next to *Change the **Status** of all tagged volunteer records to*, select the Status you would like to switch your tagged volunteers to from the dropdown list.
3. Click the **Go** button.

**Add a Type or Flag entry to the tagged records**

There may be occasions when you want to add the same [Type or Flag \[pg:0212\]](#) entry to a lot of volunteer records. You can add these all at once using tags.

If the Type or Flag entry you want to make does not already appear as a Type or Flag option on the [Core tab \[pg:1868\]](#), you should start by creating it (you can skip this step if the Type or Flag entry you want to add already exists in your database):

1. From the [menu \[pg:0215\]](#), select Setup.
2. Click *Field options*, and then select *Core tab* (the Core tab is where the Flag and Type fields are found).
3. Select Types or Flags, as appropriate.
4. Enter the new Type or Flag in the *Add a new item* field, and then click the **Save** button.

Once the Type or Flag value you want to add exists in your database, it's easy to insert it into all of the tagged records:

1. From the [menu \[pg:0215\]](#), choose Tags.
2. If you want to add a Type entry to all of the tagged records, use the *Change the **Type** of all of the tagged volunteers to* field to choose the Type you want to add.

If you want to add a Flag entry to all of the tagged records, use the *Add this **Flag** to all of the tagged records* field to choose the Flag you want to add.

3. Click the **Go** button.

Volgistics inserts the Type or Flag entry into all of the tagged records.

### **Delete the tagged records**

You can delete multiple volunteer records at once by using the tags feature. Because deleting a record can have a permanent impact on your volunteer recordkeeping, *we recommend reading the [Important Considerations Before Deleting Records](#)* [pg: ] section of help topic 2309 before proceeding.

After you have tagged the volunteer records you want to delete, follow these steps to delete the records:

1. From the [menu](#) [pg:0215], choose Tags.
2. Click the **Go** button located next to *Delete the tagged volunteer records*.
3. Because deleting records permanently removes them from the account, a confirmation box will appear where you must verify that you want to delete the records.

If your account has the [VicDocs](#) [pg:1648] feature enabled, the confirmation box will also include an option to save or delete the documents associated with the records. If you select to save the documents, they will be available on the [In Box](#) [pg:0303] in your mailbox for 5 days. If you do not save the documents locally during these 5 days, there will not be a way to recover them.

### **Operator Rights and Deleting Tagged Records**

If you do not see the *Delete the tagged volunteer records* option on the Tags menu, your Volgistics [System Operator rights](#) [pg: ] do not permit you to delete volunteer records. Your System Operator rights are set by your organization's [Volgistics Administrator](#) [pg:0052].

### **Archive the tagged records**

Archiving volunteer records allows you to move records for volunteers who are not actively serving to a separate section of your database. If you are not familiar with how this affects volunteer records, we recommend reviewing help topic 1999 "[Archived Versus Non-archived Records](#)" [pg:0709] before proceeding.

If you want to [archive](#) [pg:1819] a group of volunteer records, you can tag those volunteers and then archive all of their records in one step:

1. From the [menu](#) [pg:0215], choose Tags.
2. Click the **Go** button located next to *Archive the tagged volunteer records*.

Volgistics will archive all of the tagged records.

### **Operator Rights and Archiving Tagged Records**

If you do not see the *Archive the tagged volunteer records* option on the Tags menu, your Volgistics [System Operator rights](#) [pg: ] do not permit you to archive volunteer records. Your System Operator rights are set by your organization's [Volgistics Administrator](#) [pg:0052].

## Send a VicNet password link to the tagged records

If you want to provide a number of volunteers with their VicNet password at once, using tags will allow you to do so more efficiently than sending password messages from each individual volunteer's Vic tab. Volunteers who have [opted-in to text messaging \[pg:0323\]](#) will receive the password by text and by email. Volunteers who have not opted-in to text messaging will only receive the password by email.

You can customize the content of the email message volunteers receive with the link. The

### *Send a Message with Login Information*

section of help topic 1158 has more information on how to do this. You can find this section of the help topic [here \[ \]](#).

To send all tagged volunteers a message containing a VicNet password link:

1. Choose Tags from the [menu \[pg:0215\]](#).
2. Click the **Go** button located next to *Send a VicNet password link to the tagged volunteers*.

### **Set temporary VicNet passwords for all tagged volunteers**

There may be times when you want to set a temporary password that volunteers use to login to VicNet for the first time. For example, if you have volunteer orientations where you will train groups of volunteers all at once, you can set the same temporary password for the entire group and tell them the temporary password. Or, you may give out packets to new volunteers where you have instructions on how to login, and you give the temporary password in the instructions. When volunteers login with the temporary password the first time, they will be prompted to select a permanent password.

To assign a temporary password to all tagged volunteers:

1. Choose Tags from the [menu \[pg:0215\]](#).
2. Enter the temporary password in the field located next to *Set temporary VicNet passwords for all tagged volunteers*. This password does not need to meet any [password strength rules \[pg:1447\]](#) you have set for volunteers because volunteers are required to set a permanent password the first time they login.
3. Click the **Go** button.

### **Send the text messaging opt-in email to the tagged records**

If you have [enabled text messaging \[pg:0321\]](#) for your account, you will see an option to send volunteers an email message asking them to opt-in to text messaging. To send this email message:

1. Choose Tags from the [menu \[pg:0215\]](#).
2. Click the **Go** button located next to *Send the text message opt-in email message to the tagged volunteer records*.

The system will send the default message from the [Messages Ground Rules \[pg:0929\]](#) page to all of the tagged records except for the ones where the volunteer has already opted-in to text messaging. You can find more information on how to edit the default message in the *Communicate that Text Messaging is Available* section of [help topic 1301 \[ \]](#).

### **Add a Site to the tagged records**



If you use [Site Level Access \[pg:0092\]](#), you can use tags to [add a Site \[pg:0094\]](#) to the Core tabs of a group of volunteers in a single step. To do this:

1. From the [menu \[pg:0215\]](#), choose Tags.
2. Select the name of the Site you would like to add from the dropdown list next to *Add this **Site** to the tagged volunteer records*.
3. Click the **Go** button.

#### **Insert Date records for the tagged volunteers**

There may be times when you want to add the same Date record for many volunteers. For example, you might want to enter the same Training Date record for all of the volunteers who attended a particular orientation session. Start by tagging the volunteers, who attended the session, then:

1. From the [menu \[pg:0215\]](#), choose Tags.
2. In the

*Add this*

**Date**

*to all of the tagged volunteer records*

section, enter the date record information you want to add to all of the tagged records.

**Please note:** If you're adding a [Checklist \[pg:0142\]](#) date and the Checklist item recurs on an annual or periodic basis, you will need to manually calculate the next due date and enter this in the Expires field. The system will *not* automatically calculate and insert an expiration date when the date is added from the Tags menu.

3. Click the **Go** button.

Volgistics inserts the Date record into all of the tagged records.

#### **Add an Assignment to all of the tagged records**

If you would like to add the same [Assignment to the Service tab \[pg:0138\]](#) of multiple volunteers at once, you can do this by:

1. From the [menu \[pg:0215\]](#), choose Tags.
2. In the *Add this **Assignment** to all of the tagged volunteer records* section, choose the name of the Assignment to be added from the dropdown list.
3. Select the [Role \[pg:0103\]](#) that tagged volunteers should be given in the chosen Assignment.
4. Enter an Assignment "From" date and "To" date, if applicable.
5. Click **Go**.

#### **Add a Mandate to all of the tagged records**

If your organization uses Volgistics' [Mandatory Service \[pg:1419\]](#) features to track volunteer progress toward service goals or requirements, there might be a need to add a service mandate to numerous records at once. You can do this by:

1. From the [menu \[pg:0215\]](#), choose Tags.
2. In the *Add this **Mandate** to all of the tagged volunteer records* section, select the applicable Mandatory Service program from the dropdown list.
3. Choose a Starting date for the service mandate, if applicable.
4. Enter a Due by date for the service mandate, if applicable.
5. Enter the number of Hours and/or [Service Measures \[pg:1557\]](#) required.
6. Click the **Go** button.

### **Send a schedule reminder to all of the tagged volunteers**

If you use Volgistics' [on-demand schedule reminders \[pg:1396\]](#) feature, you can send schedule reminders for a range of dates you specify. When you send schedule reminders through the

#### *Monthly & on-demand volunteer reminders*

setup page, they are sent to every volunteer who has an email address and/or text number on their record, is scheduled during the selected date range in any of the assignments for which the *Schedule reminders* checkbox is checked, and has not declined [schedule reminder messages \[pg:0409\]](#).

There may be a situation, however, when an organization wants to send schedule reminders only to a specific sub-group of those who would normally receive the reminders. In this case, they should take the following steps to send schedule reminders for specific dates to tagged volunteers:

1. From the [menu \[pg:0215\]](#), choose Tags.
2. Next to *Send a **schedule reminder** to all of the tagged volunteers for these dates*, choose the dates for which the schedule reminder should be sent.
3. Click the **Go** button.

The message will be sent by email or text depending on if the volunteer has [opted-in to text messaging \[pg:0323\]](#) and his or her [message preferences \[pg:0381\]](#).

### **Clear Tags**

It's a good idea to clear the tags whenever you finish using them to perform a particular task. You can always clear tags from individual records by un-checking the Tags checkbox. You can also clear tags from all records at once by:

1. From the [menu \[pg:0215\]](#), choose Tags.
2. Click the **Clear all tags** button.

If the button appears grayed out, there are not any tagged records to clear.

### **Related help**

[Help Topic 1220 \[pg:0437\]](#) - Print a Report for a Single Archived Volunteer

[Help Topic 2136 \[pg:1529\]](#) - Tags

[Help Topic 2139 \[pg:1538\]](#) - Tagging Volunteer Records

[Help Topic 2140 \[pg:1541\]](#) - How to permanently mark tagged records

[Help Topic 2160 \[pg:1858\]](#) - Update Youth Volunteers upon Adulthood

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## Tagging Volunteer Records

Help topic 2139

Added or revised 09-30-2016

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A tag is a temporary way to mark a volunteer record (or a group of records) so you can work with the record(s). This help topic explains the different ways that you can tag records. You can learn more about the tags feature itself in [help topic 2136 \[pg:1529\]](#).

### Helpful Hints for Working with Tags

• Tags are a temporary way to mark records so they only stay in place during your current **session** [\[pg:1589\]](#) or until they are cleared.

• Each **System Operator** [\[pg:0065\]](#) only sees her or his tagged records. If other operators for your account are logged in at the same time as you, you will not see their tags--and vice versa.

• Tags are cumulative for your session unless they are cleared. For example, if you tag 8 records and perform a task, and then tag 5 more records without clearing your tags, the next task you perform with tags will affect 13 records.

• You can clear tags by un-checking the box on individual records, or you can clear all tags at once by selecting **Tags** from the **menu** [\[pg:0215\]](#) and clicking the **Clear all tags** button.

### Tagging single volunteer records

To tag (or un-tag) a single record:

1. Locate the volunteer you want to tag (or un-tag). You can learn more about how to locate the record you need in [help topic 2023 \[pg:1982\]](#).
2. Click the **Tag** checkbox (un-check the checkbox to remove a tag).

If you're looking at the alphabetical list of volunteers, the checkbox appears in the Tag column next to the volunteer names:


Name	Tag	Number	Status	Type	Last Activity	Start
<input type="text" value="Search"/>		<input type="text" value="Search"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>
Armstrong, Mary	<input type="checkbox"/>	816	Inactive	Adult	06-11-2013	
Baccus, Lydia	<input type="checkbox"/>	774	Active	Adult	01-28-2016	08-08-2012
Bailey, Victor	<input type="checkbox"/>	1155	Applicant	Adult	06-11-2013	
Bargas, Jessica	<input checked="" type="checkbox"/>	830	Applicant	Adult	06-11-2013	
Barker, Geraldine	<input type="checkbox"/>	910	Active	Adult	01-27-2016	03-01-1993
Barnes, Merry	<input type="checkbox"/>	69	Active	Adult	01-27-2016	11-07-2012

If you're inside a volunteer's record, the Tagged checkbox is located near the top of the page:


### Bargas, Jessica


Core Profile Service Schedule History Contacts Notes Vic Docs

Save Cancel Archive Delete Combine New Previous Next

Tagged  Copy

**Name**

Last name:  Number:  

First name:  Status:  

A record is tagged if the checkbox is checked. You do not need to save a volunteer record to make a tag "stick."

### Tagging a group of volunteer records

There are various ways to bring up a list of volunteer records. For example, you can bring up groups of records on the Volunteers page using one of the methods shown in [help topic 2023 \[pg:1982\]](#). Or you can bring up a list of volunteers for an assignment as shown in [help topic 2221 \[pg:0131\]](#).

Regardless of how the list of volunteers was created, in most cases there will be an option to tag (or un-tag) all of the records on the page at once. The majority of time this will be done with the **Tag these** or **Un-tag these** buttons. Here is how these buttons look on the daily view of your master schedule:

	11:00 a	3:00 p	<input type="checkbox"/>	Parker, Louise	<input checked="" type="checkbox"/>	<a href="#">Edit</a>	<a href="#">Remove</a>
2 volunteers scheduled, 1 unfilled openings							
<b>Surgery Waiting Room [Main Hospital\Surgery]</b>							
<input type="checkbox"/>	7:00 a	11:00 a				<a href="#">Fill</a>	<a href="#">Close</a>
	11:00 a	3:00 p	<input type="checkbox"/>	Farr, Cody	<input checked="" type="checkbox"/>	<a href="#">Edit</a>	<a href="#">Remove</a>
1 volunteers scheduled, 1 unfilled openings							
<b>Total</b>							
39 volunteers scheduled, 14 unfilled openings							
<input type="button" value="Tag these"/>		<input type="button" value="Un-tag these"/>					

On the Volunteers page, the **Tag these** and **Un-tag these** buttons are simply called **Tag** and **Un-tag** as shown below:

## 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

Messages

Tag Un-tag

Show 250 entries

Showing 1 to 30 of 30 entries

Name	Tag	Number	Status	Type	Last Activity	Start
Search		Search		Search	Search	Search
Bailey, Victor	<input type="checkbox"/>	1155	Applicant	Adult	06-11-2013	
Barker, Geraldine	<input type="checkbox"/>	910	Active	Adult	03-16-2016	03-01-1993
Becker, Anna	<input type="checkbox"/>	461	Active	College	03-16-2016	06-15-2010
Burger, James	<input type="checkbox"/>	91	Active	Adult	02-27-2016	05-28-2003
Cook, Chantel	<input type="checkbox"/>	747	Inactive	Adult		

### Progressively adding tags

There may be times when you need to identify all of the volunteers who have any one of several different items. You can do this using tags. Here's an example:

An organization has a series of volunteer teams identified by color. For instance, they have a Red team, Green team, Blue team, and so forth. Each volunteer's team designation is recorded on their [Core tab \[pg:1868\]](#) with a [Flag \[pg:0212\]](#).

Today the organization needs to send an email message to all of the volunteers who serve on any of the Yellow, Orange, or Red teams. There's an easy way, using tags.

Start by clearing any tags that may have already been set:

1. Choose Tags from the [menu \[pg:0215\]](#).
2. Click the **Clear all tags** button.

Next, tag all of the volunteers on the Yellow team:

1. Choose Volunteers from the [menu \[pg:0215\]](#).
2. Under *Include*, select *Yellow team* from the Flag field.
3. Click the *All* link near the top of the page.
4. If necessary, select *All* from the *Show XXXX entries* dropdown so that all Yellow team volunteers are listed.

The screenshot shows the 'Volunteers' page in the Volgistics system. At the top left, there is a sidebar with navigation links: Volunteers (highlighted), Assignments, Coordinators, Schedule, Tickler, Post, Tags, Sets, Print, Mailbox, and Who's Here. The main content area is titled 'Volunteers' and features a navigation bar with letters A-Z and 'All'. Below this, there are buttons for 'Tag' and 'Un-tag', and an information icon. A 'Show' dropdown menu is open, showing options for 'All', '1000', '2500', and '5000' entries. A red arrow points to the 'Tag' button. Below the dropdown, there are search fields for 'Name', 'Tag', 'Group name', and 'Street'. The table below shows two volunteer records:

Name	Tag	Group name	Street	City
Anderson, Lionel	<input type="checkbox"/>	Puritan Food Stores, Inc.	810 Bostwick Blvd.	Hamil
Armstrong, Marv F	<input type="checkbox"/>		4985 Malow Court	Casc

5. Click the **Tag** button located in the upper left corner.

Now you have all of the Yellow team volunteers tagged. Next you tag all of the Orange team volunteers, by following the same steps except select the *Orange team* Flag in step 2. Note that if an individual volunteer serves on both the Yellow team and the Orange team, their record is only tagged once.

Finally, follow the same steps except select the

*Red team*

Flag in step 2. When you're finished, you have all of the Yellow, Orange, and Red team volunteers tagged. Now you're ready to send your email to all your tagged records as shown in [help topic 2194 \[pg:0403\]](#).

## Related help

### How to Permanently Mark Tagged Records

Help topic 2140

Added or revised 10-02-2012

[Tags \[pg:1529\]](#) are a useful tool for temporarily marking volunteer records, but what if you've tagged some volunteer records, and now you want to make the marking permanent so you can pull the same group up again later? You can do this by adding a 'Flag' to the tagged records, and then using that Flag to locate the same group again in the future, or at other computers.

Here's a step-by-step example of how to do this:

Suppose you've tagged the volunteers you want to invite to serve on a new 'Policy Review' committee and now you want to permanently mark these volunteers so you can easily locate them again in the future. You can do this by adding a 'Policy Review Committee' *Flag* to their records.

Start by creating a new Flag for the 'Policy Review Committee:'

1. From the [menu \[pg:0215\]](#), select 'Setup.'
2. Click 'Field options,' and then select the 'Core tab' (the Core tab is where the Flag field is located).

3. Select 'Flags.'

4. Enter 'Policy Review Committee' in the "Add a new item" field, and then click the **Save** button.

Now you're ready to add the 'Policy Review Committee' Flag to all of the tagged records:

1. From the [menu \[pg:0215\]](#), select 'Tags.'

2. Select 'Policy Review Committee' from the *Add this **Flag** to all of the tagged records* field.

3. Click the **Go** button.

Once you click 'Go,' Volgistics adds the Flag you selected to each of the volunteer records currently tagged.

Now you can clear the tags or close Volgistics, and you'll still be able to easily locate all of the 'Policy Review Committee' volunteers in the future.

To view a list of all of the 'Policy Review Committee' volunteers later:

1. From the [menu \[pg:0215\]](#), choose 'Volunteers.'

2. If you currently have any other *Include* options selected, click the 'Clear' link that appears under the *Include* section to clear them.

## 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](#)

### Include

Status:    
Type:    
Flag:    
Site:    
Set:    
Tags:    
[Clear](#)

3. Under the *Include* section, choose 'Policy Review Committee' in the 'Flag' field.

## 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](#)

### Include

Status: Any   
Type: Any   
Flag: Policy Review Committee   
Site: Any   
Set: Any   
Tags: Any   
[Clear](#)

4. Click the "All" link near the top of the Volunteers window. Volgistics will display the list of all of the 'Policy Review Committee' volunteers.

## 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](#)

### Include

Status: Any   
Type: Any   
Flag: Policy Review Committee   
Site: Any   
Set: Any   
Tags: Any   
[Clear](#)

### Related help

- [Help Topic 2137 \[pg:1529\]](#) - Tags
- [Help Topic 2137 \[pg:1530\]](#) - Working with tags
- [Help Topic 2139 \[pg:1538\]](#) - Tagging Volunteer Records
- [Help Topic 2263 \[pg:0212\]](#) - Using the Type and the Flags Fields

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## How do I enter a training course for lots of volunteers in one step?

Help topic 2151

Added or revised 05-19-2011

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**Question:** How do I enter a training course for lots of volunteers in one step?

A number of volunteers all attended a training course that I track in the Dates box on the History tab. Is there a way to enter a training record for all of these volunteers in a single step?

**Answer:** Yes. You can tag the volunteers who attended the course, and then use the Tag feature to insert a training record for all of the tagged records in one step.



If you haven't done so already, start by adding the training activity you want to record training for to the 'Class event' field on the History tab. For step-by-step instructions on how do this visit [How do I track volunteer training? \[pg:1853\]](#).

Then:

1. Use the Tag checkbox to tag each of the volunteers who attended the course.
2. Choose Tags from the [menu \[pg:0215\]](#).
3. In the "Add this Date to all of the tagged records" section, make the following entries:

**Add a:** Select "Class" from the drop down list

**Event:** Choose the class the tagged volunteers attended

**Date:** Enter the date of class

**Notation:** select "Attended"

4. Click the **Go** button.

The "Dates" box on the History tab will now show that the tagged volunteers each attended the selected training event on the date you specified.

Anytime you use the Tag feature, be sure you clear the tags from the tagged records before you start another task using tags.

To clear the tags:

1. Choose Tags from the [menu \[pg:0215\]](#).
2. Click the **Clear all tags** button.

---

## Using Tags with Sets

Help topic 2186

Added or revised 07-22-2009

---

You can use the [Sets \[pg:0858\]](#) and Tags features together to mark very specific groups of volunteers for reporting or mailing purposes.

Combining Sets Example:

You have these three separate Sets already defined:

2005 Corporate Volunteers

2004 Corporate Volunteers

2003 Corporate Volunteers

Today you want to send an email message to everyone who was a corporate volunteer in 2003, 2004, or 2005. Rather than create a brand new Set, you simply tag all of the volunteers in the '2005 Corporate Volunteers' Set, then you tag all of the volunteers in the '2004 Corporate Volunteers' Set, and lastly you tag all of the volunteers in the '2003 Corporate Volunteers' Set. Now your tagged records include the 2003, 2004, and 2005 corporate volunteers, and you simply send your email message to the tagged volunteers.

## Excluding Sets Example:

You've been asked to print a list of all volunteers, except for 'auxiliary volunteers,' 'interns,' and 'student volunteers.' You already have three different Sets defined that *include* 'Auxiliary volunteers,' 'Interns,' and 'Student volunteers.' To get a list that contains all volunteers *except* these, you first tag all of the volunteers in your database, then you un-tag the volunteers in the "Auxiliary Volunteers" Set, the volunteers in the 'Interns' Set, and the volunteers in the 'Student Volunteers' Set. Now your tagged records include all volunteers except any that are auxiliary, intern, or student, and you simply print a list that includes all of the tagged volunteers.

## Clearing tags

Before you begin working with tags it's a good idea to make sure you don't already have any tagged records left over from an earlier task where you used tags. To clear any tags that might exist:

1. Choose 'Tags' from the [menu \[pg:0215\]](#).
2. If there are any records currently tagged, click the **Clear all tags** button.

## Tag all of the volunteers in a Set:

1. Choose Volunteers from the [menu \[pg:0215\]](#).
2. Under the "Include" section, use the "Sets" dropdown list to select the Set you want to test, as shown here:



3. Click the 'All' link near the top of the Volunteers page to display a list of all of the volunteers in the Set.

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**Volunteers**

Assignments  
Coordinators  
Schedule  
Tickler  
Post  
Tags  
Sets  
Print  
Mailbox  
Who's Here  
Setup  
Welcome  
Help  
Exit

**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](#)

**Include**

Status: Any  
Type: Any  
Flag: Any  
Site: Any  
Set: Any  
Tags: Any  
Kind: Any

[Clear](#)

Advanced options

4. Click the **Tag these** button at the bottom of the list.

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**Volunteers**

Assignments  
Coordinators  
Schedule  
Tickler  
Post  
Tags  
Sets  
Print  
Mailbox  
Setup

**Volunteers**

<a href="#">Watson, Elizabeth</a>	<input type="checkbox"/>	8192 Third Street	Mt. Pilot
<a href="#">Weinwright, Sam</a>	<input type="checkbox"/>	2371 Maple Street	Bedford Falls
<a href="#">Willis, Ron</a>	<input type="checkbox"/>	9122 Ellsworth	Bedford Falls
<a href="#">Wilson, Nancy</a>	<input type="checkbox"/>	812 1st Street Apt 56	Bedford Falls

31 volunteers listed

[New volunteer](#) [Tag these](#) [Un-tag these](#)

[Top](#)

All of the volunteers in the Set you selected are now tagged.

#### Un-tag all of the volunteers in a Set:

1. Choose Volunteers from the [menu \[pg:0215\]](#).
2. Under the "Include" section, use the "Sets" dropdown list to select the Set you want to test, as shown here:
3. Click the 'All' link near the top of the Volunteers page to display a list of all of the volunteers in the Set.
4. Click the **Un-tag these** button at the bottom of the list.

The screenshot shows the 'Volunteers' page in the Volgistics interface. On the left is a navigation menu with 'Volunteers' selected. The main content area displays a list of four volunteers with their names, checkboxes, addresses, and locations. Below the list, it indicates '31 volunteers listed' and provides buttons for 'New volunteer', 'Tag these', and 'Un-tag these'. The 'Tag these' and 'Un-tag these' buttons are circled in red.

Name	Checkbox	Address	Location
<a href="#">Watson, Elizabeth</a>	<input type="checkbox"/>	8192 Third Street	Mt. Pilot
<a href="#">Weinwright, Sam</a>	<input type="checkbox"/>	2371 Maple Street	Bedford Falls
<a href="#">Willis, Ron</a>	<input type="checkbox"/>	9122 Ellsworth	Bedford Falls
<a href="#">Wilson, Nancy</a>	<input type="checkbox"/>	812 1st Street Apt 56	Bedford Falls

**Tag all of the volunteers in your database:**

Start by checking to be sure there are not any Include options set on the Volunteers page like this:

1. Choose Volunteers from the [menu \[pg:0215\]](#).
2. Under the "Include" section click the "Clear" link.

The screenshot shows the 'Volunteers' page with the 'Include' filter section expanded. It contains several dropdown menus for filtering: Status (Active), Type (Any), Flag (Any), Site (Any), Set (Expired Texting & Driving), Tags (Any), and Kind (Any). Below these filters is a 'Clear' link with an upward arrow, which is circled in red. An 'Advanced options' button is also visible at the bottom of the filter section.

Next:

1. Click the 'All' link near the top of the Volunteers page to display a list of all of the volunteers in the Set.

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**Volunteers**

Assignments  
 Coordinators  
 Schedule  
 Tickler  
 Post  
 Tags  
 Sets  
 Print  
 Mailbox  
 Who's Here  
 Setup  
 Welcome  
 Help  
 Exit

**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](#)

**Include**

Status: Any  
 Type: Any  
 Flag: Any  
 Site: Any  
 Set: Any  
 Tags: Any  
 Kind: Any

[Clear](#)

Advanced options

2. Click the **Tag these** button at the bottom of the list.

volgistics™

**Volunteers**

Assignments  
 Coordinators  
 Schedule  
 Tickler  
 Post  
 Tags  
 Sets  
 Print  
 Mailbox  
 Setup

**Volunteers**

<a href="#">Watson, Elizabeth</a>	<input type="checkbox"/>	8192 Third Street	Mt. Pilot
<a href="#">Weinwright, Sam</a>	<input type="checkbox"/>	2371 Maple Street	Bedford Falls
<a href="#">Willis, Ron</a>	<input type="checkbox"/>	9122 Ellsworth	Bedford Falls
<a href="#">Wilson, Nancy</a>	<input type="checkbox"/>	812 1st Street Apt 56	Bedford Falls

31 volunteers listed

[New volunteer](#) [Tag these](#) [Un-tag these](#)

[Top](#)

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## Entering a Volunteer's Past Awards

Help topic 2146

Added or revised 01-29-2013

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If you want to [manage volunteer recognition \[pg:1551\]](#) information in Volgistics, and you have records (in another program or on paper) of when volunteers received awards in the past, you should enter these past awards into Volgistics (if they're not already there). Entering a volunteer's past awards makes your Volgistics database more complete, and it gives Volgistics a way to know which award a volunteer received last (Volgistics needs to know this in order to determine which award they should receive next).

If your award names are already setup in Volgistics, you're ready to start entering your old award records. If you have not setup your award names in Volgistics yet, you should do this first. [Help topic 2287 \[pg:0909\]](#) explains how to do this.

If your awards are setup to be sequential (meaning a volunteer is eligible for a 100 hour award, a 500 hour award, a 1,000 hour award, etc.), you should decide whether you will enter each of your volunteers' previous awards or just their highest award received. Entering all of their previous awards will give you a complete history of awards received. However, this will take more time than just entering the highest award given.

If you decide to enter just the highest or most recent award, and your awards are setup to be given sequentially, you will want to make sure your settings on the Awards Ground Rules page are setup to only show eligibility for the highest level achieved. Otherwise all the sequential awards will appear on the volunteer's History tab. [Help topic 2286 \[pg:0908\]](#) explains how to do this.

There are two ways you can enter past awards for volunteers. One individual at a time, or for an entire group if they all received the same award on the same date.

### To enter a past award for an individual volunteer:

1. Open the volunteer record for a volunteer for whom you want to enter a past award.
2. Choose the History tab
3. Under "Dates," use the "Add" box to make the following entries:
  - **Add a:** Select "Award" from the drop down list
  - **Event:** Choose the award you want to enter from the dropdown list
  - **Date:** Enter the date the past award was given
  - **Notation:** select "Presented"
4. Click the **Save** button in the Add box.

The *Dates* box will now show that this volunteer received the selected award.

### To enter past awards for an entire group of volunteers at once if they all received the same award on the same date:

1. Use the Tag checkbox to tag each of the volunteers who received a particular award on a particular date. [Help topic 2139 \[pg:1538\]](#) shows some of the ways this can be done.
2. Choose Tags from the [menu \[pg:0215\]](#).

3. In the "Add this Date to all of the tagged records" section, make the following entries:

- **Add a:** Select "Award" from the dropdown list
- **Event:** Choose the award the tagged volunteers received
- **Date:** Enter the date the past award was given to the tagged volunteers
- **Notation:** select "Presented"

4. Click the **Go** button.

The *Dates* box on the History tab will now show that the tagged volunteers each received the selected award on the date you specified.

If you use the Tag feature to enter past awards like this, be sure to clear the tags from the tagged records before you move on to the next award.

To clear the tags before starting the next award:

1. Choose Tags from the [menu \[pg:0215\]](#).

2. Click the **Clear all tags** button.

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## How can I create an award based on service performed in a 12 month period?

Help topic 2331

Added or revised 05-09-2008

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Volgistics can automatically identify volunteers as eligible for awards that are based on volunteer service, such as the number of hours served, or the number of years a volunteer has served. Awards may be based on a volunteer's 'life' service through the current date or a particular cut-off date; or they may be based on service performed during the last year only.

Typically, when an award is based on service performed during a specific year, the award is presented at some point *after* that year has ended. For example, awards based on service performed in 2007 are typically given sometime in 2008 (once volunteers have completed all of their 2007 service).

To setup these awards in Volgistics you set the award criteria so the award is based on volunteer service performed during the last calendar or fiscal year, as shown below (more detailed instructions on how to setup award criteria are available in [help topic 2287 \[pg:0909\]](#)).

The screenshot shows a configuration window for award criteria. At the top, there is a dropdown menu set to "Any assignment". Below this, a checkbox is checked, followed by the text "They have at least" and a text input field containing "100", and another dropdown menu set to "Hours". Below that, there is another "in" dropdown menu set to "Any assignment". At the bottom, there are two rows of radio button options. The first row has three options: "each year for at least" (with a text input field containing "0"), "consecutive", "fiscal" (which is selected), and "calendar years". The second row has three options: "during the last", "fiscal", and "calendar year" (which is selected).

In the example pictured above, the award is given to volunteers who perform at least 100 hours during a calendar year.

Since you cannot know for sure how many hours each volunteer will serve in 2007 until 2007 has ended, volunteers who meet the award criteria will appear eligible for this award beginning on January 1, 2008. You can prepare for volunteer recognition based on 2007 hours using Volgistics anytime after December 31, 2007 in this example.

Awards based on service during the last year may be based on service performed during the last calendar year (January through December), or during the last **fiscal year** [pg:0062]. If the award is based on service performed during the last *fiscal year*, volunteers who meet the award criteria will appear eligible for the award as soon as a fiscal year ends. For example, an award based on service performed during a fiscal year that ends on June 30th will appear eligible for the award beginning on July 1st.

## Related help

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# Tracking Volunteer Recognition

Help topic 3022

Added or revised 11-17-2016

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If your organization gives formal volunteer recognition, such as Awards for volunteer service, you can use Volgistics to manage your recognition program. You can track Awards based on measurable volunteer service (such as hours and years of service), as well as "subjective" Awards (the kind where a committee decides who the recipient will be).

For Awards based on measurable volunteer service - such as hours served or years of service - Volgistics will automatically keep track of who is eligible for each Award based on the service recorded for them in the database. You can view which volunteers are eligible for any Award at any time, print lists of Awards and which volunteers are eligible for them (such as "pin lists"), easily post the Awards you've presented; and view or print each volunteer's Award history. You can present Awards as often as you choose: monthly, semi-annually, or annually for example.

This help topic starts by looking at two steps you must perform when you're just getting started with Volgistics. You need to complete these two steps before Volgistics can begin managing your Awards automatically:

- Setting up Awards
- Catching-up Volgistics by recording the Awards volunteers have already received

This help topic also describes the steps you take to manage volunteer recognition activities in the order they're often performed:

- Determining who is ready to receive Awards
- Printing reports listing volunteers eligible for each Award
- Printing reports of volunteers' Award history
- Recording the Awards you have presented in the database once they have been given

## Setting up Awards

If you've converted data from another program or if you've inherited a Volgistics database someone else created, some or all of the Awards you give volunteers may already be setup. In this case you can follow along with this section to learn about how to setup Awards, or you can skip ahead to the next section.



If you're just getting started from scratch, you'll need to initially setup your volunteer Awards. This is something you only need to do once when you're getting started (unless you later want to change the rules you use for giving Awards, or add more Awards).

To setup a new Award:

1. Choose Setup from the [menu \[pg:0215\]](#).
2. Select "Awards."
3. Click the "Add a new Award" link. This opens the Award setup page. Help topic [2287 \[pg:0909\]](#) explains how to use the Award setup page to setup an Award. Follow those instructions to setup your first Award.
4. Click the Save button.

Your new Award is now setup in Volgistics.

You can change the way any of your Awards are setup later if you want to. To change the way an Award is setup, simply return to Setup, click "Awards," and then click on the name of the Award you want to change. Remember to click the Save button when you're finished to save your changes.

Repeat the steps listed above to create each of the Awards you want to track in Volgistics. You can track up to 120 different Awards.

### **Catching-up Volgistics to your old system**

This is the second step you'll need to perform if you're just getting started with Volgistics, or if this is the first time you're using Volgistics to prepare for volunteer recognition.

If you've never had a formal recognition program before, or you do not have any records that show which Awards volunteers have received in the past you can skip this step. However if you have an existing database or list of Awards presented to volunteers in the past, you should enter that information into Volgistics. Specifically, Volgistics needs to know what the last Award was that each volunteer received.

Here's why:

When it comes to Awards based on measurable volunteer service—like hour or years-of-service Awards—Volgistics determines which Awards a volunteer is currently eligible to receive by looking at two things:

1. How much service they have recorded
2. Which Award they received last

For example, suppose you give Awards for 500 hours of service, 1000 hours of service, and so forth. If volunteer George Bailey has 1,050 hours of service, and he has already been given the "500 hour Award" you know that he has now earned the "1,000 hour Award."

If you track volunteer service using Volgistics, Volgistics knows how many hours and years of service each volunteer has, so all it needs to know to get started with automatic Award tracking is what the highest Award is that each volunteer has already received. Once you enter this information, Volgistics can take it from there.

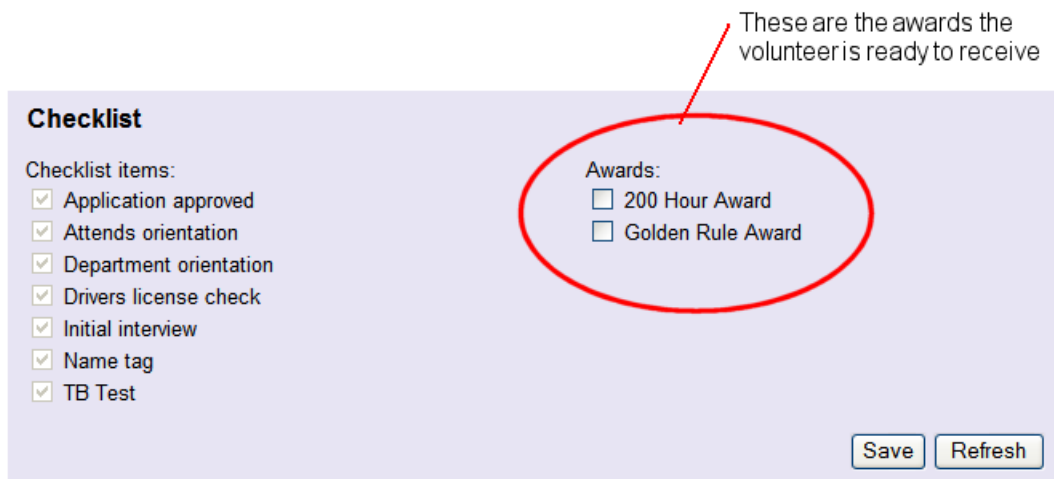
Instructions on how to enter your volunteer's past Awards are available in help topic [2146 \[pg:1549\]](#). You can either enter all of your volunteers' past Awards (if you want to keep their Award history), or you can just enter their most recent Award. If you enter only their most recent Award, and your Awards are setup to be given sequentially, make sure your settings on the Awards Ground Rules page are setup to only show eligibility for the

highest level achieved. Otherwise all the sequential Awards will appear on the volunteer's History tab. [Help topic 2286 \[pg:0908\]](#) explains how to do this.

Once you've setup your Awards, and entered (at least) each volunteer's most recent Award, you're ready to start using Volgistics to manage volunteer recognition.

### See who is ready to receive Awards

Once you've setup your Awards as explained above, you can see which Awards individual volunteers are *currently* eligible to receive by looking at the Checklist box on the History tab of their volunteer record. The Checklist box displays each of the Awards the selected volunteer is ready to receive, as shown here:



The screenshot shows a web interface titled "Checklist". On the left, under "Checklist items:", there is a list of seven items, each with a checked checkbox: "Application approved", "Attends orientation", "Department orientation", "Drivers license check", "Initial interview", "Name tag", and "TB Test". On the right, under "Awards:", there are two items with unchecked checkboxes: "200 Hour Award" and "Golden Rule Award". A red oval highlights the "Awards:" section, and a red arrow points from the text "These are the awards the volunteer is ready to receive" to the oval. At the bottom right of the interface are two buttons: "Save" and "Refresh".

You can also see lists of *all* of the volunteers who are ready to receive Awards by using the Tickler like this:

1. Choose Tickler from the [menu \[pg:0215\]](#).
2. The Tickler page includes two sections. A "Checklist" section and an "Awards" section. If any of the items in the "Checklist" section are currently checked, uncheck them. In the "Awards" section, check the Award (or Awards) you want to view a list for.
3. Click the **Go** button. You'll see a list of all of the volunteers who are ready to receive the Award or Awards you select on the Tickler page.

Volunteer eligibility for Awards based on service is updated nightly during the overnight maintenance cycle. If you have entered service hours since the last overnight maintenance cycle and want the Tickler to find eligible volunteers based on the latest service entered, click the **Re-evaluate now** button. When the date and time in the message update, the Tickler will reflect Award eligibility based on the latest service entries.

**Note:** If you setup Awards to be based on service performed "through a certain date," it will affect when volunteers will appear ready to receive the Award. Volunteers are shown to be ready for Awards that have cut-off dates if they have the required amount of service recorded *and* the cut-off date for the Award has past.

For example, if you setup a service Award to be based on service performed through the end of December 31st each year, volunteers will not appear ready to receive that Award until after December 31st (if they have the required amount of service).

### Printing reports listing volunteers eligible for Awards

You can print lists that show the Awards volunteers are currently eligible to receive like this:

1. Choose Print from the [menu \[pg:0215\]](#).
2. Expand the Awards link.
3. Choose "Award eligibility (stock)."
4. Click the "Print it" button.
5. Choose the format (PDF or Excel spreadsheet) in which you want this report to be printed, and choose which volunteers you want to include on the report. Then click the **Start printing** button.

Your report will appear in your Volgistics Mailbox within several minutes.

### **See which Awards a volunteer has received in the past**

You can see which Awards an individual volunteer has received in the past by looking at the History tab in their record.

1. Choose Volunteers from the [menu \[pg:0215\]](#).
2. Locate the record for the volunteer whose Awards you want to review.
3. Open their record and click on their History tab. The volunteer's Award history is included in the Dates box.

### **Printing volunteers' Award history**

You can also print reports that include all (or certain) volunteers, and their Award history. To do this:

1. Choose Print from the [menu \[pg:0215\]](#).
2. Expand the "Volunteer List" link.
3. Choose "Volunteer Award list (stock)."
4. Click the **Print it** button.
5. Choose the format (PDF or Excel spreadsheet) in which you want this report to be printed, and choose which volunteers you want to include on the report. Then click the **Start printing** button.

Your report will appear in your Volgistics Mailbox within several minutes.

### **Recording the Awards you have presented in the database once they have been given**

Once a volunteer is eligible to receive an Award, a [System Operator \[pg:0065\]](#) must indicate when he or she is presented with that Award. Recording the Awards a volunteer receives is an important part of tracking recognition in Volgistics as the system uses this information to determine Award eligibility, volunteer inclusion in Sets based on Award dates, and more.

There are two ways to record that an Award was presented to a volunteer: by marking the checkbox next to the Award name on the History tab Awards list, and by adding an Award date entry in the History tab Dates box.

#### Marking an Award checkbox to record that an Award has been presented

1. Choose Volunteers from the [menu \[pg:0215\]](#).
2. Choose the first letter of the Award recipient's last name at the top of the page.
3. Click on the Award recipient's name to open their volunteer record.
4. Go to the History tab.
5. Locate the Awards list, and click the checkbox next to the Award this volunteer has received.



6. Click the **Save** button.

Once the Award has been marked, an Award date entry will automatically be recorded in the Dates box on the History tab.

<b>Dates</b>		Start date: 12-22-1996	Date entered: 08-08-2007			
		Stop date:				
	Event	Date	Expires	Notation	type of test	
Status	Active	12-22-1996				Edit
Award	200+ Service Hours	01-25-2009		Presented		Edit Delete
Award	5 Hours by end of January	01-25-2009		Presented		Edit Delete

In addition, the Award will no longer be listed as one the volunteer is eligible to receive.

Making an Award date entry to record that an Award has been presented



1. Choose Volunteers from the [menu \[pg:0215\]](#).
2. Choose the first letter of the Award recipient's last name at the top of the page.
3. Click on the Award recipient's name to open their volunteer record.
4. Go to the History tab.
5. In the Dates box, scroll down to the Add box.
6. Choose "Award" from the "Add a – date" dropdown field.

7. Select the Award name from the "Event" dropdown field.

**Add**

Add a:  date

Event:

Date:   Expires:  

Notation:

8. Click the **Save** button.

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## Service Measures

Help topic 1016

Added or revised 03-29-2016

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Since many volunteer offices record volunteer service by tracking hours, Volgistics tracks volunteer hours by default; however, some organizations want to track additional types of volunteer activity. For example, an agency might want to track the number of phone calls answered by a volunteer; the number of absences a volunteer has; the number of miles put on a volunteer's vehicle during service, or the number of tours a museum volunteer has given during a particular shift. By providing service measures, Volgistics makes this possible too.

In addition to hours, an organization can track up to 14 service measures customized for their volunteers. To learn how to create a new service measure, read the help topic on [service measure setup \[pg:1406\]](#).


### Collecting or entering service measure data

As a [System Operator \[pg:0065\]](#) or volunteer posts service entries, service measure information may be entered along with volunteer hours.

When service entries are made manually, service measures appear on the Service tab in the volunteer's record. In the example shown below, three additional service measures are tracked. They are called *Phone calls*, *Mileage*, and *Tours*. Each time you add volunteer hours (or instead of entering volunteer hours) you could also enter the number phone calls made, miles driven, or tours given.


**Add**


Assignment:


Date:   From time:  am

To time:  pm

Hours:

Phone Calls:  

Mileage:  

Tours:  

To enter a value for a particular service measure, follow the procedure for [making service entries manually \[pg:1569\]](#) and enter the appropriate number in the service measure field. If, for example, a volunteer served for 3 hours and answered 20 phone calls in this time period, the System Operator would enter 3 hours and enter 20 in the Phone calls field.

You can also post service measure information if you post service using the Post page. Follow the instructions for posting hours with the Post feature detailed in the [Post page \[pg:1559\]](#) help topic.

If it suits your needs, and your account's [service level \[pg:0719\]](#) includes the [VicNet \[pg:1724\]](#) module, you can also allow volunteers to enter their own service information through the [VicNet Time Sheet tab \[pg:1460\]](#).

20	21	22	23	24	25	26
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
27	28	29				
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>				

What times did you serve?  :   until  :

Which assignment did you serve in?

How many Phone calls?

How much Mileage?

How many Tours?

**Continue**

### Including service measures on service reports

While none of the [stock report \[pg:0595\]](#) formats in Volgistics are configured to automatically include service measure information, both [Service Summary \[pg:0580\]](#) and [Service Detail \[pg:0560\]](#) reports can be customized to include service measures.

Add service measures to a new or stock service report on the report's Fields tab. If customizing a stock report, remember to choose the desired type of report and click **Clone it** to make and save any changes.

Once on the Fields tab, check the boxes next to the names of any service measures to be included as a column in the report.

Options | **Fields** | Page design | Include | Save

## Fields

[Help](#)

Choose the fields you want to appear in this report.

For each service record include...

<input checked="" type="checkbox"/> From date	<input type="checkbox"/> Source
<input type="checkbox"/> Time in	<input type="checkbox"/> Batch
<input checked="" type="checkbox"/> To date	<input type="checkbox"/> Directive
<input type="checkbox"/> Time out	
<input type="checkbox"/> Site	
<input type="checkbox"/> Place	
<input checked="" type="checkbox"/> Assignment	
<input checked="" type="checkbox"/> Hours	
<input type="checkbox"/> Hours value	
<input type="checkbox"/> Hours FTE comparison	
<input type="checkbox"/> Phone calls	
<input type="checkbox"/> Phone calls value	
<input type="checkbox"/> Mileage	
<input type="checkbox"/> Mileage value	
<input type="checkbox"/> Tours	
<input type="checkbox"/> Tours value	
<input type="checkbox"/> Unduplicated volunteer count	

Save and print the report, and retrieve it in the [Volgistics In Box \[pg:0303\]](#).

### Related help

[Help Topic 2271 \[pg:1422\]](#) - How do I track volunteer mileage?

[Help Topic 2275 \[pg:1424\]](#) - Tracking volunteer absences

[Help Topic 1017 \[pg:1406\]](#) - How to setup a service measure

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## The Post page

Help topic 1021

Added or revised 09-30-2016

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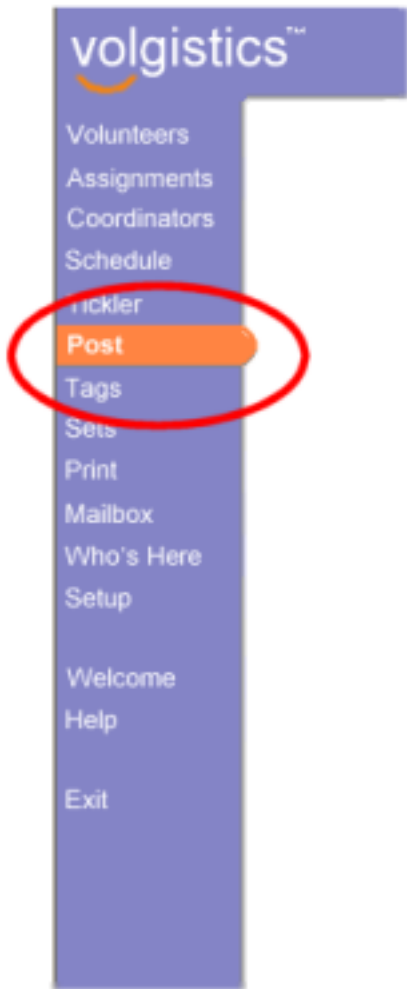
If you post volunteer service manually, the Post page provides a fast way to enter multiple service entries at the same time.

If you do not collect all (or any) of your volunteer service information with [VicTouch \[pg:1778\]](#), [VicNet \[pg:1724\]](#), or [directly from the schedule \[pg:1576\]](#), you probably post service records [manually \[pg:1569\]](#). If you post hours for many volunteers manually, the process can become cumbersome. In this situation, you can use the Post page to post hours for a whole series of volunteers at one time. This help topic explains how to use the Post page to efficiently post service records for multiple volunteers.

**Introductory page: A brief explanation of the Post feature**



The first time you select *Post* from the menu, you will see a page giving a brief explanation about what the page is used for.



If you do not want this page to show on future visits, check the box in front of "Don't show me this introduction screen in the future." Click the **Continue** button to proceed to the next page.

### **The first Post page: Choose which volunteers you want to post hours for**

The Post menu option requires a series of three pages where you will need to enter information to post hours for multiple volunteers.

On the first page, you will identify the volunteers you want to post hours for.

#### Post hours for...

Choose one of the following options:

Tagged volunteers. If you have already tagged [pg:1529] a group of volunteers for the purpose of posting hours to their records, choose this option. This option is only available when at least one volunteer is tagged in your system.

### Volunteers scheduled on this date...

. Many organizations choose to post hours for all volunteers who were scheduled on a particular day in one step. If you would like to do this, choose this option and enter the date you would like to post hours for. [Help topic 2202 \[pg:1576\]](#) explains more about how to use this option.

Volunteers in this assignment. Choose this option if you would like to post hours only for volunteers with the [Role\(s\) \[pg:0103\]](#) you selected on the [Service Posting Setup Page \[pg:1432\]](#) in a particular [assignment \[pg:0096\]](#). Select the shared assignment from the dropdown list.

Volunteers with this Type. To post hours for volunteers with a particular [Type \[pg:0212\]](#), for example all "Adult" volunteers, choose this option and select the Type of volunteer you want to post hours for from the dropdown list.

Volunteers with this Flag. To post hours for volunteers with a particular [Flag \[pg:0212\]](#), choose this option and select the Flag held by volunteers you want to post hours for from the dropdown list.

### Volunteers with last names starting with...

. You may want to post hours for groups of volunteers alphabetically by last name. This option is the most efficient if you have collected volunteer hours on time sheets as shown in [help topic 1153 \[pg:1565\]](#). To post hours by last name, choose this option and select the first letter of the volunteers' last names from the dropdown list.

### Post hours for volunteers if their **status** is...

You can choose to limit the volunteers you want to post hours for by [Status \[pg:1832\]](#) by checking one or more volunteer Statuses here. If, for instance, you chose to post hours for *Volunteers with this Type and Adult* and then marked just the box for the Status of Active, you would only be able to post hours for Adult volunteers with an Active Status. If you selected *Volunteers with this Type and Adult* and then marked all possible Statuses, you could post hours for any Adult volunteer. Please note that if no boxes are selected, volunteers with *all* Statuses will appear the same as if all of the boxes were checked.

### Sort volunteers

Choose whether you want the list of volunteers to be sorted alphabetically by their last name, or by their volunteer number.

Click the **Continue** button to view the second page in the Post procedure.

### **The second Post page: Choose the way you want service entries to appear for each volunteer in this batch**

The appearance of the second Post page will differ based on the options you select on the first Post page. If you choose to post hours for volunteers scheduled on a particular date, the only fields that will be displayed on the second Post page are service measures you have created. Otherwise, you will see options for an Assignment field, Date & time fields, an Hours field, and Service Measure fields.

### Assignment field

If all of the service you are posting is in one [assignment \[pg:0096\]](#), choose the first option (*All of the service I'm posting was performed in this assignment*) and select that assignment from the dropdown list.

If you want to choose the assignment for each volunteer from a list of their assignments only, select the second option (

*Let me choose the assignment from a list of each volunteer's assignments*

). Volunteers are linked to assignments based on the [Role\(s\) \[pg:0103\]](#) recorded for assignments on the [Service tab \[pg:0138\]](#) of their record.

If you want to choose the assignment for each volunteer and want to select it from a list of all assignments (not just the ones they have a Role in), select the third option (*Let me choose the assignment from a list of all assignments*).

#### Date & time fields

The fields that appear for entering date and time may vary depending on how you have setup your account for manual service entries. You can find more information on this in [help topic 2325 \[pg:1429\]](#).

To enter different dates and/or times on each entry, select the first option (*Let me enter the date and times on each entry*).

To post hours for volunteers who all served the same shift on the same date, select the second option (*All of the hours I'm posting are for this date and these times*) and enter the date(s) and/or time(s) of the service to be applied.

#### Hours field

If you do not want to enter the same number of hours on each entry, choose the first option (*Let me enter the hours on each entry*).

If you want to post the same number of hours to all service entries, choose the second option (*Post this many hours XX on every entry*). If you entered times in the time fields above, the correct number of hours to be applied will automatically be entered in the Hours field.

#### Service measure fields

If you have created [Service Measures \[pg:1557\]](#) to track volunteer activity other than hours (such as mileage or absences), these fields will be displayed here. For each, decide if you want to omit the information for that Service Measure, enter a number for that Service Measure on each individual entry, or apply the same number for each entry you are posting.

#### How many entries?

You might choose to post several service entries for each volunteer at the same time. For example, if you are posting hours for Active Adult volunteers and choosing the assignment from a list of each volunteer's assignments while also entering the date and time on each entry. In this case, you might want to post a particular volunteer's service in more than one assignment, or for more than one date or time. To do this, use the dropdown list to select the number of service entries you'd like to make on each volunteer's record. You can select from 1 to 12.

When you select to make multiple service entries, you do not need to use all of the spots you create. Just leave the ones you do not need blank. Having the option of creating more than one entry per volunteer can help you make more efficient use of your time.

Click the **Start posting** button to move to the next page for Posting service.

### The third Post page: Start posting

The top of this page identifies the common characteristics of entries in this batch. For instance, if all the postings will be in the same assignment, or for the same date, this will be listed at the top of the page.

Service records will be displayed for each volunteer identified by your selections on the first Post page. Enter the appropriate information in the fields for each record, or mark the "Skip" box to choose not to post an entry for a particular volunteer.

If you are [posting hours from the schedule \[pg:1576\]](#) and there is a group [scheduled to fill multiple openings slots \[pg:0753\]](#), you will see a listing for each opening slot the group is filling. There are two ways you can handle this.

One is to use each entry and set the Volunteers field to one (1). When this is done each entry will be shown on the [Service tab \[pg:1579\]](#) of the group record.

Another option is to tally the number of slots the group is filling and enter this number in the Volunteers field on one entry. Check the "Skip" box on the other entries so service is not posted for those entries. Please remember with this option that some entries for the group may appear on upcoming pages. Because there is not a way to return to a Post page after you have passed it, you may want to refer to the Schedule tab of the group's record to get the total number of opening slots the group is filling.

At the bottom of the page, choose the **Post this page**, **Post then quit** or **Skip this page** button until you're done entering service.

Once you have posted hours for this batch, you can click the **Print batch report** button to print a [Batch Report \[pg:0599\]](#) listing each of the hour entries you made in this batch. A Batch Report is often used to compare the information you posted to the information on a written time sheet.

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## FTE

Help topic 1036

Added or revised 10-14-2015

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Many businesses and organizations use 'full-time-equivalent employees,' or FTE' as a unit of measurement for counting employees. A full-time-employee is usually considered one who works 40 hours per week (although this number may vary by organization). Using FTE to describe the human resources allocated to - or needed to perform - a particular task lets you compare apples to apples. A department that has six half-time workers and a department that has three full-time workers both have three FTEs, as an example (because six half-time workers equal three full-time workers).

While volunteers are generally classified differently than employees, FTE can be a useful method for leaders of volunteer programs to describe the amount of service performed by volunteers (overall or in a particular area) in terms understood by human resource professionals and board members. Several Volgistics reports ( [Service details \[pg:0560\]](#), Service summary) can translate the number of hours served by volunteers into an FTE value for this purpose.

Volgistics uses the FTE measurement to describe the number of full-time workers that it would take to serve the same number of hours as an individual volunteer or group of volunteers (not the number of volunteers who individually serve 'full-time').

For example, suppose ten volunteers each serve four hours per week providing visitor information at an organization's information desk. Collectively these ten volunteers work the same amount of time as one FTE (ten times four hours each equals 40 hours per week, or one FTE). Or, suppose 200 volunteers each serve six hours during a week-long festival. Collectively these festival volunteers work the same amount of time as thirty FTEs (200 times six equals 1,200 hours per week, divided by 40 hours equals 30 FTEs).

### How Volgistics calculates FTEs

By default, Volgistics calculates FTEs at the rate of 40 hours per week, although you can tailor this rate to your organization (see below). So, every 40 hours served by volunteers in a one week period equals one FTE.

Most Volgistics reports calculate volunteer hours monthly (or quarterly, or annually), rather than weekly. When you calculate FTE for monthly periods rather than weekly periods you must convert the weekly rate into a monthly rate. To make this conversion Volgistics multiplies the weekly rate by 52 (the number of weeks in a year), and then divides the result by 12 (the number of months in a year). Using the default rate of 40 hours per week, the monthly FTE would be 173.3 hours per month. Here's the math:

40 hours per week times 52 weeks equals 2,080 hours per year.  
2,080 hours per year divided by 12 months equals 173.3 hours per month.

So, if your service report is for a period of one month, every 173.3 hours served by volunteers equals one FTE. If volunteers collectively serve 6,280 hours in one month they worked the same amount of time as 36.24 full-time workers that month (6,280 divided by 173.3 equals 36.24, when rounded). If a service report is for a period of one year, every 2,080 hours served collectively by volunteers in a year equals one FTE. (173.3 hours per month, times 12 months equals 2,080 hours per year). If volunteers collectively serve 66,560 hours during a one year period they worked the same amount of time as 32 FTEs during that year (66,560 divided by 2,080 equals 32).

### Setting your FTE rate

Volgistics defaults to an FTE rate of 40 hours per week. You can change this if your organization uses a different rate (such as 38.5 hours per week). To change the rate used to calculate FTE:

1. Click [Setup \[pg:0887\]](#) on the [menu \[pg:0215\]](#).
2. Click *Service tracking*, and then choose *Ground rules*.
3. Scroll down to the *Full time equivalent* section and enter the weekly rate you want to use.

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## Merit Hours

Help topic 1100

Added or revised 12-18-2013

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In some situations, it may be desirable to adjust volunteer hours to reflect more or fewer hours than were actually served. The optional merit hours feature allows an organization to do so.

For example, merit hours can be used to give "time-and-a-half" or "double time" for special reasons, such as volunteer Assignments that are more complex or difficult to recruit for; shifts that take place on a [holiday \[pg:1391\]](#); to account for additional drive or preparation time; or to deduct time spent at lunch or on break.

By defining up to four merit hour rules, which can be based on a broad range of volunteer and service characteristics, a Volgistics [System Operator \[pg:0065\]](#) can apply merit hours as needed. Merit hours can also be based on drive or travel times separately from the four merit hour rules. If merit hours are used, Volgistics automatically calculates the additional or deducted time indicated by the merit hour rules.

These adjusted hours appear on the [Service tab \[pg:1581\]](#) in volunteer records by default, and optionally on [reports \[pg:0430\]](#) under the heading *Merit hours*. Volgistics continues to track actual volunteer hours as well.

Merit hours can be included on reports regardless of whether or not they are included on the Service tab in the volunteer record.

#### Related help

[Help Topic 1101 \[pg:1409\]](#) - How to Setup Merit Hours

[Help Topic 1160 \[pg:0430\]](#) - Including Merit Hours on Reports

[Help Topic 1210 \[pg:1416\]](#) - How to Setup Travel Time Merit Hours

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## How to Efficiently Collect Volunteer Hours with Time Sheets

Help topic 1153

Added or revised 09-30-2016

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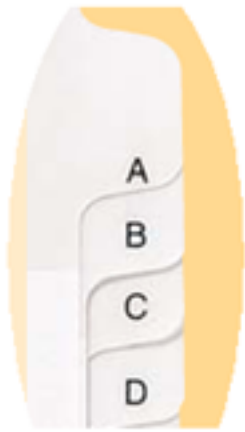
The VicTouch module is the best way to collect volunteer hours, as it can eliminate manual hour entry entirely. Likewise, VicNet can reduce or eliminate a volunteer office's need to gather service information. Still, some organizations must continue to collect hours on printed time sheets and then [post them manually \[pg:1569\]](#) in Volgistics.

If most volunteers are scheduled in advance, an organization can print [time sheet views of the schedule \[pg:1578\]](#), and then [post hours from the schedule \[pg:1576\]](#) later. What follows is a suggestion for organizations where volunteers are not typically scheduled in advance to efficiently organize manual time sheets.

1. Pre-print time sheets like these:

<b>Volunteer Sign-in Sheet</b>					
This page is for volunteers whose last name begins with the letter <b>"A"</b>					
<b>Please print!</b>					
Your name	Volunteer Assignment you have come to perform	Date	Time in	Time out	Office use only

2. Put them in a binder with tabs like these:



When volunteers arrive and depart, they should open the time sheet binder to the tab for the first letter of their last name and sign-in and sign-out on that page.

Then a system operator should use the [Post page \[pg:1559\]](#) in Volgistics to post hours manually. When choosing the volunteers you want to post hours for, select "Volunteers with last names starting with 'A'."

Post hours for...

- Tagged volunteers
- Volunteers scheduled on this date:
- Volunteers in this assignment:
- Volunteers with this Type
- Volunteers with this Flag
- Volunteers with last names starting with

Follow the Post procedure for this group of volunteers, referring to the time sheet book's alphabetized pages to determine how many hours should be posted for each volunteer in the "A" section. Follow the same process for volunteers in the "B" section, "C" section, and so forth. Initial the "Office use only" column on each line as the hours are posted.

As an alternative to pre-printing time sheets by letter for volunteers to sign-in and out by last name, you might choose to pre-print time sheets for each Assignment volunteers are serving in. In this way, volunteers would open the book to the appropriate Assignment and sign-in and out on that page. Then you would post hours by Assignment on the Post page in Volgistics, like this:

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## How can I find all of the volunteers with a service record missing an Assignment?

Help topic 1164

Added or revised 04-08-2016

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While most Volgistics users collect the name of the Assignment as part of their service records, a user might occasionally find that a number of hours are not attributed to any Assignment. This can happen when the Assignment name is unintentionally omitted when posting a service entry.

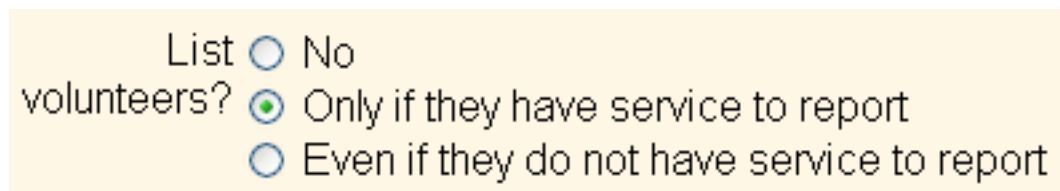
On a report, these hours are attributed to Assignments called "(None)." When this happens, there are two things users often want to know:

1. Which volunteer records are the sources of the service entries not attributed to an Assignment *in this particular service report*?

2. Do other volunteers besides those represented in this report have service entries not associated with an Assignment? If so, who are they?

### **Which volunteer records are the sources of the service entries not attributed to an Assignment in this report?**

This first question can often be answered with one simple step. Unless a report is organized by volunteer, neither the service summary nor service details reports list volunteer names by default. That is, when a service report is organized by Site; Site and Place; Site, Place and Assignment; Type, Date; Cluster, or Cluster, Site, Place and Assignment, it does not automatically include the names of volunteers responsible for the service. To determine which volunteer records are associated with the service, you will need to choose to list volunteers on the report's Options tab and print the report again.



List  No  
volunteers?  Only if they have service to report  
 Even if they do not have service to report

Service entries with the "None" Assignment will now be associated with the name of the volunteer who completed that service.

### **Do other volunteers besides those represented in this report have service entries not associated with an Assignment? If so, who are they?**

Answering this question requires that you first create a Set to identify such volunteers and then print a volunteer list report including only volunteers in the Set.

Create the Set like this:

1. Choose Sets from the menu.
2. Click on Create a new set.



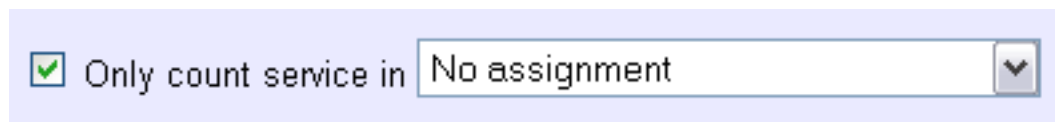
3. Give the Set a name (i.e. "Service records without Assignments") and choose to include volunteers in the Set based on "their service."

4. Click Go.

5. Define the Set rule to include volunteers if they have at least 0:01 hours in the time period of interest (i.e. the previous month, as illustrated below, the last year, etc.).



6. At the bottom of the rule definition box, mark the checkbox next to "Only count service in..." and select "No assignment" from the drop down list.



7. Click Finished.

Now you should create a new volunteer list report that includes only volunteers in the Set. A volunteer list report will show the names of volunteers with service records not associated with an Assignment. You can use this list to identify which volunteer records you should go into and edit service records to include Assignment names.

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## How do service records get into Volgistics?

Help topic 1166

Added or revised 09-30-2016

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There are several ways you can enter or collect volunteer service information in Volgistics:

1. If your volunteers all serve at primarily one or several fixed locations, such as a hospital, clinic, museum, zoo, or a performing arts center, you can use the [VicTouch \[pg:1778\]](#) module to collect volunteer service. The VicTouch module provides an interactive computer station (optionally with a touch screen monitor) where volunteers can sign-in and out, and also receive messages, check their schedules, and more. VicTouch can eliminate manual hour record keeping entirely in many organizations.

2. You can use the [VicNet \[pg:1724\]](#) module if you would like some or all of your volunteers to post their own volunteer hours online from home (or any computer with an Internet connection). This option can also reduce or eliminate the need for manual hour record keeping. You will need to setup the VicNet [Time Sheet tab \[pg:1460\]](#) in order to do this.

3. If you pre-schedule all or most of your volunteers in advance, you can use the Volgistics Post page to [post volunteer hours directly from your schedules \[pg:1576\]](#). In addition to posting hours from the schedule, the Post page also lets you post hours for tagged volunteers, volunteers in a particular Assignment, with a certain Type, with a certain Flag, or with last names starting with a specific letter. You can find out more about how the Post page works in [help topic 1021 \[pg:1559\]](#).

4. If you want to track volunteers, and you cannot use any of the methods described above to collect or post volunteer hours, you can collect hours "on paper" and then enter them manually later. If you enter volunteer hours manually from [paper time sheets \[pg:0666\]](#), you can use the Post page to speed-up the manual hour entry process; or you can always [post hours manually \[pg:1569\]](#) in individual volunteer records.

Choose the method that best suits your needs. No matter which way you choose to collect service, hours will appear in Volgistics as part of service records, and these drive your reports. You can collect some hours one way, and other hours a different way, and they'll be in a standard format in your database. You can also start out entering hours manually and then switch to VicTouch. They all feed into the same database.

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## How do I make a single hour entry manually?

Help topic 2021

Added or revised 09-30-2016

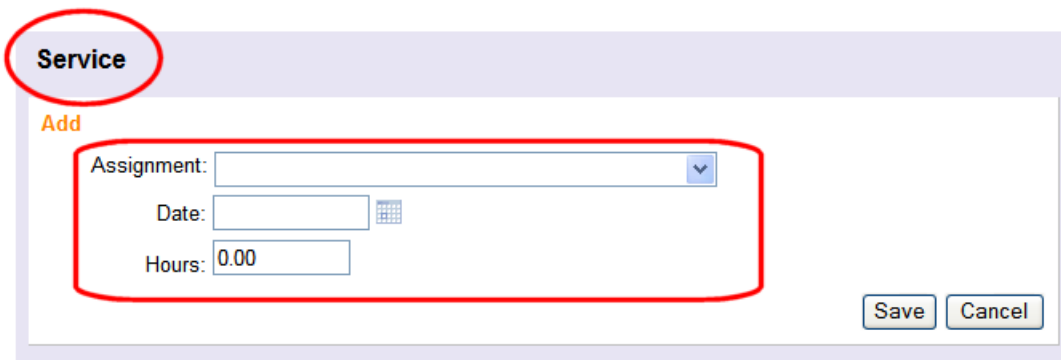
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This help topic explains how you post an hour record manually for an individual volunteer. If you want to post hours manually for a group record, see the [Posting Service for Groups \[\\_\\_\\_\\_\\_\]](#) section of help topic 1045.

Please note that in addition to making hour entries manually for individuals and groups, service hours can also be recorded through the methods shown in [help topic 1166 \[pg:1568\]](#).

To post an hour record manually for an individual volunteer:

1. Choose *Volunteers* from the [menu \[pg:0215\]](#).
2. Locate the record for the volunteer for whom you want to make an hour entry.
3. Open the selected volunteer's record and click the *Service tab*.
4. Use the *Add* box in the Service section to enter the information for the new hour entry.



The screenshot shows a software interface with a tab labeled "Service" circled in red. Below the tab is an "Add" section, also circled in red. This section contains three input fields: "Assignment:" with a dropdown arrow, "Date:" with a calendar icon, and "Hours:" with the value "0.00". At the bottom right of the "Add" section are two buttons: "Save" and "Cancel".

5. Click the **Save** button to save the new hour record.

**Service**

**Add**

Assignment:  ▼

Date:  

Hours:

The new hour record is now added to the database for this volunteer.

You can customize the kinds of information that are collected as part of a service entry. To do this:

1. Choose [Setup \[pg:0887\]](#) from the menu.
2. Select *Service Tracking*.
3. Select *Ground Rules*.
4. Choose the kinds of information you want to collect for each service entry under *Manual volunteer service entries*. You may find [help topic 2325 \[pg:1429\]](#) useful because it shows examples of each option.
5. Click the **Save** button.

Your selection here will affect the way you - and all other [System Operators \[pg:0065\]](#) in your organization – make manual hour entries.

#### Related help

- [Help Topic 1016 \[pg:1557\]](#) - Service Measures
- [Help Topic 1017 \[pg:1406\]](#) - How to Setup a Service Measure
- [Help Topic 1021 \[pg:1559\]](#) - The Post Page
- [Help Topic 1045 \[pg:1909\]](#) - Tracking Groups
- [Help Topic 1153 \[pg:1565\]](#) - How to Efficiently Collect Volunteer Hours with Time Sheets
- [Help Topic 1162 \[pg:0034\]](#) - Service Values
- [Help Topic 1163 \[pg:1413\]](#) - How to Setup Service Values
- [Help Topic 1166 \[pg:1568\]](#) - How do service records get into Volgistics?
- [Help Topic 1198 \[pg:1673\]](#) - Using VicNet for groups
- [Help Topic 1204 \[pg:1460\]](#) - VicNet Time Sheet Tab
- [Help Topic 1208 \[pg:1415\]](#) - Auditing Service Entries
- [Help Topic 1212 \[pg:1759\]](#) - Using VicTouch for groups
- [Help Topic 2156 \[pg:1419\]](#) - Tracking Mandatory Service
- [Help Topic 2157 \[pg:1572\]](#) - How do I enter a volunteer's past hours?
- [Help Topic 2167 \[pg:1574\]](#) - How do I change an hour entry that's already been posted?
- [Help Topic 2168 \[pg:1575\]](#) - Posting Large Service Entries
- [Help Topic 2202 \[pg:1576\]](#) - How do I post hours from the schedule?
- [Help Topic 2275 \[pg:1424\]](#) - Tracking Volunteer Absences
- [Help Topic 2284 \[pg:0577\]](#) - How do I print a monthly volunteer hour report?
- [Help Topic 2285 \[pg:0579\]](#) - How do I print a monthly hour report by assignment?

- [Help Topic 2305 \[pg:1579\]](#) - How do I view a selected volunteer's hours?  
[Help Topic 2400 \[pg:1581\]](#) - Tracking Volunteer Service on the Service Tab  
[Help Topic 8257 \[pg:0560\]](#) - Service Detail Reports  
[Help Topic 8258 \[pg:0580\]](#) - Service Summary Reports
- 

## How to Make All Volunteers with No Recent Activity Inactive

Help topic 2031

Added or revised 05-10-2013

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If volunteers in your system do not have any recent activity, you may want to change their status to inactive. You can do this for all of the volunteers who have not had any recent service, at the same time. If, for instance, you want to change the volunteer status to 'Inactive' for any volunteer who has not had any hours recorded in the last 6 months, you can do this in three simple steps: Create a Set that finds these volunteers; tag their records; and then change the status on the tagged records to Inactive.

### Create the Set

Create a Set to find volunteers who have not had any service recorded recently.

1. Choose Sets from the [menu \[pg:0215\]](#).
2. Click the **Create a new Set** button.
3. Enter a name for the Set (e.g. No service in 6 months).
4. Under "Include volunteers in this set based on" choose 'Their Service' and then click the **Go** button.
5. Define your Set rule like this...

"Exactly 0:00 hours in the Last 6 months"

(or choose a different time frame to suit your needs).

6. Click the **Finished** button.

### Tag these volunteer records

Now you have a Set that includes all of the volunteers who do not have any service recorded recently.. Load the Set on the Volunteers page, and tag these volunteers like this:

1. Start by making sure there are not any tagged volunteer records already. To do this choose Tags from the [menu \[pg:0215\]](#) and then click the **Clear all tags** button. If the **Clear all tags** button is disabled it means there are not currently any tagged records. Continue with the next step in this case.
2. Choose Volunteers from the [menu \[pg:0215\]](#).
3. Under 'Include' choose the Set you created above from the Set drop-down list.
4. Also under 'Include' choose 'Active' from the Status drop-down list.

5. Click the **All** link at the top of the page (Next to the letter Z).

6. Now you should see a list of all active volunteers who have no hours recorded in the last 6 months (or the time frame you chose in your Set rule). You might spot check a few of these just to be sure these are the volunteers whose Status you want to change (click on a volunteer's name and view their Service tab to see when they last served).

5. Click the **Tag these** button at the bottom of the list to tag all of these records.

The active volunteers with no recent activity are now all tagged, and you're ready to change their status.

### **Change their status to Inactive**

To change the Status on the tagged records:

1. Choose Tags from the [menu \[pg:0215\]](#).

2. Next go to "Change the Status of all tagged volunteer records to:" select 'Inactive' and then click the **Go** button.

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Any time you use Tags, it is good practice to 'clear' the tags when you're finished with them. To clear the tags choose Tags from the [menu \[pg:0215\]](#) and then click the **Clear all tags** button.

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## **Entering Negative Service Values**

Help topic 2118

Added or revised 06-24-2004

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**Q.** I want to make service entry with a negative value to compensate for another entry that was made for too many hours. How do I do this?

**A.** Service entries cannot have a negative value. Rather than making one entry to fix another, edit the original incorrect entry so it contains the correct value. This keeps your service records more accurate.

### **Related help**

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## **How do I enter a volunteer's past hours?**

Help topic 2157

Added or revised 05-03-2013

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You may have volunteer service records going back a number of years that you want to enter into Volgistics.

While it's certainly possible for you to enter each of these old service records into Volgistics on a record-by-record basis, it's usually more practical to enter them as 'lump-sum' entries, especially if these old records are from past years for which service reports have already been completed.

You can make lump-sum entries several ways:

- A single entry for each volunteer (for whom you have old service records) with the sum of all of their previous hours. This is the easiest way to enter old hour information: However, you should recognize that making a single entry that covers more than one year or one assignment will mean that you won't be able to break-out the volunteer's old hour entries by year or assignment in Volgistics.

For example, if a volunteer served 2,345 hours between 1994 and the end of 2004 you would enter these values in the Volgistics service entry:

**From date:** 01-01-1994

**To date:** 12-31-2004

**Hours:** 2,345

- One entry for each year with the sum of the volunteer's service for that year. This involves more data entry, but gives you the ability to break-out the volunteer's past service by year in Volgistics.

For example, if a volunteer served 1,234 hours in 2003, you would enter these values in the Volgistics service entry:

**From date:** 01-01-2003

**To date:** 12-31-2003

**Hours:** 1,234

- One entry for each year and each different assignment the volunteer served in, with the sum of the volunteer's service for that year and assignment. This involves the most data entry, but gives you the ability to break-out the volunteer's past service by year as well as by assignment in Volgistics.

For example, if a volunteer served 89 hours in 2003, in an assignment called "Docent," you would enter these values in the Volgistics service entry:

**Assignment:** Docent

**From date:** 01-01-2003

**To date:** 12-31-2003

**Hours:** 89

You can enter these lump-sum service entries in Volgistics by adding new service entries on the Service tab in the volunteer's record, or by using the Post features.

To add new service entries for volunteers from within the volunteer's record:

1. Select Volunteers from the [menu \[pg:0215\]](#) and then locate a volunteer for whom you want to post a service entry.
2. Click this volunteer's Service tab.
3. If necessary, scroll down to the Service box and then locate the white "Add" box.
4. Enter the information for the volunteer's lump-sum service entry, and then click the **Save** button.

If you would like to make additional lump-sum entries for the same volunteer, simply locate the white "Add" box again and make the next entry.

If you're posting lump-sum service entries for many volunteers, and if the lump-sum entries you're making are all for the time period (e.g. 01-01-2003 to 12-31-2003), you can optionally use the Post feature to make data entry easier. Select "Post" from the [menu \[pg:0215\]](#) to access the Post feature.

If a single lump-sum entry is greater than 9,999 hours (or 9,999,999 for other service measures), you will need to [post the service in multiple entries \[pg:1575\]](#).

The volunteer's "Life hours" will increase with each new entry. Once you have entered all of a volunteer's old hour records, the "Life Hours" value for the volunteer in Volgistics will correctly show you the sum of all of the hours you've entered for the volunteer.

## Pre-1990 Hours

For efficient and fast database operations Volgistics has a lower and an upper limit on the dates that hour entries can have. The lower limit is January 1, 1990; and the upper limit is December 31st of the current calendar year. This means that hour entries for hours served in past years should have From Date that is not earlier than 01-01-1990. Help Topic [2281 \[pg:1577\]](#) includes more information.

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## How do I change an hour entry that's already been posted?

Help topic 2167

Added or revised 09-01-2011

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If you've made a service entry for a volunteer that you want to change, you can do so like this:

1. Choose Volunteers from the menu.
2. Locate the record for the volunteer whose service entry you want to modify.
3. Click on the Service tab for the selected volunteer.
4. Locate the "Service" box on the service tab. The service box includes a list of all of the service entries posted for the selected volunteer. Service entries for previous months and years initially appear on this list as a consolidated entry. You can click on any consolidated month or year entry to expand the list of service entries to include that month or year. Locate the entry you want to edit on this list. If the entry you want to edit is for a previous month or year, click on the appropriate month or year to see the detailed service entries for that period.
5. Click the Edit link that appears next to the service entry. This opens the selected service entry in the "Edit" box ([Don't have an Edit link? \[pg:1601\]](#)).
6. Make the necessary change to the service entry in the Edit box.
7. Click the Save button to save your changes.

Locate the entry you want to edit, and then click the Edit link for that entry

Date	Assignment	Hours		
10-07-2006	Transportation Driver [Sample Agency Name/Client Services]	5:00	<a href="#">Edit</a>	<a href="#">Delete</a>
10-01-2006	Transportation Driver [Sample Agency Name/Client Services]	3:00	<a href="#">Edit</a>	<a href="#">Delete</a>
<a href="#">Sep 2006</a>		15:26		
<a href="#">Aug 2006</a>		22:30		
<a href="#">Jul 2006</a>		12:45		
<a href="#">Jun 2006</a>		23:30		
<a href="#">Apr 2006</a>		31:00		
<a href="#">Feb 2006</a>		22:00		
<a href="#">2003</a>		451:30		
<a href="#">2002</a>		108:45		
<a href="#">2001</a>		501:45		
<a href="#">2000</a>		8:15		
<a href="#">1998</a>		5:00		
<a href="#">1997</a>		17:15		
<a href="#">1990</a>		541:00		
Life total:		1,768:41		

**Add**

Assignment:

Date:

Apply to:

Hours:

Edit the selected entry here

Click the Save button to save your changes

If you've posted too many hours on a certain service entry, don't try to adjust the mistake by making another service entry with a negative value. Instead, edit the service entry as described above so the entry contains the correct number of hours (Volgistics does not accept service entries with negative values).

#### Related help

[Help Topic 2305 \[pg:1579\]](#) - How do I view a selected volunteer's hours?

[Help Topic 2021 \[pg:1569\]](#) - How do I make a single hour entry manually?

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## Posting Large Service Entries

Help topic 2168

Added or revised 08-22-2005

---

The largest single service entry you can make in Volgistics is 9,999 for hour entries, and 9,999,999 for other kinds of service measures.



This does not mean that you cannot record more service than this in a volunteer's record: only that the largest single service entry in their record cannot exceed these values (there is no practical limit to amount of service you can record in an individual volunteer's record).

In nearly all cases the only time this upper limit might present an issue is when you're [posting past service for a volunteer \[pg:1572\]](#) to transfer their previous cumulative service records into Volgistics. In these cases, simply make multiple entries that will total the amount of service you want to post for the volunteer.

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## How do I post hours from the schedule?

Help topic 2202

Added or revised 09-30-2016

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If you track volunteer hours, and you schedule volunteers in advance using Volgistics, you can post volunteer hours directly from the schedule.

You would normally post hours from the schedule for dates which have already passed (since volunteers may not always serve as scheduled, it's best to post their service once a date has passed and you know which volunteers served).

To post volunteer hours from the schedule for a selected date:

1. Select "Post" from the [menu \[pg:0215\]](#).
2. Under "Post hours for..." select "Volunteers scheduled on this date" and then enter the date you want to post the hours for.
3. Click the **Continue** button. Volgistics will list each volunteer scheduled on the date you selected, along with their scheduled assignment and times.
  - For volunteers who served the times and assignment they were scheduled for, you do not need to change anything next to their name. Volgistics will calculate and post their hours automatically when you post the page.
  - For volunteers who served, but in an assignment other than the assignment they were scheduled for, simply change the assignment next to their name to the appropriate assignment.
  - For volunteers who served, but for times other than the times they were scheduled for, simply change the times next to their name to the actual times they served.
  - For volunteers who did not serve as scheduled, check the "Skip" checkbox across from their name. Volgistics will not post hours for these volunteers.
  - If you there is a group [scheduled to fill multiple openings slots \[pg:0753\]](#), you will see a listing for each opening slot the group is filling. There are two ways you can handle this.

One is to use each entry and set the Volunteers field to one (1). When this is done each entry will be shown on the [Service tab \[pg:1579\]](#) of the group record.

Another option is to tally the number of slots the group is filling and enter this number in the Volunteers field on one entry. Check the "Skip" box on the other entries so service is not posted for those entries. Please remember with this option that some entries for the group may appear on upcoming pages. Because there is not a way to return to a Post page after you have passed it, you may want to refer to the Schedule tab of the group's record to get the total number of opening slots the group is filling.

4. Click the **Post this page** button to post service for the first page of volunteers and then continue with the next page. Repeat until you reach the end of the list for the selected date.
5. If you'd like, you may print a Batch Report when you're finished by clicking the

### Print batch report

button (this button appears after you post the final page). Batch reports are helpful if you want to compare what you entered in Volgistics to a sign-in sheet in order to verify your entries. If you do discover that a mistake was made posting hours for a volunteer, you can easily [edit the individual hour entry \[pg:1574\]](#) that contains the mistake.

You can post some volunteer hours from a schedule, and still collect other hour entries through other methods. For example, if there are some assignments (such as assignments related to a special event) for which volunteers are scheduled through Volgistics, and other assignments where volunteers are not scheduled through Volgistics, you can use the Post feature to post the hours for the assignments that *were* scheduled and then use VicNet or VicTouch (or make manual hour entries) to record hours for the *other* Assignments.

### Related help

- [Help Topic 1021 \[pg:1559\]](#) - The Post page
- [Help Topic 1120 \[pg:0426\]](#) - Batch Report
- [Help Topic 1166 \[pg:1568\]](#) - How do service records get into Volgistics?
- [Help Topic 2313 \[pg:1581\]](#) - How to Delete a Batch of Posted Service
- [Help Topic 2400 \[pg:1581\]](#) - Tracking Volunteer Service on the Service Tab
- [Help Topic 8001 \[pg:0599\]](#) - Batch Report (stock)

---

## Why are hour entry dates sometimes changed when I post hours?

Help topic 2281

Added or revised 01-07-2013

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For efficient and fast database operations Volgistics has a lower and an upper limit on the dates that hour entries can have. The lower limit is always January 1, 1990; and the upper limit is always December 31st of the current calendar year.

You should not make hour entries for dates before or after this date range. If you're [catching-up Volgistics by posting old service records \[pg:1572\]](#) for volunteers, entries for time periods earlier than 1990 must be dated 1-1-1990 or later (the volunteers original 'start date' on their History tab can be any date, including dates before 1990).

In order to save all of the hour records you post for a volunteer, Volgistics will automatically adjust service entry dates that are out of range. If you make an hour entry for a date that is earlier than January 1, 1990, Volgistics will change the date on the entry to January 1, 1990. If you make an hour entry for a date that is later than December 31st of current year, Volgistics will change the date on the entry to December 31st of current year.

You can always [change the date on a service entry \[pg:1574\]](#) that has already been posted (to any date within the permitted range) if you'd like.

---

## Time Sheets

Help topic 2293

Added or revised 01-03-2012

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This help topic shows one option for creating time sheets in Volgistics. You may also be interested in the Daily sign-in sheets (stock) report. [Help topic 8047 \[pg:0666\]](#) has more information on this report.

If you don't use [VicTouch \[pg:1778\]](#) to collect volunteer hours, you can pre-print time-sheets using the 'Time sheet view' from your volunteer schedules. Time sheet views provide a list of the volunteers scheduled for duty on a selected date (overall, or for a selected Site, Place, Assignment, or Coordinator); with columns for volunteers to enter their actual time-in and time-out. Plus, there's an additional 'Office-use' column you can use to mark records as you post them for any other notation you might want to make.

The list can be printed in alphabetical or chronological order. The settings for this are under the "Time sheet view options" on the [Scheduling Ground Rules \[pg:1392\]](#) page.

Volunteers can use time sheets to sign-in and out when they arrive and depart, and you can use them when you [post hours from the schedule \[pg:1576\]](#) to confirm each volunteer's service.

Time Sheet						
Volunteer Schedule						
Sunday, September 10, 2006						
Volunteer	Time In	Time Out	Assignment	Scheduled Times		Office Use
Bailey, Mary			Tour Guide	10:00 a	12:00 p	
Dakin, Ruth			Info Desk	9:45 a	12:00 p	
Ross, Benjamin			Info Desk	9:30 a	2:00 p	
Yohn, Marcie			Docent	7:00 p	8:00 p	

To print time sheets from a schedule:

1. Choose Schedule from the [menu \[pg:0215\]](#).
2. If the schedule opens to the Calendar view, click the **Daily schedule** button.
3. Choose the date you want to print a time sheet for.
4. Click the 'Time sheet view' link near the top of the schedule. This opens a "printable" time sheet that should suit your needs. You can print this from your browser.

You can also view time sheets for an individual assignment, or for all of the assignments at a selected Site or Place; or for a selected Coordinator. To do this:

1. Open a Site, Place, Assignment, or Coordinator record.
2. Select the Schedule tab.

3. If the schedule opens to the Calendar view, click the **Daily schedule** button.
4. Choose the date you want to print a time sheet for.

---

## How do I view a selected volunteer's hours?

Help topic 2305

Added or revised 09-17-2013

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To see a selected volunteer's hours:

1. Select Volunteers from the [menu \[pg:0215\]](#).
2. Locate the volunteer's record.
3. Click the volunteer's name to open their record
4. Click the 'Service' tab.

The volunteer's hours are listed in the 'Service' box, on the Service tab as shown here:

**Service**

Date	Assignment	Hours		
10-07-2006	Transporation Driver [Sample Agency Name\Client Services]	5.00	Edit	Delete
10-01-2006	Transporation Driver [Sample Agency Name\Client Services]	3.00	Edit	Delete
<a href="#">Sep 2006</a>		15.26		
<a href="#">Aug 2006</a>		22.30		
<a href="#">Jul 2006</a>		12.45		
<a href="#">Jun 2006</a>		23.30		
<a href="#">Apr 2006</a>		31.00		
<a href="#">Feb 2006</a>		22.00		
<a href="#">2003</a>		451.30		
<a href="#">2002</a>		108.45		
<a href="#">2001</a>		501.45		
<a href="#">2000</a>		8.15		
<a href="#">1998</a>		5.00		
<a href="#">1997</a>		17.15		
<a href="#">1990</a>		541.00		
Life total:		1,768.41		

**Add**

Assignment:

Date:

Apply to:

Hours:

If the volunteer you've selected has service entries for prior months or years, these initially appear on the Service tab as a consolidated entry.

If you want to see the individual service entries for a prior year or month, simply click the link to that month or year. This will expand the consolidated entry so you can see the individual service entries for that month or year.

**Related help**

[Help Topic 2306 \[pg:0470\]](#) - How do I print hours for a selected volunteer?

[Help Topic 2167 \[pg:1574\]](#) - How do I change an hour entry that's already been posted?

[Help Topic 2021 \[pg:1569\]](#) - How do I make a single hour entry manually?

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## How to Delete a Batch of Posted Service

Help topic 2313

Added or revised 04-02-2015

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If you post volunteer service manually, the [Post page \[pg:1559\]](#) provides a fast way to enter service entries for multiple volunteers at the same time. Each time you finish posting, a batch record is created for all the service posted during the session. Each batch has a unique identification number and you can see a record of the service created for the batch by running a [Batch Report \[pg:0426\]](#).

There may be times an entire batch of service was entered incorrectly. For example, if the operator meant to enter all the service for April 1, 2015, but selected April 2, 2015 by mistake. In this case, one option is to go to each volunteer's record in the batch and [edit the service entry \[pg:1574\]](#). However, if there were a large number of records in the batch it may be quicker to delete the entire batch of service and then re-enter it. This option should only be used if you wish to delete *all* [service entries \[pg:1581\]](#) (or service records) for the entire batch.

To delete an entire batch of service, an [Administrator \[pg:0052\]](#) level [System Operator \[pg:0065\]](#) will need to follow these steps:

1. Select [Setup \[pg:0887\]](#) from the menu.
2. Expand the *Account management* link.
3. Select *Delete a batch*.
4. At this point a screen will appear warning you that the action of deleting the batch of service cannot be reversed and that it will delete *all* service entries for the batch. If you are sure this is what you wish to do, continue to step 5. Otherwise, click the **Cancel** button.
5. Enter the number for the batch you wish to delete in the field after *Delete all of the service records that were posted in batch number* and click the **Continue** button.
6. You can still opt to discontinue deleting the batch by clicking the **Cancel** button. If you wish to proceed, enter the password you use to login to Volgistics with in the *Password* field and click the **Continue** button.

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## Tracking Volunteer Service on the Service Tab

Help topic 2400

Added or revised 04-01-2015

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Each volunteer's service is tracked on the Service tab of the volunteer record. To get to a volunteer's Service tab, choose Volunteers from the [menu \[pg:0215\]](#), locate and click on the name of the volunteer of interest, and click on the Service tab in that volunteer's record. You will see that the Service tab contains three boxes: Assignments, Service and Mandatory Service. This help topic addresses only the second box, Service; help topic 2399 explains the [Assignments box \[pg:0138\]](#), and help topic 2156 explains how to [track mandatory service \[pg:1419\]](#) in Volgistics.

### Service Records

Most Volgistics users track the amount of service completed by their volunteers. There are [several ways to get service records into Volgistics \[pg:1568\]](#), including the use of the optional [VicTouch \[pg:1778\]](#) or [VicNet \[pg:1724\]](#) modules, the [Post page \[pg:1559\]](#), or by collecting hours from paper time sheets and then [manually](#)

posting hours [pg:1569] in individual volunteer records. No matter which way(s) you collect service information, it will end up as a service record in the Service box on the Service tab in the volunteer record. Note that service records are the source of data for all service reports in Volgistics, so it is important that they accurately represent your volunteers' service.

The image below shows an example of how a volunteer's Service box might look. Note that service completed in previous years is grouped together as a total entry for the entire year, and service completed in the current year is grouped together by month.

Service										
Expand all										
Date	Assignment	Apply to	To time	Hours	Merit hours	Absences	Animals Fed	Tours Given	Training Hours	Caregiver 1
<a href="#">Sep 2008</a>				5:00	5:00	0	0	0	0:00	0:00
<a href="#">2007</a>				12:00	13:00	0	0	0	0:00	0:00
<a href="#">2003</a>				462:30	462:30	0	0	0	0:00	0:00
<a href="#">2002</a>				110:45	110:45	0	0	0	0:00	0:00
<a href="#">2001</a>				326:30	326:30	0	0	0	0:00	0:00
<a href="#">2000</a>				12:30	12:30	0	0	0	0:00	0:00
<a href="#">1998</a>				5:00	5:00	0	0	0	0:00	0:00
<a href="#">1997</a>				30:25	30:25	0	0	0	0:00	0:00
<a href="#">1990</a>				492:00	492:00	0	0	0	0:00	0:00
Life total:				1,456:40	1,457:40	0	0	0	0:00	0:00

To expand a previous year's service information into the months during which service was recorded, click on the year in the Date column. To expand monthly service information into the individual service records that comprise a given month's total service, click on the month and year of interest in the Date column. To see each individual entry for all years listed at once, click on the orange "Expand all" link in the upper left corner of the Service box.

You can use the grid columns in the Service box on the Service tab to display [service measure \[pg:1557\]](#) information linked to individual service records. You can choose whether or not to display service measures as a grid column when you [set up the service measure \[pg:1406\]](#).

### Editing a Service Record

When the Service box is expanded to show individual service records, you will see an orange "Edit" link next to each entry. Click the Edit link to change any of the information that is part of a service record, or to see how a service record was entered or modified

**Edit**

Assignment: Records [Headquarters \ Volunteer Office] ▼

Date: 09-01-2008  From time: 8:00 am ▼

To time: 1:00 pm ▼

Apply to: None ▼

Hours: 5:00  Merit hours: 5:00

Absences: 0  Animals Fed: 0  Tours Given: 0

Calls Answered: 0  Meals Delivered: 0  Admission Received: \$0.00

Mileage: 0.00  Vacation: 0  Visits: 0

Group Hours: 0  Training Hours: 0:00

Source: This service record was entered as part of Batch number 32.

In the image above, one can see (in faint gray type at the bottom of the Edit box) the source of this service record. In this example, the service record was entered as part of a Batch, indicating the [Post \[pg:1559\]](#) feature was used. Use any of the fields in this box to adjust the service information pertaining to this record. Be sure to click the **Save** button when you are finished making any updates.

Note that while a service record tracks the service a volunteer has actually completed in an Assignment, an [Assignment record \[pg:0138\]](#) tracks a volunteer's relationship to a particular Assignment, which may or may not mean that a volunteer has completed service in that Assignment.



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## Session in use

Help topic 1006

Added or revised 02-19-13

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Each time an operator logs-in to Volgistics they start a new session. Sessions stay "open" or "active" until the operator clicks Exit on the Volgistics [menu \[pg:0215\]](#). For security purposes, Volgistics also closes sessions automatically when they are inactive for approximately 60 minutes. One way the system "senses" activity is when items are selected from the menu. So if you're doing something where you do not interact with the system (such as tagging a large number of records or writing a long email message), you may want to periodically select a different page from the menu.

If the **Session in use** message appears when you login, it means one of two things:

1. You were using Volgistics within the last 60 minutes and your Internet connection dropped, or you closed your browser without clicking Exit in Volgistics. In this case your earlier Volgistics session is still considered open. You can click the **Continue** button to close your earlier session and login again.
2. You share your Volgistics login name with another [System Operator \[pg:0065\]](#), and that person is currently using Volgistics. Because there can be only one session at a time for each operator in your Volgistics account, you cannot login until the session is closed for the other person using the shared login name. In this case, clicking the **Continue** button will allow you to login. However, it will also close the other person's session (they will receive a *Session expired* notice). Clicking the **Cancel** button will allow the other person to continue working.

An individual Volgistics operator can have only one session open at a time. However, your Volgistics account may have multiple operators and each of these may have a session open at the same time. You can upgrade your Volgistics account to provide additional operators if you would like more people to have access to the system at the same time. To add additional operators to your account, see [Help topic 2026 \[pg:1440\]](#) The number of system operators you are allowed to add is controlled by your account's [service level \[pg:0719\]](#).

### Related help

[Help Topic 1146 \[pg:1589\]](#) - Session Expired

[Help Topic 2075 \[pg:1600\]](#) - Using web browser Back buttons

[Help Topic 2297 \[pg:0220\]](#) - Logging In

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## Incorrect Time on the Who's Here Page

Help topic 1009

Added or revised 06-04-2012

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The [Who's Here \[pg:1772\]](#) page is used to monitor which volunteers are on-site in organizations where volunteers serve primarily at one or several fixed locations. In some instances, a System Operator might view the Who's Here page and find that the time displayed on the page is incorrect. This occurs when a System Operator's time zone setting is inaccurate.

To fix this problem, [set the appropriate time zone for each System Operator \[pg:1383\]](#). The change will take effect the next time the System Operator logs into Volgistics. Note that if you change the time zone setting for the System Operator you are logged in as, you must exit and login again to see the changed time zone setting.

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## Error messages

Help topic 1031

Added or revised 02-14-2012

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The following is a list of the error messages which could be reported by Volgistics and the conditions under which they would occur.

### **Error 301**

Irregular web request

Volgistics received a request from your computer, but the content of the request was incomplete, or too large to send.

If you receive this error when saving a Volgistics form with a very large text entry, the text entry may be too large. The maximum length of a text entry in a single Volgistics field is 4,600 characters. Check to be sure you are not attempting to save more than 4,600 characters in a single field.

If you continue to receive this error, please report it to the Volgistics Team in a help inquiry. Include the error number 301, and a description of what you are doing in Volgistics when you receive the error.

### **Error 305**

Irregular web request or expired session

Volgistics received a request from your computer, but the content of the request was incomplete or incorrectly formed.

This could happen if a web request was corrupted by a faulty network device.

This error could also occur if you bookmark a page within a secure part of Volgistics, and then later attempt to return to the bookmarked link. Secure pages cannot be bookmarked. To visit a particular page within the system later, you must login normally and then navigate to that page again. This ensures that only authorized system operators can return to secure pages.

### **Error 306**

Blocked

For security purposes your computer has been temporarily blocked. It has sent too many requests with incomplete or incorrectly formed data.

[Help topic 2163 "Security Blocks" \[pg:1604\]](#) explains more.

### **Session Expired**

This Volgistics session has expired. To continue working, click Exit and then login again.

Volgistics sessions expire after a certain period of inactivity (about 60 minutes). If you have a Volgistics session running on your computer and you do not use the system for 60 minutes or more, Volgistics automatically closes your session and automatically logs off.

Automatic log off is primarily a security provision. If you leave your computer unattended with Volgistics running, another person could potentially use your session to access the system (of course, it's always a good idea to close your Volgistics session by clicking Exit on the menu when if you're leaving your computer, especially if you are working from a computer accessible by others).

To start a new session and continue working, simply click Exit on the menu and then login again.

### **Invalid link or bookmark**

The link or bookmark you clicked is incomplete.

If you are attempting to add a link to the Volunteer Information Center from your web site when you receive this error, the link you've created does not contain your organization's *public* account number. [Help topic 2153 "Creating Links to VicNet" \[pg:1491\]](#) explains how to create these links using your *public* account number.

### **Page not found**

The link or bookmark you clicked is incomplete, or the page no longer exists on the web site.

The web page you were looking for was not found.

### **Internal Application Error**

#### **Catastrophic failure**

#### **Server error 500**

These errors would indicate a problem on the Volgistics system itself.

If you receive any of these error messages while using Volgistics, please contact the Volgistics Team for assistance:

When you contact the Volgistics team, please explain what you were doing in Volgistics when the error occurred, and the exact wording of the error message.

Normally such errors will not result in a loss of any previously saved information. Such errors may occur if the system encounters data which is outside of an expected range.

You should be able to continue working in other areas or on other records after such an error occurs. If the error occurs consistently in a particular location it may be necessary for the Volgistics Team to make an adjustment to the system.

### **Browser Errors**

You use Volgistics through a standard web browser. Web browsers can report error conditions as well, and these will generally relate to Internet connection or internal web browser problems.

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## Orange slider bar on menu does not move to menu selection

Help topic 1032

Added or revised 01-14-2004

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When you select an item from the Volgistics [menu \[pg:0215\]](#), the orange 'slider bar' normally moves to the menu item you selected. If you open Volgistics and then select a menu item before your web browser finishes loading the menu's graphic images, the orange slider bar may appear to remain 'stuck' on one menu item, although the menu will continue to function normally otherwise.

Once your browser has completed loading all of the menu's graphics the orange slider bar will move to selected item on subsequent menu clicks.

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## Configuring your organization's firewall for Volgistics

Help topic 1046

Added or revised 04-21-2015

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Some organizations use "firewalls" to protect their networks and computers. Often, organizations configure their firewalls to limit the web sites that network users are permitted to go to. If your organization uses a firewall for this purpose you (or the person who maintains the firewall) may need to make an adjustment that will permit you to reach the Volgistics web site.

This help topic includes technical instructions related to basic computer networking. Some of the trouble shooting commands in this help topic may require administrative access to your computer. If you do not have administrative access to your computer you should ask the person who maintains your computer for assistance.

If your firewall is configured to limit web access, be sure it permits network users to access this domain:

[www.volgistics.com](http://www.volgistics.com)

If you are using a software firewall, you may also need to permit access to these domains necessary to validate Volgistics' security certificates with DigiCert:

- <http://crl3.digicert.com/sha2-ev-server-g1.crl>
- <http://crl4.digicert.com/sha2-ev-server-g1.crl>

While it's best to configure firewall permission by domain name rather than IP address, this is the IP address and ports to which network traffic must be permitted:

69.87.157.201 port 80 (HTTP) and port 443 (HTTPS)

### Access tests

If you have experienced difficulty reaching the Volgistics web site from a computer running Microsoft Windows – or if you have experienced access issues from a computer running the VicTouch module, you should perform these tests to identify the cause of the problem.

1. Open a command window.

- a. Choose Start from the task bar.
- b. Choose Run.
- c. Enter "cmd" in the Run dialog box, and then click **OK**.

A command window like the one shown below will appear. You will perform the remaining tests at the command prompt in this window.

2. Flush the computer DNS (domain name system) cache. This will ensure that there are no "stale" DNS records on the computer itself. At the command prompt enter...

### **ipconfig /flushdns**

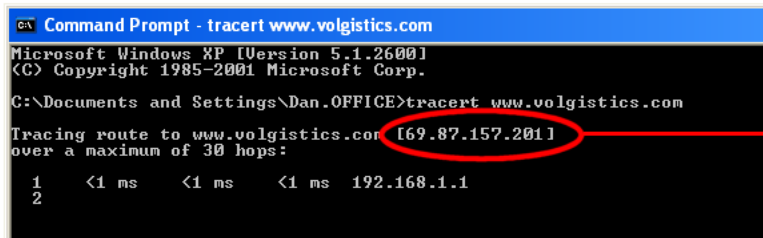
...then press the **ENTER** key.

3. Trace the route to www.volgistics.com. At the command prompt enter...

### **tracert www.volgistics.com**

...then press the **ENTER** key.

You should see the response "Tracing route to www.volgistics.com [ip address]" where the bracketed IP address is the one listed above. If the IP address in the brackets *is not* the one listed above, there is outdated DNS information on the network. Ask your network administrator or ISP to update cached DNS entries.



```
Command Prompt - tracert www.volgistics.com
Microsoft Windows XP [Version 5.1.2600]
(C) Copyright 1985-2001 Microsoft Corp.

C:\Documents and Settings\Dan.OFFICE>tracert www.volgistics.com

Tracing route to www.volgistics.com [69.87.157.201]
over a maximum of 30 hops:
  1  <1 ms  <1 ms  <1 ms  192.168.1.1
  2
```

The bracketed IP address shown here must be the one listed above

4. Test access to the IP address. At the command prompt enter...

### **tracert 69.87.157.201**

...then press the **ENTER** key.

The trace may take a minute or longer to complete. When complete, you should see one of the final "hops" listed as 69.87.150.226 or as 69.87.157.201. If the trace stops before either of the IP addresses is listed, there could be a firewall blocking the IP address on your network. Please check with your IT support staff for further assistance.

Note that you may receive a "Destination host unreachable" or a "Request timed out" message before either of the above IP addresses appear. This is normal. Some networks may not permit ICMP traffic for security purposes so the result of this trace test may not yield useful information.

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## Why can't I open Excel files from my Volgistics Mailbox?

Help topic 1109

Added or revised 08-08-2011

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Microsoft Office files in your Volgistics Mailbox will typically open automatically when you click on the name of the report. If you click on an Excel report and get a message that states the report is no longer available, you may have created a report that's larger than the Excel report limits allow. In this case, please see help topic 2169 "[My Excel Spread Sheet Report Gives Me an Error Message](#)" [[pg:0462](#)] for help separating the large report into smaller reports.

If you don't get an error message but the report does not open automatically, it is likely that your web browser needs to be configured to open Microsoft Office files with the appropriate Microsoft Office applications (or other compatible programs).

The browser settings must be changed so that there is an association between files ending in .XLS and the Excel program (or other compatible spreadsheet program) you run on the computer. (Look for an option with a name like "File Associations.") For assistance with procedure, please contact your organization's IT staff.

---

## Session Expired

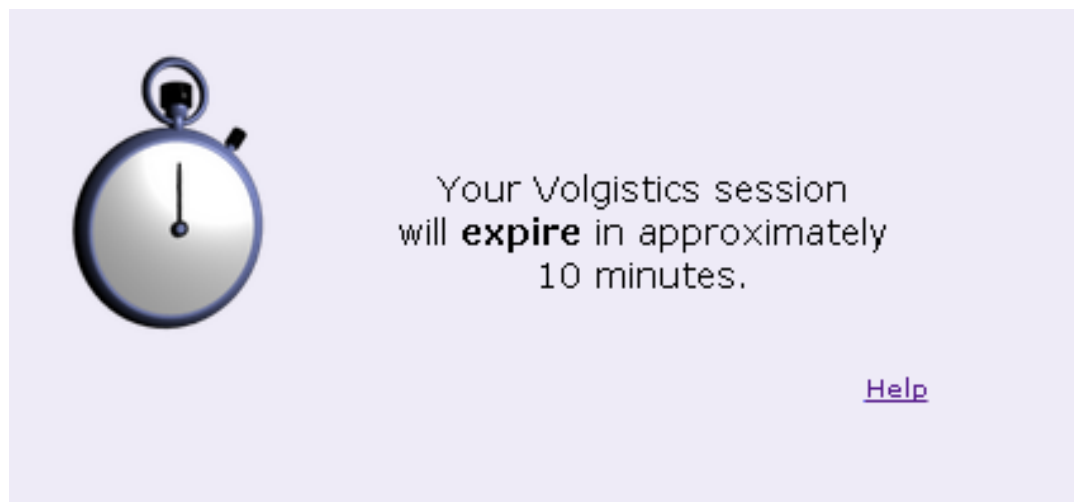
Help topic 1146

Added or revised 04-04-2016

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As a matter of basic system security, Volgistics sessions expire after a period of approximately 60 minutes of inactivity. Not all activities in Volgistics interact with the database so there are cases where you may be working, but the system will see you as inactive. For example, if you're composing a long email message or tagging a large group of volunteer records, the system will see you as inactive because the activity you're engaged in does not send any information to or from the database.

To protect you from accidental automatic sign-outs, a warning box similar to the one shown below will pop-up when you have approximately 10 minutes before the session expires:

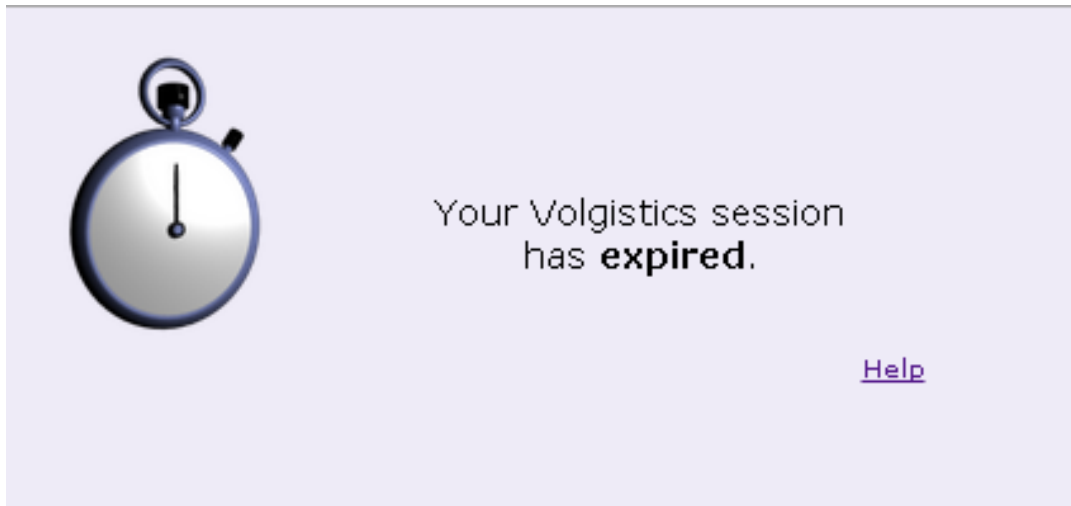


If you're still working with the database when you see the warning box, simply perform an action where you will send or pull information from the database. For example, if you are composing an email message, click the

### **Save to send later**

button. This will reset the timer and then you can re-open the message and begin working on it again. Or, if you are tagging volunteer records, select Schedule from the [menu \[pg:0215\]](#). This will make a call to the database which will reset the timer.

If the system still does not sense activity for the session after the 10 minute warning box appears, the session will be closed to protect the account's information. In this case, a warning box like the one shown below will appear:



The operator will also get a

### *Session Expired*

message when they try to perform an action that interacts with the database. If the session has expired, the user can continue working by selecting Exit from the [menu \[pg:0215\]](#), clicking [Login \[pg:0220\]](#) at the top of the page, and re-entering their credentials.

A *Session Expired* message can also appear if [System Operator \[pg:0065\]](#) login credentials are shared between two people and the second person logs in while the first person is already using the system. Because there can only be one session at a time for each operator, the second person cannot login until the session is closed for the other person using the shared login name.

In this case, the second person attempting to login will see a *Session in use [\_\_\_\_\_]* message. If this person clicks **Continue**, they will be able to login but the other person's session will be closed. This will cause the operator who was already logged in to see the *Session expired* notice. If the second person clicks **Cancel**, the person who was already logged in will be allowed to continue working.

### **Can I Prevent My Sessions From Expiring?**

The Volgistics feature that closes idle sessions after 60 minutes prevents open sessions from posing a security

vulnerability. It is a requirement of many security standards, and meets best practice standards for security.

*For this reason there is not a way to disable this feature or set an account to permit a longer period of session inactivity.*

If a System Operator knows they are going to be away from the system for more than a few minutes, we recommend they save the page they are working on before leaving to avoid losing any work.

You can optionally disable the alert messages warning that the session will be expiring on an operator-by-operator basis.

*However, this will not prevent the session from expiring. It will only prevent the alert messages from appearing.* You can find information on how to turn off the alert messages for an operator [here](#) [  ].

---

## Volgistics Seems Slow

Help topic 1168

Added or revised 01-29-2013

---

There are a number of variables that affect the speed at which Volgistics pages refresh in your web browser. The most significant is the speed of your Internet connection. For comparison purposes, here is an estimate of the amount of time required for your web browser to receive a list of 500 volunteers on the Volgistics Volunteers page at various connection speeds:

1.54 Mbps full T1, cable modem or DSL: 1 second

512 Kbps fractional T1: 3 seconds

128 Kbps ISDN: 12 seconds

56 Kbps dial-up: 29 seconds

As you can see, faster Internet connections dramatically improve performance. Volgistics recommends that you have a broadband connection (a connection faster than 56 Kbps dial-up) at the computers where you use Volgistics most often.

Keep in mind that if you share your Internet connection with other people, your actual bandwidth may be less than the overall speed of your connection. For example, if your office has a full T1 connection but it's shared among 20 computers on your network, the amount of bandwidth available to you will depend on what your co-workers are doing online at any given time.

Internet traffic between your computer and other computers on the Internet travels across many different networks, switches, and service providers. Occasionally bottlenecks along the way may reduce your connection speed further.

The Volgistics system can generally always process your requests for information very quickly (usually in milliseconds), although an additional factor affecting speed is the current workload at Volgistics. During peak periods – mid day for example – some activities like receiving a printed PDF report file may take a bit longer than at other times.

There are several web sites that can show your approximate connection speed. One of these is located at <http://www.speedtest.net>. Click the **BEGIN TEST** button to start the test.



For accuracy, perform the bandwidth test from your computer at a time when you notice slower performance and at a time when performance seems normal. If you submit an inquiry about slow response times, please let the Support Team know the results of your tests.

## Related help

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# VicTouch is Slow or Does Not Always Respond When Buttons Are Touched

Help topic 1169

Added or revised 05-13-2016

---

If VicTouch seems slow to respond when you touch a button, or if volunteers must sometimes touch a button more than once to get a response, you can perform these two simple tests to pin-point the problem:

### First test

If there is not a mouse attached to the VicTouch computer, attach a standard computer mouse. Using the mouse rather than the touch screen, check-in and out a few times using a known PIN number. Simply click once on the buttons using the mouse rather than touching the buttons on the touch screen surface.

If you find that VicTouch responds promptly to your mouse clicks and you do not need to click a button more than once, you most likely need to recalibrate or adjust the sensitivity of your touch screen monitor.

The touch screen monitor works by "watching" for touches to the surface of the monitor. When the monitor detects that it has been touched, it converts the location where the screen was touched into a standard mouse click (as if you used the mouse to click that spot on the screen), which it then passes on to VicTouch. If the touch screen monitor itself is not working properly, it may not always recognize that the surface of the monitor has been touched (a sensitivity issue), or it may not correctly see the location where the screen was touched (a calibration issue).

When you test VicTouch using a mouse rather than the touch screen monitor, you bypass the touch screen monitor hardware. If VicTouch responds as expected when you do this, it points to a sensitivity or calibration issue with the touch screen monitor itself rather than an issue with the VicTouch system.

Most touch screen monitors come with a software program or driver that you can use to set the monitor's sensitivity, and to re-calibrate the monitor (this is called positioning on some monitors). If you need help adjusting these hardware settings you should consult the documentation that came with your touch screen monitor or contact your IT department or the monitor manufacturer or vendor.

If you find that VicTouch still seems slow, or does not always respond when you click buttons using the mouse rather than the touch screen monitor, proceed to the second test.

### Second test

Open the web browser at the VicTouch computer and then visit [www.volgistics.com](http://www.volgistics.com). Login to Volgistics as you would normally (using your regular account number, login name, and password). Navigate around within Volgistics to see how it performs speed-wise. For example, look-up any volunteer record or view the Assignments page. When you do this, does Volgistics respond as quickly as you expect? In other words, is the system performance similar to what you're used to in Volgistics?

If the answer is yes, there is probably not a connection issue from this computer. Instead it is likely that Microsoft Internet Explorer has not been set up to 'cache' the VicTouch image files. In this case you should follow the instructions in [help topic 8270 \[pg:1523\]](#). In particular, be sure you've performed the steps under "Set Internet Explorer Advanced Options", including the steps to un-check 'Do not save encrypted pages to disk'. If these steps were not followed, VicTouch reloads the graphics on each session which can slow things down.

If the answer is No, (if Volgistics itself is slower here than at your usual computer) then this computer may have a slower internet connection than the computer where you usually use Volgistics. [Help topic 1168 \[pg:1591\]](#) explains how to test your connection speed. Volgistics recommends that your VicTouch computer connects to the internet through a broadband connection.

## Related help

---

# The Buttons Are Too Small or Too Large at VicTouch

Help topic 1170

Added or revised 04-03-2008

---

If the buttons volunteers use to navigate through VicTouch appear too small or too large, you can adjust their size by changing the screen resolution on the VicTouch computer.

Follow these steps to adjust the VicTouch computer screen resolution (note that you may need to be logged into Windows as an "administrator" to make this change – contact the person who supports your computer for assistance if this is the case).

1. Minimize or [shut-down VicTouch \[pg:1762\]](#).
2. Click on the Start button, and select Settings and then Control Panel.
3. From the Control Panel, select Display to open the Display Properties screen.
4. Click on the Settings Tab.
5. Move the slider to a screen resolution that is no smaller than 1024 by 768 pixels, and no larger than 1280 x 1024. The smaller the resolution the larger the VicTouch buttons will appear.
6. Set the Color quality as high as your display adapter will support (at least 256 colors recommended).
7. Click Apply, and then click OK.

---

## Error 12152

Help topic 1201

Added or revised 12-08-2008

---

The error message 12152 comes from the Windows Internet (WinINet) application programming interface (API) and describes HTTP protocol status:

```
12152 ERROR_HTTP_INVALID_SERVER_RESPONSE
The server response could not be parsed.
```

The 12152 error is a non-specific error message which indicates a connectivity issue that prevents the web browser from being able to communicate with the Volgistics system.

Most of the time this problem is caused by

- Network connection instability
- Server maintenance at Volgistics
- Internal Windows issues
- Firewalls, routers, pop-up blockers

Try accessing Volgistics from a different computer or network. If you can connect from a different computer or network the problem is more likely on the computer where the error occurs. If you get the same error from a different computer or network, the Volgistics system may be under server maintenance. Except for emergency maintenance, all server maintenance is announced in advance on the Volgistics Welcome page.

These are some tips how to improve the quality of your internet connection:

1. On the computer that is receiving the 12152 error, test your internet connection outside of Volgistics (can you go to other web sites okay?)

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## Error Message About the Volgistics Security Certificates

Help topic 1309

Added or revised 05-13-2016

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Security certificates (SSL certificates) provide a way for Internet users to be sure the web site they're using is owned by the company it claims to represent. Volgistics uses DigiCert to provide its security certificates. The Volgistics security certificates are valid and up-to-date. However, sometimes users report that they get an error message regarding security certificates when they use Volgistics. While there are many different scenarios that could cause this, in the majority of cases the error messages our users get can be tracked to two different causes. If you have an IT or IS department at your organization, this department may need to check whether one of these, or something else, is causing the error messages. If you do not have an IT or IS department, you will need to check on these yourself. One problem we sometimes see is there is an anti-virus program, firewall, or other network setting that is blocking access to the URL addresses necessary to validate the security certificates for Volgistics. There should always be an exception in place for the www.volgistics.com domain. However, you may also need exceptions for the following URL addresses:

- <http://crl3.digicert.com/sha2-ev-server-g1.crl>
- <http://crl4.digicert.com/sha2-ev-server-g1.crl>

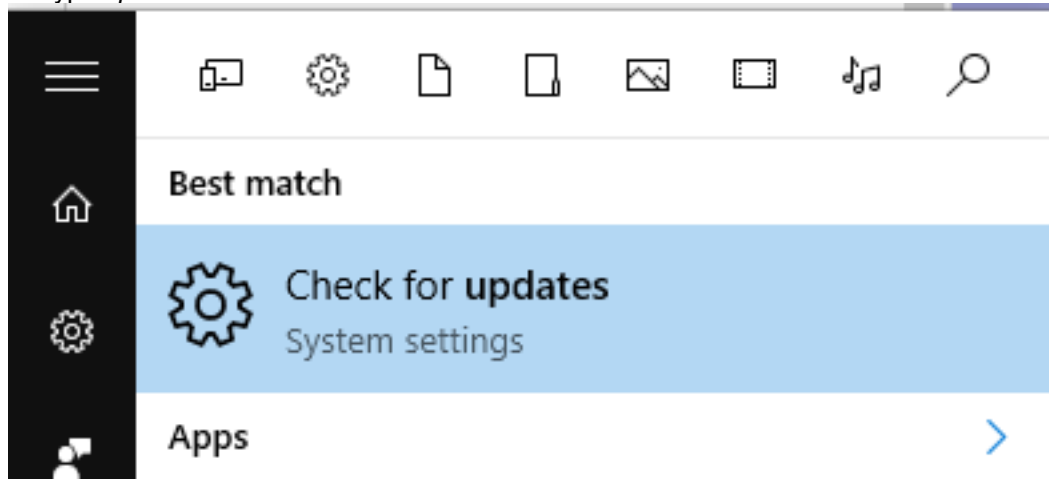
The second, and most common, problem we see is the root certificates for the Windows operating system need to be updated. Because certificates operate in a chain, a problem with the root (or base) certificates can cause all certificates up the line to appear invalid even though they are not. The process to update the root certificates varies depending on the version of Windows you are running. So when in doubt you should consult the help documentation for Windows. However, here are some steps for some common Windows platforms:

### **Windows Vista and Windows 7**

1. Click on the Windows Start menu.
2. Select "All Programs."
3. Select "Windows Update."
4. Select "Check for updates" from the menu on the left.
5. Select the optional updates link from the right side.
6. Check the box in front of "Update for Root Certificates for Windows . . . ." If this option does not appear, your root certificates are current and do not need updating.
7. Click the **OK** button in the bottom right corner.
8. Click the **Install updates** button.

## Windows 10

1. Click on the Windows Start menu.
2. Type *updates*



3. Click "Check for updates".
4. If you see a button to **Check for updates**, click it. If updates are currently available, you should have an option to install them. If updates have already been applied, you may see a message indicating the a restart has been scheduled. In this case, you'll need to restart the computer before the updates will take effect.

### Related help

[Help Topic 1046 \[pg:1587\]](#) - Configuring your organization's firewall for Volgistics

[Help Topic 2290 \[pg:1619\]](#) - Internet Connection Problem at VicTouch

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## "Email me a copy" and "Text me a copy" buttons on the VicTouch sched

Help topic 2008

Added or revised 04-24-2014

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If you use the [VicTouch \[pg:1778\]](#) module, and you have [enabled the schedule page \[pg:1453\]](#), volunteers can click the *Email me a copy* or the *Text me a copy* button on the schedule to have a copy of the month's schedule sent to them. Here is how to set up this feature:

1. Select [Setup \[pg:0887\]](#) from the menu.
2. Expand the VicTouch link.
3. Select *Schedule "Email/Text me a copy" messages*.
4. Check the box in front of *Use the "Email me a copy" and "Text me a copy" buttons for schedules in VicTouch*.
5. Enter and/or edit the text boxes for the email messages if you'd like. *There is not a way to customize the content of text messages due to the limited number of characters permitted.*
6. Click the **Save** button.

If the buttons do not appear for a volunteer when he or she views the schedule, one or more of the following may apply:

- The *Use the "Email me a copy" and "Text me a copy" buttons for schedules in VicTouch* is not checked. In this case, follow the steps above and be sure to check the box in step 4.
- For email, the volunteer does not have an email address entered on the [Core tab \[pg:1868\]](#) of their record. For text messages, the volunteer has not [opted-in to text messaging \[pg:0323\]](#)
- The volunteer's [email address is invalid \[pg:0377\]](#) or their [text number is invalid \[pg:0333\]](#).
- The volunteer has the "No email" or the "No text message" box checked on the [Core tab \[pg:1868\]](#) of their record.
- The volunteer is not scheduled in the month that is selected.

---

## Why do some fields in Volgistics appear to be highlighted?

Help topic 2033

Added or revised 11-25-2014

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If you find that some of the fields in your Volgistics system have been shaded yellow or another color, you probably have a browser add-on (such as the Google Toolbar) that provides an *auto-fill* feature. This type of browser add-on creates colored fields to indicate that the browser can fill in the field with your name, email address, phone numbers, passwords, etc. These auto-fill add-ons are designed to help you enter your own information into web forms so it does not need to be typed.

These fields are **not** shaded this color by Volgistics. You can prevent these fields from being shaded by disabling the auto-fill feature in your browser add-on. For example, if you are using Google Toolbar, you can turn off the auto-fill feature like this:

1. Choose settings from the Google tool bar.
2. Select *Options*.
3. On the *Features* tab, uncheck *AutoFill*.

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## Access Not Permitted from This Computer

Help topic 2053

Added or revised 02-11-2008

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Your organization can setup Volgistics [system operators \[pg:0065\]](#) who are permitted to access the system only from certain computers.

If you see the message *Access not permitted from this computer* when you attempt to login to Volgistics it means your system operator profile includes this limitation and you are attempting to login from a computer that is not one of the computers from which you are permitted to access the system.

Specifically, this means that the public IP address used by the computer is neither of the two permitted IP addresses specified in your system operator profile. The Internet IP address currently being used by your computer is displayed as part of this message.

You will not be able to login until you are at one of the computers from which access is permitted, or your organization's [Volgistics Administrator \[pg:0052\]](#) modifies or removes this restriction.

Contact your organization's Volgistics Administrator for further assistance with this restriction. The Volgistics Team cannot remove this restriction from your system operator profile. This restriction may be removed or modified only by one of your organization's Volgistics Administrators. Your organization's Volgistics Administrator(s) can access the system from any computer.

To manage this restriction Volgistics Administrators may:

1. Choose Setup from the [menu \[pg:0215\]](#).
2. Select System Operators
3. Click on your system operator name.
4. Examine or modify the setting for "Computers." The "permitted IP address" fields show which IP addresses the selected system operator may login from. [Help topic 1011 \[pg:1433\]](#) "System operator page" explains how to configure this setting.

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## Clear Your Account Number or Login Name from the Secure Login Page

Help topic 2056

Added or revised 05-13-2016

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If you previously set your web browser to remember your account number and login name for the secure Login page, your account number and login name are automatically entered for you each time you login.

There may be times when you no longer wish to have your account number and login name appear here automatically, or you might want to change the account number or login name that your web browser enters automatically (for example, if you have changed your login name and your browser remembers your old login name).

There are two ways to clear [cookies \[pg:1615\]](#) in Volgistics. If you have access to Setup in Volgistics, you can clear just the cookies from 'volgistics.com.' If you do not have access to Setup, you can simply clear cookies from all sites.

To clear only the Volgistics login credentials previously saved on *this* computer:

1. Choose Setup from the menu.
2. Click on Account management.
3. Click on Cookies.
4. In the Clear section, click the **Clear** button.

To clear all cookies from your web browser:

### Internet Explorer

To clear cookies from Microsoft Internet Explorer:

1. Click the gear icon in the top right corner, and then select Internet Options.
2. Under Browsing History click the **Delete** button.
3. Check "Cookies and website data", and optionally choose whichever other items you'd like to delete.
4. Click the **Delete** button.

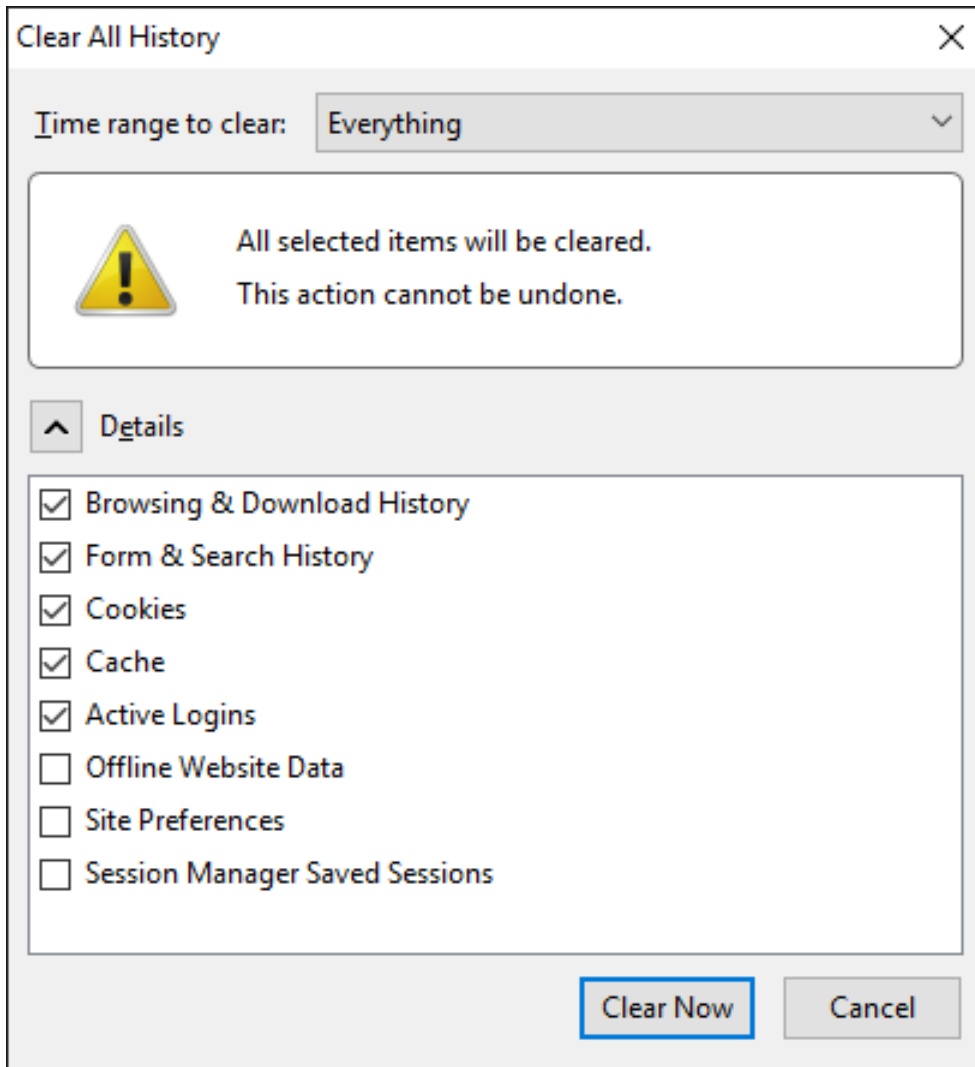


5. When Internet Explorer is finished deleting the files, a message will appear at the bottom of the page.

## **Firefox**

To clear cookies in Mozilla Firefox:

1. Click the menu icon in the top right corner.
2. Select the 'Options' Icon.
3. Choose "Privacy" from the menu on the left side.
4. Under "History" choose to "clear your recent history".
5. Next to "Time range to clear" select "Everything". Then check "Cookies" along with any other information you'd like to clear



6. Click the **Clear Now** button.

## Safari

To clear cookies in Safari:

1. Select 'Clear History..' from the Safari menu.
2. Select "all history" from the dropdown list.
3. Click the **Clear History** button.

The next time you login, your web browser will not automatically complete the Account number and Login name fields on the Secure login page. If you've changed your login name and you want your browser to remember your new login name, enter your account number, your new login name, and your password on the Secure login page, check "Remember my login credentials at this computer" and then click the **Login** button.

## Related help



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## Using web browser Back buttons

Help topic 2075

Added or revised 02-12-2013

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To aid in web site navigation, most web browsers store a copy of the web pages you visited recently. A **back** button in the browser lets you back-up to the copies of pages you visited previously.

The web browser's **back** and **next** buttons work well with web sites that provide information that changes infrequently, such as news and shopping web sites. At these kinds of sites, clicking the **back** button will generally take you back sequentially to a copy of each web page you viewed most recently.

In the case of the Volgistics web site, many of the web pages you view contain information that could change from one moment to the next. When you visit such a web page in Volgistics, your web browser will *not* save a copy of that web page. This means that you cannot use your web browser's **back** button to return to a copy of that page. Instead, clicking the browser's **back** button may result in an error message.

While this might seem like it's just a nuisance, this procedure actually protects you from seeing information that may now be outdated, and prevents you from inadvertently saving outdated information from a copy of a web page.

**As a general rule, it's best to avoid using your web browser's**

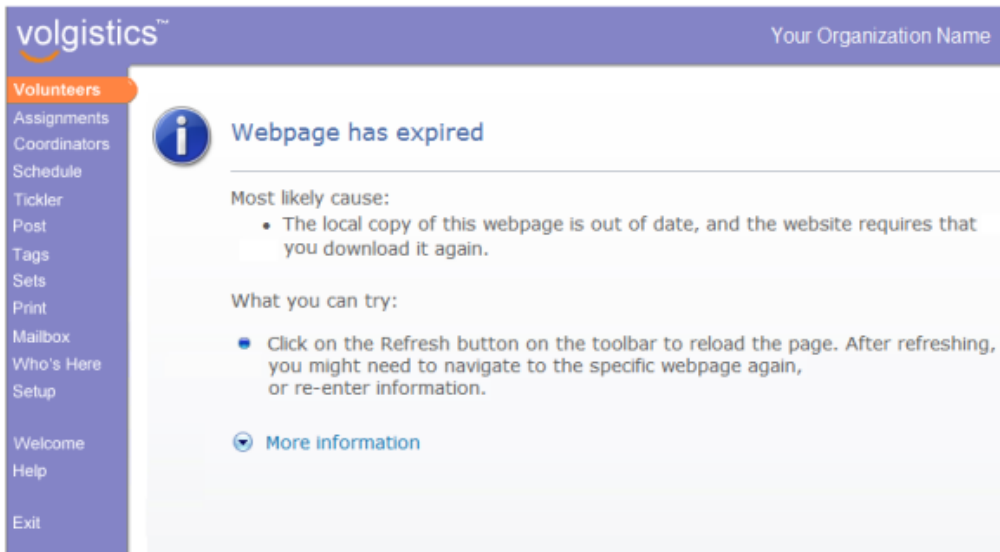
back

**and**

next

**button to navigate while you're using Volgistics. Instead, use the navigation controls that Volgistics provides within the system. For example, use the [Volgistics menu \[pg:0215\]](#) to move from one area of the system to next.**

If you use your web browser's **back** button to return to a web page for which your browser did not store a copy, you may see a message similar to this:



If this happens, simply use the [Volgistics menu \[pg:0215\]](#) to continue navigating. For example, you can choose Volunteers from the menu if you're looking for a volunteer's record.

If you use your web browser's

### back

button to backup past the point where you logged into Volgistics, you'll need to login again. In this case simply enter [www.volgistics.com](#) in your web browser and select [Login \[pg:0220\]](#) from the menu at the top of the page to login.

### ***Webpage expired is not the same as Session expired***

If your web browser tells you a web page you've "backed-up" to has expired, it does not necessarily mean that your [Volgistics session \[pg:1589\]](#) has expired. If you still see the Volgistics menu on the page, you can continue working in your Volgistics session by simply choosing any option from the [Volgistics menu \[pg:0215\]](#).

### **Related help**

[Help Topic 1006 \[\\_\\_\\_\\_\\_\]](#) - Session in use

[Help topic 1146 \[pg:1589\]](#) - Session Expired

[Help Topic 2297 \[pg:0220\]](#) - Logging In

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## **Edit Button Does Not Appear on Service Entries**

Help topic 2117

Added or revised 06-24-2004

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**Q.** I need to view or change an existing service entry; however there is no Edit button next to the entry. Why don't I see the Edit button?

**A.** Service entries normally include an Edit button you click to edit or view that entry, as shown here:

Date	Assignment	Hours		
06-24-2004	Information Desk	4:00	Edit	Delete

There are two circumstances in which this Edit button does not appear.

First, the Edit button does not appear for consolidated service records. Volgistics automatically consolidates service records for prior months and years. Since these consolidated records may represent many individual entries, they do not include an Edit button themselves. To expand a consolidated service entry for a selected month or year click on the Month or Year link, as shown here:

Date	Assignment	Hours		
06-24-2004	Information Desk	4:00	Edit	Delete
<a href="#">2003</a>		215:00		

Once you expand the consolidated entries for a selected month you'll see the individual service records for that month. These individual records normally include the Edit button.

Second, system operator rights may be set to prevent some system operators from changing existing service entries. The edit button will never appear on individual service entries for operators with this restriction.

If you are a Volgistics Administrator, you can set or remove this system operator restriction like this:

1. Choose 'Setup' from then [menu \[pg:0215\]](#).
2. Click 'System operators.'
3. Click on the name of the system operator in question.
4. Check or uncheck "Change or delete existing service records" as appropriate.

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## What To Do if a Volunteer or Coordinator Reports That They Can't Login

Help topic 2162

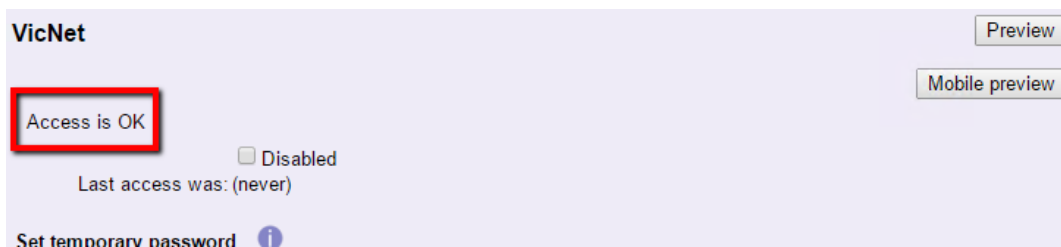
Added or revised 03-23-2017

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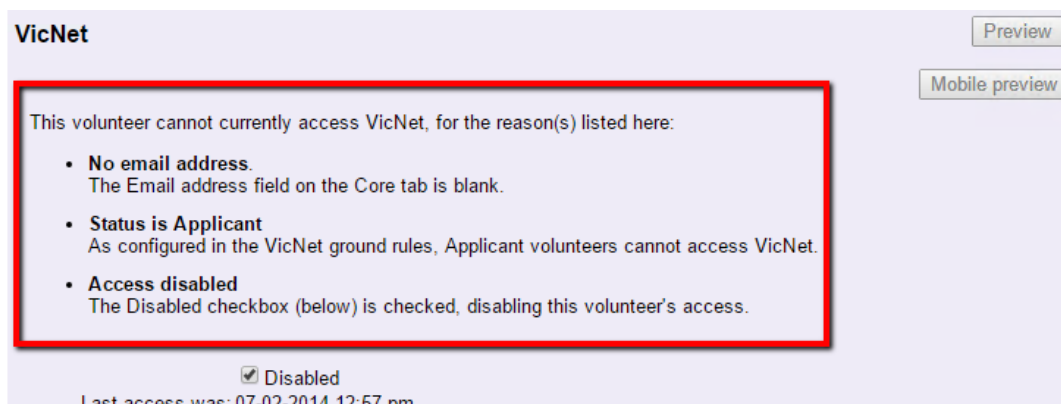
Follow the steps in this help topic if a volunteer or [Coordinator \[pg:0163\]](#) reports that they are unable to login to [VicNet \[pg:1724\]](#) or [VicTouch \[pg:1778\]](#).

If a volunteer or Coordinator reports a problem accessing **VicNet**

1. Choose Volunteers (or Coordinators) from the [menu \[pg:0215\]](#), and then locate the volunteer's (or Coordinator's) record.
2. Select the [Vic tab \[pg:1810\]](#).
3. Look at the VicNet box for the volunteer's or Coordinator's current access status to this module. If this box states *Access is OK*, jump to step 4.



If a volunteer or Coordinator does not have access to VicNet, the box will state *This volunteer (or Coordinator) cannot currently access VicNet, for the reason(s) listed here*. Beneath this statement there will be a list of reasons such as a blank Email address field or the *Disabled* checkbox is checked.



Use the reasons provided in the VicNet box to determine what needs to be done to assist your volunteer or Coordinator in gaining access to this module (for example, change their volunteer [Status \[pg:1832\]](#) to one that is [allowed to have access \[pg:1707\]](#)).

4. If the Access box shows *Access is OK*, click the **Preview** button. You should be able to preview VicNet for the volunteer's record. If you can, it means that the volunteer or Coordinator will be able to login as long as they enter the correct email address and password.

Complete these additional steps if *you* can preview VicNet from the volunteer or Coordinator's record, but the volunteer or Coordinator reports they cannot access the system:

**a.**

Be sure the volunteer or Coordinator is visiting your organization's VicNet login page to login to VicNet and

*not*

the Volgistics.com Login page

*you*

use to access Volgistics. Volunteers access VicNet through a VicNet login page you link to on your own web site as explained in [help topic 2153 \[pg:1491\]](#) "Creating Links to VicNet." They do not login to VicNet on the Volgistics.com login page as you do. If the volunteer is attempting to login through the same Volgistics.com Login page you use to access the system, they will not be able to login. They must visit your organization's VicNet login

page instead.

**b.** Confirm that the email address that appears in the Email address field on the **Core tab** [pg:1868] in the volunteer's record, or the Coordinator tab of the Coordinator's record, is entered correctly. Also check that this is the email address that the volunteer or Coordinator uses when they login to VicNet.

**c.**

If none of the ideas outlined above allow the volunteer or Coordinator to access VicNet, then the most likely problem is with the password being used. In this case, we recommend having the volunteer or Coordinator follow the steps shown in **help topic 1307** [pg:1975]. This will work even if a password has never been assigned for the record.

You can learn more about volunteer and Coordinator passwords in **help topic 1305** [pg:1699].

#### If a volunteer reports a problem accessing **VicTouch**

1. Choose Volunteers from the **menu** [pg:0215], and then locate the volunteer's record.
2. Select the Vic tab.

Like the VicNet box, the VicTouch box will indicate

*Access is OK*

or

*This volunteer cannot currently access VicTouch...*

Again, if a volunteer is not able to access the system, the reason(s) will be listed. One reason why a volunteer would not be permitted to access VicTouch is if the **VicTouch ground rules page** [pg:1511] was configured not to allow volunteers of their Status to use VicTouch. Use the reasons provided in the VicTouch box to determine what steps you should take to give your volunteer access to this module.

3. The VicTouch box also shows the volunteer's PIN number. If a volunteer is not able to log into VicTouch, confirm that they are attempting to sign-in with the PIN number listed here.

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## **Security Blocks**

Help topic 2163

Added or revised 05-28-2014

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Volgistics carefully safeguards access to your account. One way Volgistics does this is by blocking computers that appear to be attempting to guess an account's credentials.

When Volgistics sees a computer making a series of attempts to access an account using invalid login names and passwords, it automatically stops accepting login attempts from that computer. This helps prevent unauthorized individuals from accessing an account by trying different login names and passwords over and over again until a valid login name and password are discovered.

Unfortunately, this important security provision may occasionally block a legitimate [System Operator \[pg:0065\]](#) who has entered their account number, login name, or password incorrectly too many times in sequence. For example, when a legitimate operator has forgotten their password, and tries a series of possible (but incorrect) passwords over and over again.

To access the system if this has happened to you:

1. If it is not cleared by your organization, this block will automatically clear itself after a certain period.
2. Try accessing your account from a different Internet connection, or a different computer or device such as a smart phone. Because security blocks are specific to IP addresses, this will bypass the block that was put in place.
3. If your organization's [Volgistics Administrator \[pg:0052\]](#) (or another operator who has access to [Setup \[pg:0887\]](#) on the menu) is already signed-in (or can access the system through step 2), they can clear the block by selecting Setup, Account Management, and then Remove Block.

This security mechanism takes more than a few invalid login attempts to be triggered. If Volgistics tells you that you have entered an invalid login name or password, pause to verify that the account number and email address you're using are correct. If you may have forgotten your password, click the [Forget your password? \[pg:0044\]](#) link to reset your password by email before making repeated attempts to guess your password.

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## Why don't I see the "Archive" button?

Help topic 2175

Added or revised 10-05-2016

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When you visit the record for a volunteer whose record you want to archive, the **Archive** button may not be visible or it may be disabled. Or, after you [tag \[pg:1529\]](#) one or more volunteer records, the option to archive the tagged volunteer records may be disabled on the Tags page.

There are two reasons this can happen:

- If your Volgistics system operator rights do not include the ability to delete or archive volunteer records, you will not see the **Delete** or the **Archive** button when you open a volunteer record or use the Tags page.
- If you are out of room for archived volunteer records based on your account's [service level \[pg:0719\]](#), the **Archive** button will be disabled when you open a volunteer record, and you cannot archive tagged volunteer records.

If you have access to the [Setup \[pg:0887\]](#) area, you can determine how many archived volunteer records you have space for like this:

1. Choose Setup from the [menu \[pg:0215\]](#).
2. Select "Account Management."
3. Select "Account Status." The Account Status page shows the number of archived records you have in your account, and the maximum number of archived records you can store at your current service level.

If you need more space for archived volunteer records you can [increase your account's service level \[pg:0731\]](#).

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## Problems opening PDF files

Help topic 2176

Added or revised 05-13-2016

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You use [Adobe Reader \[pg:0449\]](#) to view and print reports you create in Volgistics as PDF files. Adobe Reader comes pre-installed on most computers, and most web browsers will automatically use Adobe Reader to show you PDF file content, including Volgistics reports you create as PDF files. This help topic addresses some common issues you may experience when opening these files.

Since problems opening PDF files in Adobe Reader are almost always related to settings on a specific computer, starting Volgistics at a different computer and opening the report from there will usually work as a temporary solution.

Also, some issues can be resolved by upgrading to the latest version of Adobe Reader. You can download Adobe Reader from the Adobe web site by clicking the 'Get Adobe Reader' link below.

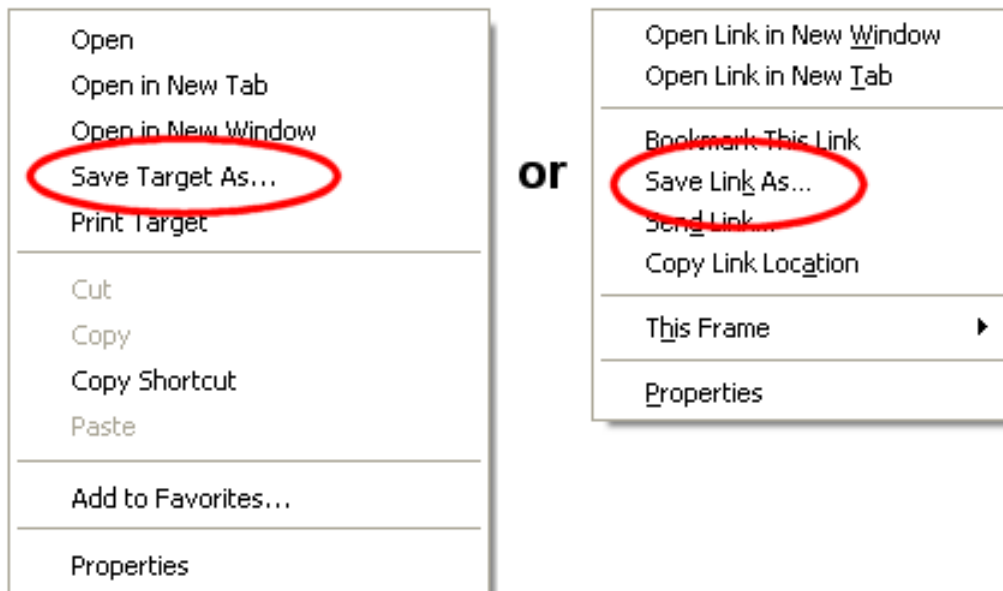


If downloading and installing the latest copy of Adobe Reader does not help, here are some other things to try.

### **Saving PDF files to your computer before you open them**

Certain computer configuration issues could prevent Adobe Reader from opening a PDF file directly from your Volgistics Mailbox. In these situations you can save the report file to your own computer and then open it with Adobe Reader (until the underlying configuration problem is resolved).

1. From the Volgistics Mailbox [In Box tab \[pg:0303\]](#), right-click on the Subject name for the report you want to open, and then choose "Save target as..." (or "Save link as").



2. Use the "Save As" window to choose a location on your computer to save the PDF file. For example the "Desktop."

3. Once the download is complete, click the Open button, or locate the file on your computer and then double click on the file name.

4. If you're asked what program you want to use to open the file, choose "Select the program from a list," and then select Adobe Reader from the list of available programs (Adobe Reader must already be installed on your computer).

### **There was an error opening this document. Document cannot be found**

Adobe Reader may give the message *There was an error opening this document. Document cannot be found* when you click on a PDF report in your Volgistics Mailbox.

#### Quick solutions

A quick solution to this problem is to save a copy of the report file to your computer (follow the instructions above); start Adobe Reader; and then open the saved copy of the file from the File menu in Adobe Reader.

Clearing your browser's cache or temporary Internet files may solve the problem.

Updating the web browser and/or Adobe Reader may also solve the problem.

#### Causes

When you click on a link to a Volgistics report that you formatted as a PDF file, Volgistics returns the PDF file to your computer and tells your computer that the data being returned is a PDF file (technically, Volgistics sets content-type to "application/pdf" and the content-length to the size of the file). Your web browser saves the data in a temporary file on your computer, and then passes the name of the temporary file to Adobe Reader to open for you to view.

If Adobe Reader gives the error *There was an error opening this document. Document cannot be found*, it usually means that the web browser could not create the temporary file on your computer; or that Adobe Reader could not access it.



There are a number of possible conditions on your computer that could cause this error. Referring this problem to the person responsible for supporting your computer may be required. Causes may include:

- The %TEMP% folder (the folder referenced by the Windows environment variable %TEMP% for the current user) may have a size limitation smaller than the size of the PDF file you want to open.
- Adobe Reader may have inadequate permissions to the %TEMP% folder.
- Adobe Reader and the web browser may have been launched under different user accounts.

### **Adobe Reader does not open automatically when I click on a PDF report file in my Volgistics Mailbox**

If you use Microsoft Windows, the operating system may not be configured to associate web content formatted as a PDF file with Adobe Reader. Step-by-step instructions on how to associate PDF file content with Adobe Reader (so Adobe Reader will open automatically when you click a link to a PDF file in Internet Explorer) are available from Microsoft at: <http://support.microsoft.com/kb/307859>

Under certain circumstances there are additional technical issues with Adobe Reader when you configure Adobe Reader to open PDF files *within* Internet Explorer. In these circumstances, PDF files may not open properly, or they may be garbled when opened.

The specific circumstances that cause this problem and their solutions vary with Internet Explorer and Adobe Reader product versions. Use the Adobe web site for technical support with this issue.

### **Firefox will not open PDF documents from the Volgistics Mailbox**

If you use the Firefox web browser, Firefox may stop loading PDF files from your Volgistics Mailbox and display this "Stopped" message in the web browser's status bar:

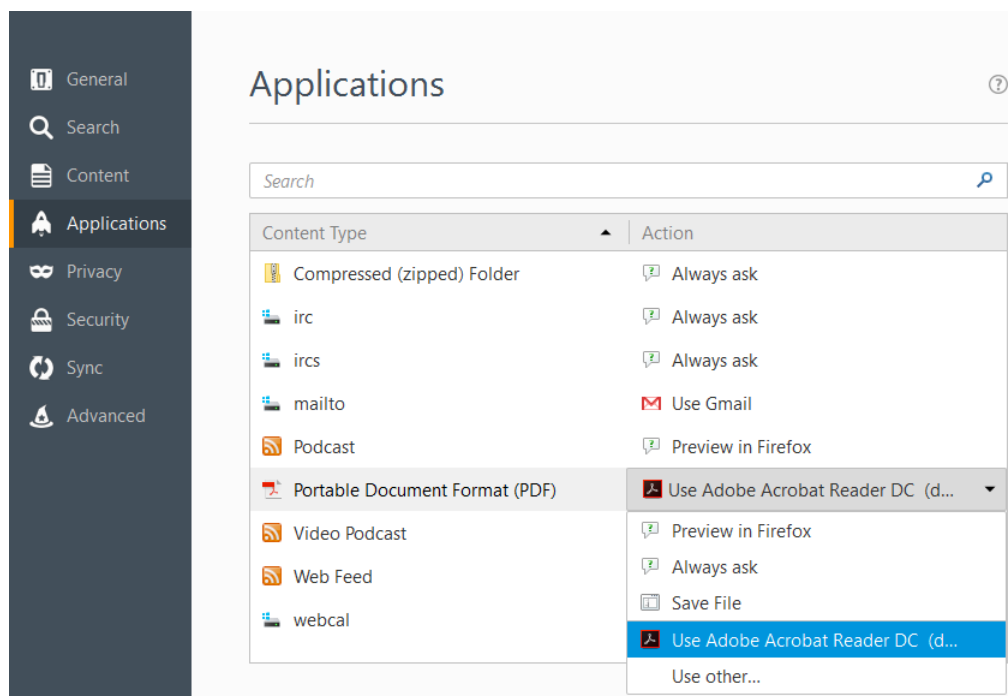


Or with newer versions of Firefox that use a built-in PDF viewer, it may appear like the file is trying to load but never completes the action. In this case, you may just get a blank (or black) screen.

In either case, you can usually correct the problem by making sure the Adobe Reader program is set up to be used to open PDF documents. Here is how to do this:

1. Be sure you have the latest version of Adobe Reader installed on your computer. There is a link to download this free program at the start of this help topic.
2. Open Firefox and click the menu button in the top right corner

3. Click on *Options* from the menu.
4. Click on *Portable Document Format (PDF)* on the list.

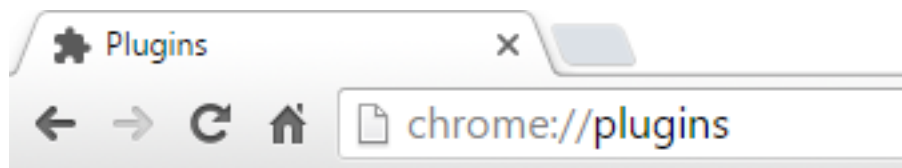


5. In the *Action* column, click the arrow in the dropdown list and select *Use Adobe Reader (default)*.
6. Close the Options tab.

### Chrome will not open PDF documents from the Volgistics Mailbox

If you use the Google Chrome web browser, it uses a built-in PDF viewer to open PDF files by default instead of the Adobe Reader program. In some cases, you may have a problem where PDF documents do not load so you can view them. In this case, you will either need to follow the steps in the *Saving PDF files to your computer before you open them* section above, or disable the built-in viewer. To disable the viewer:

1. Be sure you have the latest version of Adobe Reader installed on your computer.
2. Open a new tab in Chrome by using the new tab button or the "CTRL" + "T" keyboard combination.



3. Enter "chrome://plugins" in the omnibox (URL address bar) and press the Enter key on your keyboard.

## Plugins

### Plugins (4)

#### Widevine Content Decryption Module - Version: 1.4.8.885

Enables Widevine licenses for playback of HTML audio/video content. (version: 1.4.8.885)

[Disable](#)

Always allowed to run

#### Chrome PDF Viewer (2 files)

[Disable](#)

Always allowed to run

#### Native Client

[Disable](#)

Always allowed to run

#### Adobe Flash Player - Version: 21.0.0.242

Shockwave Flash 21.0 r0

[Disable](#)

Always allowed to run

4. Click the "Disable" link under the "Chrome PDF Viewer" heading.

### Related help

[Help Topic 1110 \[pg:0303\]](#) - Mailbox In Box Tab

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## Why a Checklist item may not apply to every volunteer

Help topic 2246

Added or revised 05-29-2008

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When you create a [Checklist \[pg:0142\]](#) item you have the option of specifying which volunteers the item will apply to. For example, a 'Health Screening' might be setup so it only applies to volunteers whose Status is Active; or a 'Drivers License Check' could be setup to apply only to volunteers who have an assignment that involves driving.

For this reason, not every volunteer will necessarily have the same items listed when you view their Checklist on the History tab.

If you have access to Setup on the menu, you can determine (or adjust) which volunteers a particular Checklist item applies to like this:

1. Choose Setup from the [menu \[pg:0215\]](#).
2. Select Checklist.
3. Click on the name of the Checklist item in question. This opens the Checklist item setup page.

Locate the section titled "Which volunteers should this item apply to?" This is where you can see (or modify) which volunteers the selected Checklist item will apply to.

Which volunteers should this item apply to?

If their Status is:

- Active
- Applicant
- Inactive
- Prospect
- Resigned

If their Type  is  is not:

If their Flag  is  is not:

If they are in this set:

Those that have any assignment with:

- Spare dropdown 1
- Spare dropdown 2
- Spare dropdown 3
- Spare dropdown 4

If there is a particular volunteer whose Checklist does not include the selected Checklist item, compare the settings under "Which volunteers should this item apply to?" to the settings in the volunteer record.

For example, if the Checklist item is setup to apply to volunteers only if their Status is 'Active,' then the selected item will not appear on the Checklist for a volunteer's whose Status is currently something other than Active (changing the volunteer's Status to 'Active' will cause the item to appear in this example).

4. If you make any changes to the Checklist item setup page, click the Save button.

If your Volgistics menu does not have the Setup option, you should ask your organization's Volgistics Administrator to check or modify the Checklist item you're interested in.

If you change the settings under "Which volunteers should this item apply to?" the system will automatically adjust each volunteer's Checklist so that the appropriate items are listed based on your new settings.

**Related help**

[Help Topic 2245 \[pg:0148\]](#) - Finding the volunteers who need to complete a Checklist item

[Help Topic 2244 \[pg:0146\]](#) - Viewing a volunteer's Checklist

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## What to do if a System Operator reports they cannot login

Help topic 2248

Added or revised 06-02-2014

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If a Volgistics [System Operator \[pg:0065\]](#) reports that they cannot login, the organization's [Volgistics Administrator \[pg:0052\]](#) (or another System Operator who can login and who has access to the [Setup \[pg:0887\]](#) menu) should perform the following System Operator check:

1. Choose Setup from the [menu \[pg:0215\]](#).
2. Select System Operators.
3. Click on the name of the System Operator who cannot login. If this person's name does not appear on the list, there are two possible reasons.

One, they have not been setup as a System Operator yet (and therefore cannot login to the system). In this case, you should add a new System Operator profile for this person. [Help topic 2026 \[pg:1440\]](#) explains how to do this.

Two, the System Operator who is looking for the other operator is a [Site-Level Operator \[pg:1442\]](#) who is not assigned to the same Site as the operator they are looking for. Site-Level Operator's can only see operators assigned to the same Site as they are.

If the name of the person who cannot login is listed, click on their name so their [System Operator page \[pg:1433\]](#) appears.

4. Make a note of the email address as it appears in the "Email address" field. This is the email address the System Operator must use when they login. Email addresses are not case sensitive (capitalization does not matter).
5. To make sure the password is not a problem, either ask the System Operator to reset their own password as shown in [help topic 1306 \[pg:0044\]](#), or follow the directions below to assign a new password to the operator.

Enter a new password in the "Password" and "Confirm password" fields. Make a note of the new password. This will be the password the System Operator must use to login.

The new password should be easy to remember, but must meet the password security guidelines found on the [System Operator Ground Rules \[pg:1442\]](#) page. If the password did not meet the guidelines, you will receive a message listing password requirements when you click the **Save** button.



### Password does not meet the password strength rules for your account.

The password you entered does not meet one of the following password rules. Passwords must:

- Be between 6 and 30 characters long.
- Include both letter and number characters.
- Include some upper and some lower case letters.
- Include some characters that are not letters or numbers, such as !#\$% or ?.
- Must not contain any space characters.

Enter a new password that conforms to these rules, and then click the Save button again.

Last name:

#### Note:

This step gives the System Operator a new password in case they have forgotten their original password. To ensure strong password protection, it is recommended that the System Operator change their password once they have logged in. [Help topic 2203 \[pg:0064\]](#) explains how they do this. You could optionally check the box next to "Operator must change their password when they login next" so they are automatically taken to a screen that requires the operator to change his or her password.

6. Check these settings under the "Rights" heading.

a. Locate the checkbox for *Block this operator's access to the system*. If this checkbox is checked, this System Operator will not be able to login from any computer. Uncheck this checkbox if you want this System Operator to be able to access the system.

b. If *Login allowed only from computers that use one of these Internet addresses*: is checked, this System Operator is allowed to access the system only from the computer or network that has the IP address(es) listed. If you want this System Operator to be able to access the system from any computer, select *Login allowed from any computer on the Internet* instead.

7. Click the **Save** button to save the System Operator profile.

8. Give the System Operator the nine-digit account number; the email address exactly as you noted it in Step 4; and the new password you created for them in Step 5 if you opted to give them a new password. Ask them to login again by visiting

[www.volgistics.com](http://www.volgistics.com)

, selecting Login from the menu at the top of the page, and entering the credentials you've given them. You can find detailed directions for this in [help topic 2297 \[pg:0220\]](#).

#### Still cannot login

If you've followed the steps listed above and the System Operator still cannot login, check these things:

1. If a System Operator cannot login it is likely that they will receive a login error message. Ask them what this message says. Asking them what this login error message is may lead you to the cause of the login problem.
2. As a security measure, Volgistics will block access from computers that make repeated attempts to login using invalid account credentials. It is possible that this System Operator triggered this kind of security block. Follow the steps in [help topic 2163 \[pg:1604\]](#) to be sure there is not a security block in place for your account.
3. System operators login by selecting Login from the menu at [www.volgistics.com](http://www.volgistics.com), not from your [VicNet \[pg:1724\]](#) link (if you use VicNet). Be sure the System Operator is going to [www.volgistics.com](http://www.volgistics.com) and selecting Login from the menu at the top of the page to login.

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## Is There a Phone Number for Volgistics?

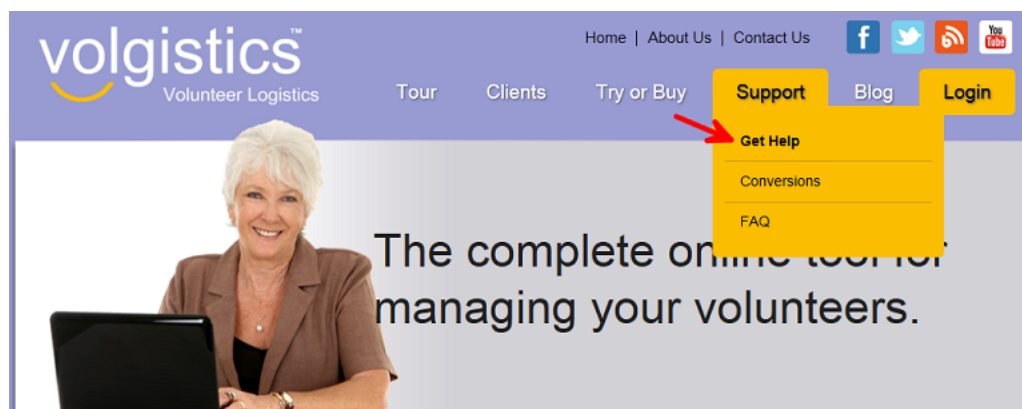
Help topic 2253

Added or revised 06-28-2013

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Volgistics has developed an excellent system of providing support through electronic means rather than a call center. Therefore, we do not have a call center telephone number. At first this may seem surprising; however our customers soon learn to rely on our rapid response to questions and the accuracy and completeness of our answers. Not sure what help topic you need, post an inquiry. If you're questioning the best way to set something up, post an inquiry. The Volgistics Team will respond promptly. It's free, it's unlimited and it never expires.

If you have a question when you're logged into Volgistics, select Help from the [menu \[pg:0215\]](#) and post your inquiry. If you're not logged in, hover over Support on the menu at [www.volgistics.com](http://www.volgistics.com) and select "Get Help."



We can answer most inquiries right away. The final resolution of some technical inquiries or questions for our business office may take longer.

Our support team is available to answer your questions weekdays from 8am to 9pm EST. On Saturday, we are available from 11am to 4pm EST. Additionally, a support team member(s) will log in at least once Saturday evening and three times throughout the day on Sunday.

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# Cookies

Help topic 2255

Added or revised 08-19-2016

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"Cookies" are small computer files saved on your computer by some websites you visit. A website that leaves a cookie on your computer can read the information in that cookie if you visit that website again in the future. Cookies are often used by websites to remember something about you (such as your login name or customer number).

All popular web browsers - and many firewalls - give you the option of blocking cookies, or allowing cookies only from certain web sites.

You do not need to permit cookies in order to use Volgistics. However, if your browser and firewall *do* permit cookies from *volgistics.com* then Volgistics can **remember certain parts of your account credentials** [pg:0220] so you do not need to enter that information every time you log in.

If your web browser blocks all cookies, you can make an exception so cookies from Volgistics are allowed. This gives you the option of blocking cookies from all other sites, while still letting Volgistics remember your login information. Here is how to do this for the popular web browsers.

## Internet Explorer

To add Volgistics to the cookie exception list in Internet Explorer:

1. Click the gear icon in the top right, and select *Internet Options*.
2. Select the Privacy tab.
3. In the Settings box, click the **Sites** button.
4. Under *Address of web site*, enter *volgistics.com* and then click the **Allow** button.
5. Click **OK** to close the Sites window, and then click **OK** to save your Internet Options settings.

## Firefox

To add Volgistics to the cookie exception list in Firefox:

1. Select the Firefox menu in the top right, and select Options.
2. Select Privacy on the left hand menu.
3. In the History section, select *Use custom settings for history* from the *Firefox will* dropdown.
3. Next to *Accept cookies from sites* click the **Exceptions...** button.
4. Under *Address of website*, enter *www.volgistics.com* and click the **Allow** button.
5. Click the **Save Changes** button.



## Safari

Safari does not have a setting to allow just cookies from Volgistics. However, you can set it to allow cookies from Volgistics and other websites by:

1. Select Safari from the menu, and select Preferences.
2. Select the Privacy tab.
3. In the *Cookies and website data* section, select either *Allow from websites I visit* (recommended), or *Always allow*.

## Chrome

To configure Chrome to allow cookies from Volgistics

1. Select the Chrome menu in the top right, and select Settings.
2. Select *Show advanced settings...*
4. Under Privacy, click the **Content settings...** button.
5. Under Cookies, click the **Manage exceptions...** button.
6. Enter an exception for *www.volgistics.com* and be sure the Behavior dropdown is set to Allow.
7. Click the **Done** button.

## Can't get Volgistics to remember your account credentials?

If you've set your web browser to permit cookies from Volgistics, but your login credentials are still not saved when you check *Remember my credentials at this computer*, it may be that your browser is clearing cookies when it exits. You should double-check your browser settings to see if this is the case.

Another possibility is that your network has a *firewall* that blocks cookies. In this case, you will need to ask the person who manages your Internet connection to be sure the firewall permits cookies from *www.volgistics.com*.

## Blocking Cookies from Volgistics

If you have a computer that is shared by two or more different Volgistics [System Operators \[pg:0065\]](#), you may want to prevent Volgistics from saving any System Operator login credentials at

*that*

computer (so each system operator will be required to enter their own login name and password when they use this computer). If this is the case, and you have access to the [Setup \[pg:0887\]](#) page, you can prevent Volgistics from saving these account credentials like this:

1. Choose Setup from the [menu \[pg:0215\]](#).
2. Click on *Account management*.

3. Click on Cookies.
4. In the Block section, click the **Block** button.

When cookies from Volgistics are blocked from the Cookies page, the Login page remembers the account number but not any user's email address or password on that computer. The Login page also no longer contains the *Remember my credentials at this computer* checkbox.

If you have saved your login name or account number to a cookie previously, and you no longer want your saved account number or login name to appear when you open the Secure Login page, [clear the cookies \[pg:1597\]](#) in your web browser.

## Related help

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### Enable JavaScript

Help topic 2277

Added or revised 05-16-2016

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Volgistics uses JavaScript to add program functionality to most pages. Your web browser (e.g. Internet Explorer, Chrome, or Firefox) has settings you can use to either allow, or prevent JavaScript from running on the web pages you visit. To use Volgistics, your browser must permit JavaScript, at least from the web pages at [www.volgistics.com](http://www.volgistics.com).

#### To enable JavaScript for all websites in Microsoft Internet Explorer

1. Start Internet Explorer.
2. Click the gear icon in the top right corner, and then select 'Internet Options'.
3. Select the 'Security' tab.
4. Click on the "Internet" icon.
5. Click the 'Custom level' button.
6. Scroll down to the 'Scripting' section. Set 'Active Scripting' to 'Enable' or 'Prompt.'
7. Click the **OK** Button.

#### To enable JavaScript in Microsoft Internet Explorer for Volgistics only

Follow these instructions if your web browser is Microsoft Internet Explorer, and you want to enable JavaScript only for Volgistics (and other sites you might specify).

1. Open Internet Explorer.
2. Click the gear icon in the top right corner, and then select 'Internet Options'.
3. Select the 'Security' tab.

4. Click on the "Trusted Sites" icon.
5. Click the 'Sites' button.
6. In the "Add this web site to the zone" field, enter <https://www.volgistics.com> and click **Add**
7. Click the **Close** button.
8. Click the **Custom level** button.
9. Scroll down to the 'Scripting' section. Set 'Active Scripting' to 'Enable.'
10. Click the OK Button.

### **To enable JavaScript in Safari**

Follow these instructions if your web browser is Apple Safari.

1. Start Safari.
2. From the Safari menu, select Preferences
3. Click on the "Security" icon.
4. In the "Web content" section, check "Enable JavaScript".
5. Close the Preferences window.

### **To enable JavaScript in Chrome for all websites**

1. Open Chrome
2. Click the menu icon in the top right corner, then click Settings
3. At the bottom of the page click "Show advanced settings"
4. Under "Privacy" click **Content settings**
5. Under "JavaScript" select "Allow all sites to run JavaScript (recommended)".
6. Click **Done**

### **To enable JavaScript in Chrome for Volgistics only**

1. Open Chrome
2. Click the menu icon in the top right corner, then click Settings
3. At the bottom of the page click "Show advanced settings"

4. Under "Privacy" click **Content settings**
5. Under "JavaScript" click **Manage exceptions**.
6. Under "Hostname pattern" enter `www.volgistics.com` and then select "Allow"
7. Click **Done**
8. Click **Done** again.

## JavaScript in FireFox

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# Internet Connection Problem at VicTouch

Help topic 2290

Added or revised 07-21-2009

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The [VicTouch \[pg:1778\]](#) station uses the Internet to interact with Volgistics. When volunteers use VicTouch, their PIN number is passed back and forth between the VicTouch station and the database via the Internet.

The "Internet Connection Error" message appears at VicTouch if the VicTouch station cannot connect to the database over the Internet.

### Internet Connection Error

There is a problem with the network or Internet connection from this Volunteer Information Center station.

The network error number is: **12029**

Please visit again in a few minutes. If the Volunteer Information Center is still not operating normally, please alert the appropriate person or department.

Thank you.

This message will appear until Internet connectivity is restored to the workstation. Once Internet connectivity is restored, this message will clear itself and VicTouch will return to normal operation automatically.

### What to do if you see this message at a VicTouch station

Perform these steps **at the VicTouch station** where the problem exists:

1. Make a note of the "network error number" that appears in the message.
2. [Shut down VicTouch \[pg:1762\]](#).
3. Using Internet Explorer at the VicTouch station, browse to [www.volgistics.com](http://www.volgistics.com). Also try browsing to any Web site other than [www.volgistics.com](http://www.volgistics.com) (e.g. visit <http://www.google.com>).

If you cannot connect to web sites other than [www.volgistics.com](http://www.volgistics.com) (such as [www.google.com](http://www.google.com)), you are probably not currently connected to the Internet from this computer (the Internet connection has dropped). You should consult your Internet Service Provider or IT department for further assistance. Tell them that you cannot connect to the Internet from the VicTouch station.

If you *can* connect to other web sites, but you cannot connect to [www.volgistics.com](http://www.volgistics.com), check to see if there is a firewall installed between the VicTouch station and the Internet, or if the VicTouch station has a software firewall. If there is, be sure it is configured to allow connections to <https://www.volgistics.com>. Also, check that port 443 (which is needed for secure Internet access) is not disabled. Refer to your firewall's documentation for instructions on how to adjust these settings.

If you can connect to other web sites, but you cannot connect to [www.volgistics.com](http://www.volgistics.com), and you have determined that you are not blocked by a firewall: [post a help inquiry \[pg:0184\]](#) for the Volgistics Team. Let them know you have received the 'Network Connection Error' page at VicTouch, and include the "network error number" you noted in step 1.

Restart VicTouch using your VicTouch shortcut, or visiting [www.volgistics.com/touch](http://www.volgistics.com/touch) once the network problem is resolved.

### **VicTouch connection requirements**

Each VicTouch computer must have access to the Internet through a *persistent connection*, such as through a local area network, DSL, or cable modem. VicTouch is robust. If a temporary Internet connection problem occurs, VicTouch will continue working as soon as the connection is restored without any intervention.

If you experience frequent internet connection problems from one specific computer but not others, it is likely the problem is related to a network configuration or network connection problem at that specific computer. Wireless network connections can sometimes cause connection problems from a specific computer. If the problem computer uses a wireless network connection it may be that the wireless signal is occasionally weak or intermittent. Consider using a wired connection instead. You should contact the person who supports your network for further assistance.

VicTouch computers do not need to be networked to any other computers in your organization. If you use more than one VIC computer, they do not need to be networked with one another.

### **Related help**

[Help Topic 8271 \[pg:1527\]](#) - Setup a VicTouch computer

[Help Topic 2289 \[pg:1765\]](#) - VicTouch desktop shortcuts

[Help Topic 2283 \[pg:1762\]](#) - Shutting down VicTouch

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## Why can't I see or find volunteer records?

Help topic 2291

Added or revised 04-08-2016

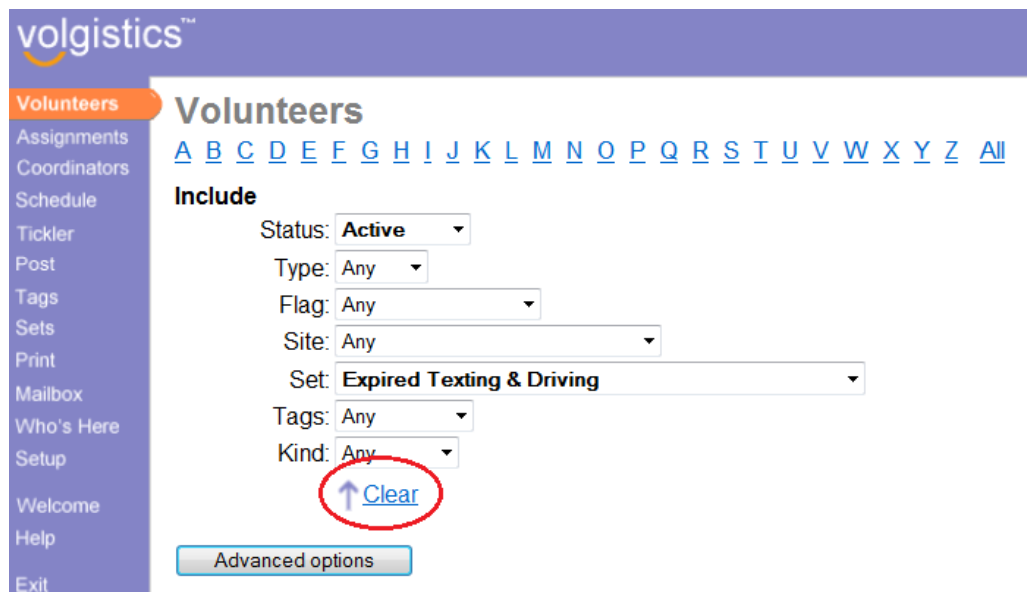
---

If there do not appear to be any volunteer records in your database or if you can't find certain records, but you know the records have been entered, follow these steps:

### Clear the "Include" options

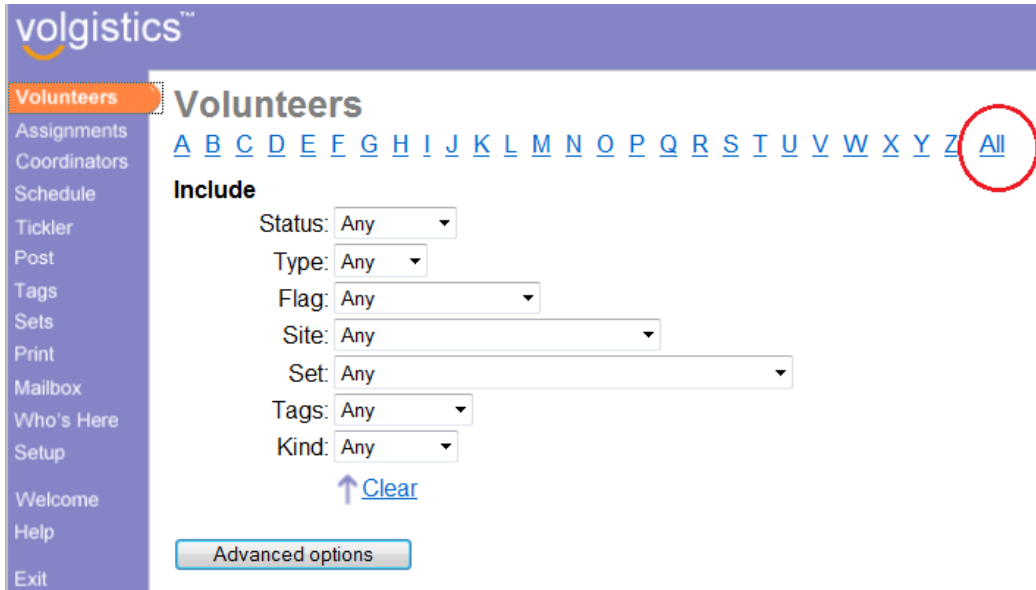
It's possible that you have selected an "Include" option on the Volunteers page that prevents you from seeing some, or all, of your volunteer records. Perform these steps to be sure no Include options are selected:

1. Choose Volunteers from the [menu \[pg:0215\]](#).
2. Click the "Clear" link under the "Include" section.



The screenshot shows the Volgistics interface. On the left is a navigation menu with 'Volunteers' highlighted. The main content area is titled 'Volunteers' and includes a list of letters for filtering (A through Z and All). Below this is the 'Include' section with several dropdown menus: Status (Active), Type (Any), Flag (Any), Site (Any), Set (Expired Texting & Driving), Tags (Any), and Kind (Any). A blue 'Clear' link with an upward arrow is circled in red. At the bottom of the 'Include' section is a button labeled 'Advanced options'.

3. Click the "All" link near the top of the Volunteers page.



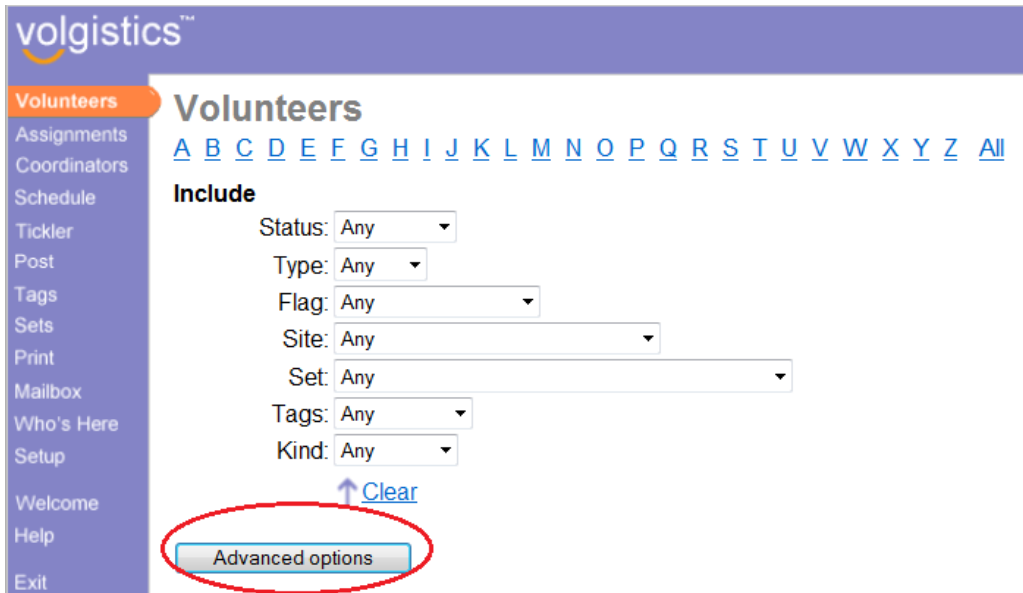
You should now see a list of your volunteer records. If the records you are looking for do not appear when you click the "All" link, continue to the next step.

### Check for archived records

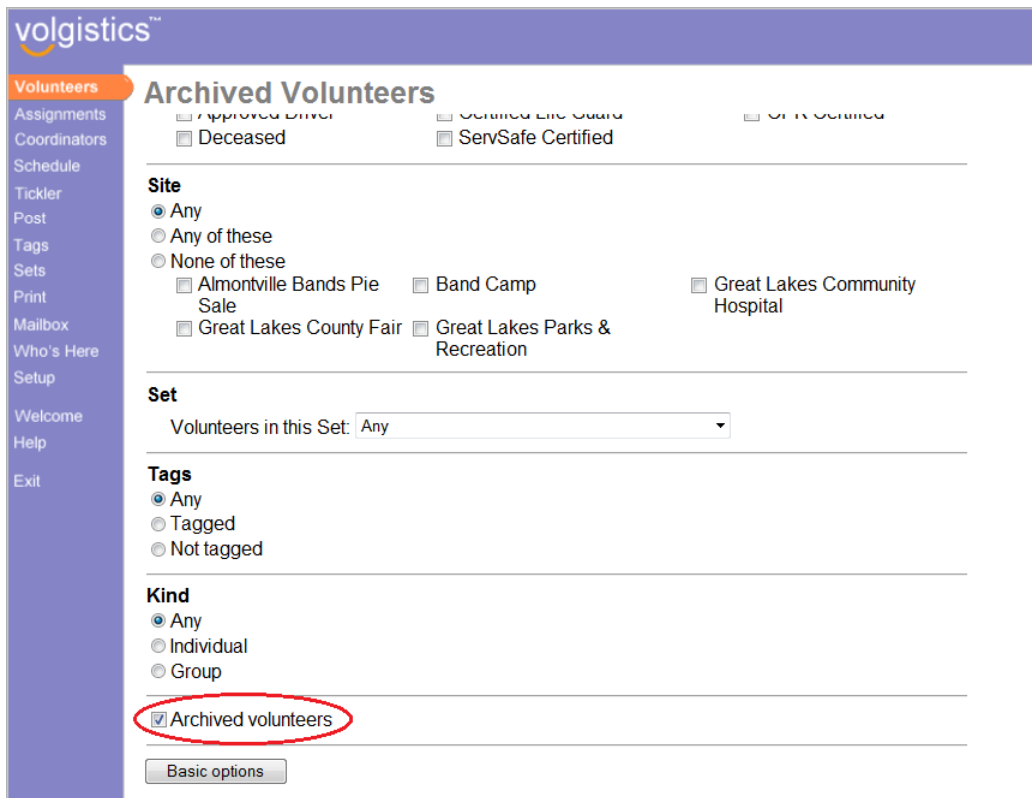
The volunteer record(s) you're looking for might be archived.

To check this:

1. Choose Volunteers from the menu.
2. Click the "Advanced options" button under the "Include" section.



3. Check the box next to "Archived Volunteers".



4. Click the "All" link near the top of the Volunteers page.

The archived volunteer records for your account will now be shown on the screen. If the record(s) you are looking for do not appear, continue to the next step.

### Check for Site Level Access

If your organization uses the [Site Level Access \[pg:0092\]](#) features, and your Volgistics [System Operator \[pg:0065\]](#) profile is setup to give you access only to the volunteer records for a specific site; the record(s) you are looking for may not be associated with your site.

To check this:

1. Choose Help from the [menu \[pg:0215\]](#).
2. Click the link for "Operator information."
3. On the "Operator profile" page, locate the "Site" field.

If the "Site" field lists the name of one of your organization's Sites, you only have access to the volunteer records associated with that Site. If the volunteer record(s) you're looking for have not been [associated with this Site \[pg:0094\]](#), they will not appear on your list of volunteer records. In this case, you should contact your organization's Volgistics Administrator (the person who setup your Volgistics system operator profile) for assistance.

If the "Site" field contains "All sites" you should continue to the next step.



## Check your volunteer record count

Check to be sure your Volgistics account contains volunteer records. To do this:

1. Choose Setup from the [menu \[pg:0215\]](#) (if you do not have a Setup option on the menu, contact your organization's Volgistics Administrator for assistance).
2. Select "Account management."
3. Select "Account status."
4. The "Number of volunteer records currently in your account:" field shows the number of volunteer records in your account.

The "Number of volunteer records currently in your account" would be zero if

- No volunteer records have been entered yet. If you have more than one Volgistics account, check to be sure you have accessed the account in which you've entered volunteer records.
- You or someone in your organization has [archived \[pg:1819\]](#) all of the volunteer records.
- You or someone in your organization has [cleared \[pg:0890\]](#) this account.

You may be able to determine if someone in your organization removed or archived volunteer records by viewing your Volgistics Event Log. To view the Event Log:

1. Choose Setup from the [menu \[pg:0215\]](#) (if you do not have a Setup option on the menu, contact your organization's Volgistics Administrator for assistance).
2. Select "Account management."
3. Select "Event log."

### Related help

- [Help Topic 1112 \[pg:0028\]](#) - Event Log
- [Help Topic 2023 \[pg:1982\]](#) - Finding Volunteer Records
- [Help Topic 2035 \[pg:0092\]](#) - Site Level Access

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## Spell Checking

Help topic 2318

Added or revised 05-16-2016

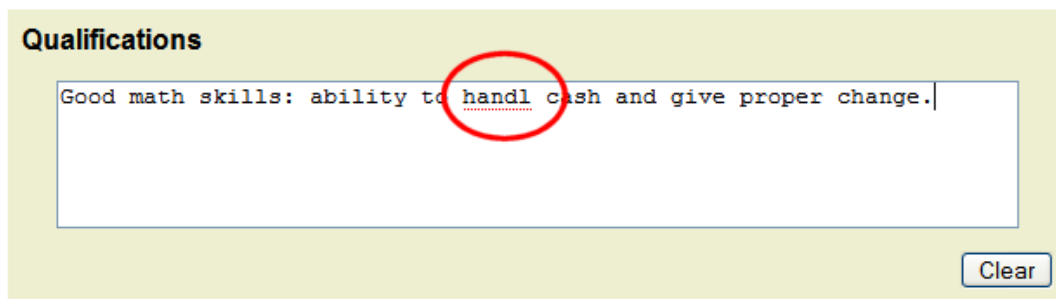
---

It's often useful to perform spell checking on volunteer notes, job descriptions, email messages, and other text as you enter them in Volgistics. Since Volgistics is a browser-based application, spell checking is a function your web browser must provide. Fortunately, most web browsers provide spell checking capabilities.

This help topic explains how to enable or use spell checking with Firefox, Chrome, Safari, and Internet Explorer web browsers.

### Firefox

Firefox supports both dynamic and context-based spell checking. This is automatically enabled. Firefox will check any text you enter and alert you to possible errors by adding a red underline to any potentially misspelled words, as shown here.



Right-clicking the underlined word (or on a Mac, press and hold the [CONTROL] key while left-clicking) will bring up a spelling menu that may include one or more possible corrections. Highlight the proper word and Firefox will replace it in the text field.

If the word is spelled correctly but still marked as a potential mistake, you can ignore it and move on, or choose "Add to Dictionary" to add the word to Firefox's dictionary.

## Chrome

The Chrome web browser also supports both dynamic and context-based spell checking. This is automatically enabled with the browser. Chrome spell checking works similar to the Firefox example shown above. Words that are possibly misspelled are identified with a red line under them. Right-clicking on the underlined word brings up possible corrections to choose from. You can highlight the correct word from the list and it will be inserted into the text field. If you do not see the correct word on the list, select "Ask Google for suggestions" to see additional possibilities.

If the word is spelled correctly but still marked as a potential mistake, you can ignore it or choose "Add to dictionary" to add the word to Chrome's dictionary on your computer, and/or for your Google account if you have one setup.

## Safari

The Safari browser also supports both dynamic and context-based spell checking. To activate the browser's native support for dynamic spell checking:

1. Place the cursor in a text entry field on any webpage.
2. Right-click in the text field and hover over Spelling and Grammar - then select "Check Spelling While Typing", "Check Grammar with Spelling," or both.
3. A small checkmark should appear to the left of the Check Spelling While Typing or Check Grammar with Spelling option indicating that spell checking is now active. From this point forward, Safari will check any text you enter and alert you to possible errors by adding a dashed red underline to any potentially misspelled word(s). Press and hold the [CONTROL] key while right-clicking the indicated word. A spelling menu will open and should present one or more possible corrections; highlight the proper word and Safari will replace it in the text field.

If the word is spelled correctly but still marked as a potential mistake, choose "Ignore Spelling" to skip the word or "Learn Spelling" to add the word to Safari's dictionary.

Note: On older versions of Safari the Check Spelling as You Type feature only remains active as long as Safari is open; it must be reactivated each time the browser starts. Newer versions save the previous setting.

Safari also supports context-based spell checking. To use this feature on a single word or phrase:

1. Highlight the text to be checked.
2. Press and hold the [CONTROL] key while right-clicking the indicated word(s).
3. Select the correct word from the context menu or choose "Ignore Spelling" or "Learn Spelling" as necessary.

To use context-based checking on every word in a text area (such as a large text box):

1. Place the cursor in the text area to be checked.
2. Press and hold the [CONTROL] key while right-clicking inside the text area.
3. Choose Spelling and Grammar -> Check Document Now from the menu.
4. Correct, ignore, or add each potential misspelling by [CONTROL] right-clicking the marked words in turn.
5. Both of these context-based methods of spell checking are also available by clicking Edit on the menu bar and selecting one of the options under Spelling and Grammar.

Note: Grammar corrections will highlight the words, but right-clicking on them will not offer suggested changes. However, hovering over them will suggest possible corrections.

### Internet Explorer

Internet Explorer 11 includes built-in spell checking features. This is automatically enabled with the browser. Spell checking works similar to the Firefox and Chrome examples above. Words that are possibly misspelled are identified with a red line under them. Right-clicking on the underlined word brings up possible corrections to choose from. You can highlight the correct word from the list and it will be inserted into the text field.

If the word is spelled correctly but still marked as a potential mistake, you can ignore it or choose "Add to dictionary" to add the word to Internet Explorer's dictionary on your computer.

### Spell Checking for HTML emails in Volgistics

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## Nothing happens when you touch the Continue button on the VicTouch F

Help topic 2328

Added or revised 05-16-2016

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Follow the steps below if you are using VicTouch with Internet Explorer and an error message appears with "Automation server can't create object," or no error message appears but the PIN Number page appears to freeze, after you enter a PIN number and then touch (or click) the **Continue** button.

1. Start Internet Explorer.
2. Click the gear icon in the top right and then select **Internet Options**.
3. Select the Advanced tab.
4. Under "Security" locate the option for "Enable native XMLHTTP support." Be sure the checkbox next to this option is checked.
5. Click the **OK** button in the Internet Options dialog box.

VicTouch makes XMLHTTP connections to the Volgistics system. If XMLHTTP support is turned-off in Internet Explorer, VicTouch will not function properly. The first XMLHTTP connection typically occurs when you click or touch the **Continue** button on the PIN number screen. If VicTouch appears to freeze (nothing happens) when you click or touch this **Continue** button, it is likely that XMLHTTP support is disabled. To solve this problem enable Internet Explorer support for XMLHTTP at the VicTouch computer as described above.

XMLHTTP support is not required at computers where you use Volgistics. XMLHTTP support is only required for the VicTouch module.

#### Related help

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## Why am I receiving a "Webpage has expired" or "Session expired" message?

Help topic 2546

Added or revised 04-26-2016

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There are a couple of screens that users may occasionally see when working in Volgistics. The

#### *Webpage has expired*

message appears when a user clicks on the browser's

**Back** button. The *Session expired* message appears after a period of inactivity or if two [System Operators \[pg:0065\]](#) try to login with the same credentials at the same time. This help topic explains these two messages and how to proceed when they appear in Volgistics.

#### **Webpage has expired**

To prevent you from seeing information that may now be outdated, and from inadvertently saving outdated information from a copy of a web page, clicking your [web browser's Back button \[pg:1600\]](#) when using Volgistics may result in a *Webpage has expired* message.

If you see the *Webpage has expired* message while you are still in Volgistics, simply use the Volgistics [menu \[pg:0215\]](#) to continue navigating through the system.

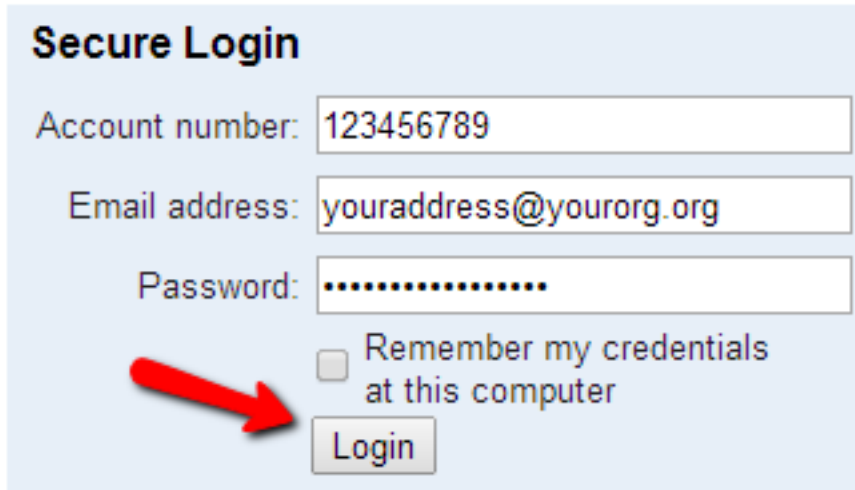
#### **Session expired**

In contrast to the

*Webpage has expired* message that appears as a result of using the **Back** button in your web browser, the *Session expired* [\[pg:1589\]](#) message appears after a period of approximately 60 minutes of inactivity while you are logged into Volgistics. This is a built-in security feature to prevent others from accessing your Volgistics session while you are away from your desk.

If the *Session expired* message appears, you can continue working by:

1. Visit [www.volgistics.com](http://www.volgistics.com).
2. Select Login from the menu at the top of the page.
3. Enter your account number, email address, and password in the Secure Login box. The email address field is not case sensitive, but the password field is.
4. Click the Login button.



**Secure Login**

Account number:

Email address:

Password:

Remember my credentials at this computer

A red arrow points to the Login button.

[Forget your password?](#)

---

# Getting Started with VicDocs

Help topic 2547

Added or revised 02-11-2016

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VicDocs is an optional Volgistics module used to upload and store electronic documents. You do not need to include VicDocs in your account's [service level \[pg:0719\]](#) to use Volgistics. However, if you do include VicDocs, the module provides paperless storage and management for documents associated with your organization. You can find answers to many questions about the VicDocs module in [help topic 3019 \[pg:1648\]](#).

This help topic explains the steps to take if you want to get started with the VicDocs module. Some of the steps require access to [Setup \[pg:0887\]](#) on the menu. If you are a [Volgistics Administrator \[pg:0052\]](#) for the account, you automatically have access to Setup. If you are a Power or Basic Level operator, you may or may not have access to Setup. If you do not have access to Setup, you will need to have an Administrator for your account complete the steps.

## 1. Check if VicDocs is included in your account's service level

The [service level \[pg:0719\]](#) for your account controls whether or not you will be able to use the VicDocs module to store electronic document files. You can determine if VicDocs is currently included in your account's service level by:

1. Select [Setup \[pg:0887\]](#) from the menu.
2. Expand the *Account management* link.
3. Select *Account status*.
4. Locate the *Service Level* section and look for the *VicDocs* item. It will say *No* after the item if your service level does not include VicDocs. It will say *Yes* after the item if your service level does include VicDocs.

If VicDocs is not included in your account's service level, you can add it by following the steps shown in [help topic 2007 \[pg:0050\]](#).

## 2. Set the operator rights for the Docs tabs

You can set the operator rights for VicDocs according to the operator's user level. This allows you to customize which operators can perform actions such as viewing documents, editing document names, uploading documents, etc. You can find directions on setting the operator rights for VicDocs in [help topic 2553 \[pg:1319\]](#).

## 3. Start using VicDocs

You are now ready to start using the VicDocs feature to store and manage electronic documents for your account. You can find information on how to use the Docs tab on the different records that allow document storage in the following help topics:

- [Help topic 2548 \[pg:1630\]](#) - Docs tab (Volunteer Record)
- [Help topic 2549 \[pg:1636\]](#) - Docs tab (Coordinator Record)
- [Help topic 2550 \[pg:1642\]](#) - Docs tab (Site, Place or Assignment Record)

The documents uploaded to individual volunteer, Coordinator, Site, Place, or Assignment records are consolidated on the Documents tab of your Volgistics mailbox. This gives you the ability to work with uploaded documents for multiple records. You can find more information on using the Documents tab of the mailbox in [help topic 2142 \[pg:0388\]](#).

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## Docs Tab (Volunteer Record)

Help topic 2548

Added or revised 11-18-2015

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The Docs tab is the last tab on the right hand side of volunteer records. If you are not able to see the tab, your [System Operator \[pg:0065\]](#) rights do not allow access to the tab. You will need to contact your account's [Administrator \[pg:0052\]](#) for further assistance in this case.

The tab stores electronic documents uploaded for the volunteer using the [VicDocs \[pg:1648\]](#) feature. If your account's [service level \[pg:0719\]](#) does not include VicDocs, the Docs tab is still used to store a [PDF \[pg:0449\]](#) copy of the volunteer's completed [application form \[pg:0413\]](#). You can find more information on this in [help topic 2552 \[pg:1373\]](#).

This help topic reviews some of the basic features of the Docs tab. You can click on an item in the *Contents* box below to go directly to that section of the help topic.

### Contents

#### Stored Documents

Open or Print Documents

Save Documents Locally

Rename Documents

Delete Documents

Sorting Documents

Filtering Documents

Resetting the Filter

#### Uploading Documents

File Types

Capacity and File Size

Optimizing or Compressing Files

Uploading Files

Document Storage and HIPAA

Virus Scanning

#### **Stored Documents**

The top section of the Docs tab is titled *Documents* and it is where you will see documents that have been uploaded for the volunteer.





# Holliday, John

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

Refresh Filter  Tagged

**Documents**

5 documents on file. You may have a maximum of 50 documents on file.

<a href="#">Kind</a>	<a href="#">File Name</a>	<a href="#">Uploaded</a>	
<input type="checkbox"/>	 <a href="#">Survey Results</a>	11/16/15 1:47 PM	<input type="button" value="Edit"/>
<input type="checkbox"/>	 <a href="#">Resume</a>	11/16/15 1:44 PM	<input type="button" value="Edit"/>
<input type="checkbox"/>	 <a href="#">Photo Release Form</a>	11/11/15 6:43 PM	<input type="button" value="Edit"/>
<input type="checkbox"/>	 <a href="#">Badge Photo</a>	11/12/15 4:20 PM	<input type="button" value="Edit"/>
<input type="checkbox"/>	 <a href="#">Application-Individual Volunteer Form</a>	11/03/15 9:57 PM	<input type="button" value="Edit"/>

Click Delete to delete the **checked** documents:

The sections below have more information on how to use the controls for the top portion of the Docs tab.

## Open or Print Documents

In many cases you can just click on a document's file name to open the document. Your web browser will launch the program it needs to open the document. In some cases your web browser's settings are not configured to recognize the file type so the file will not open. In this case, you will either need to change your web browser's settings so that it associates the correct program with the file extension, or you can often save the document to your local computer and open it from the saved location. The Save Documents Locally section of this help topic shows how to do this.

Once the document has been opened with the appropriate program, you can send it to your local printer by using the print feature in whatever program you're using.

Many web browsers are using built-in PDF viewers now instead of the

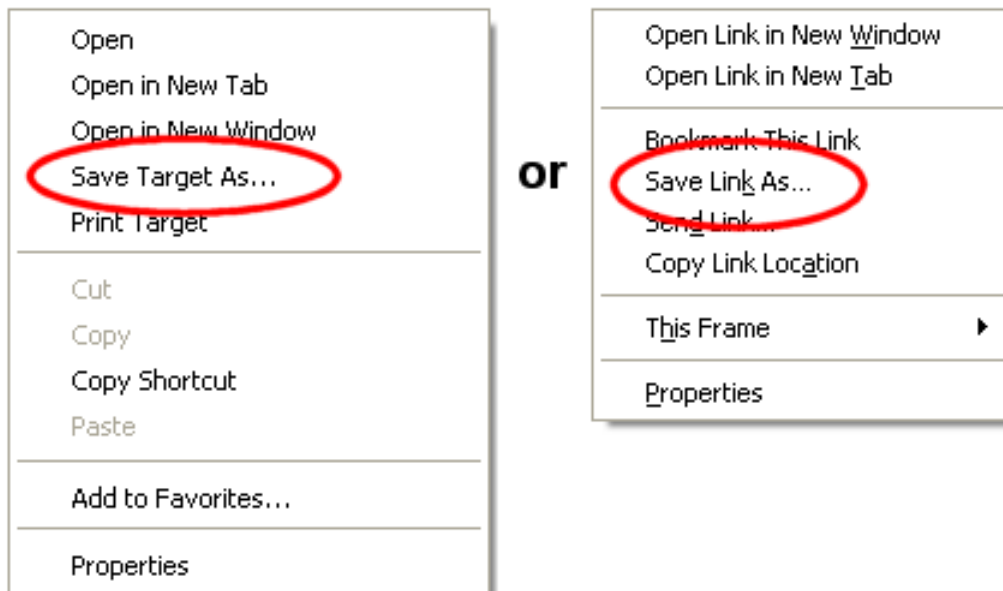
Adobe Reader

program. This can also cause trouble with opening PDF documents. In this case you may need to disable the built-in viewer if you do not want to save the file locally. You can find more information on how to do this in [help topic 2176 \[pg:1606\]](#).

## Save Documents Locally

You can save uploaded documents to your local computer (flash drive or other storage medium) without opening the file if you wish. To do this, right-click on the name of the document and then select "Save target as...", "Save link as..." or "Save as..." from the prompt.





## Rename Documents

You can change the name that shows for an uploaded document if you'd like. To do this, click the **Edit** button on the right side of the row where the document appears. An *Edit Document* box will pop up. Edit or replace the document's title and click the **Save** button to keep your changes. Click the **Cancel** button to close the window without changing the document's name.

## Delete Documents

To delete uploaded documents, check the box in the column on the left side by each document you want to delete. If you want to delete all of the documents on the page, scroll down to the bottom of the Documents section and click the **Check all** button. Once the documents you want to delete are marked, click the **Delete** button. A pop-up will appear to make sure you want to completely delete the documents. Click the **OK** button to proceed or the **Cancel** button if you changed your mind and you would like to keep the documents.

*There is not a way to recover documents after they have been deleted so please make sure you want to delete the documents before you proceed.*

## The Delete button does not appear . . .

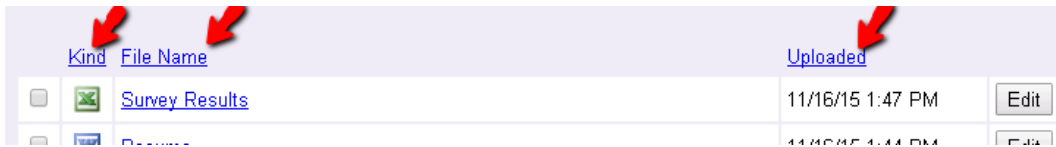
If the

### Delete

button does not appear on the Docs tab it means one of two things. There are either no documents uploaded for the volunteer yet, or your [System Operator \[pg:0065\]](#) rights do not allow you to delete documents. Your operator rights are controlled by the [Administrator \[pg:0052\]](#) of your Volgistics account as shown in [help topic 2553 \[pg:1319\]](#).

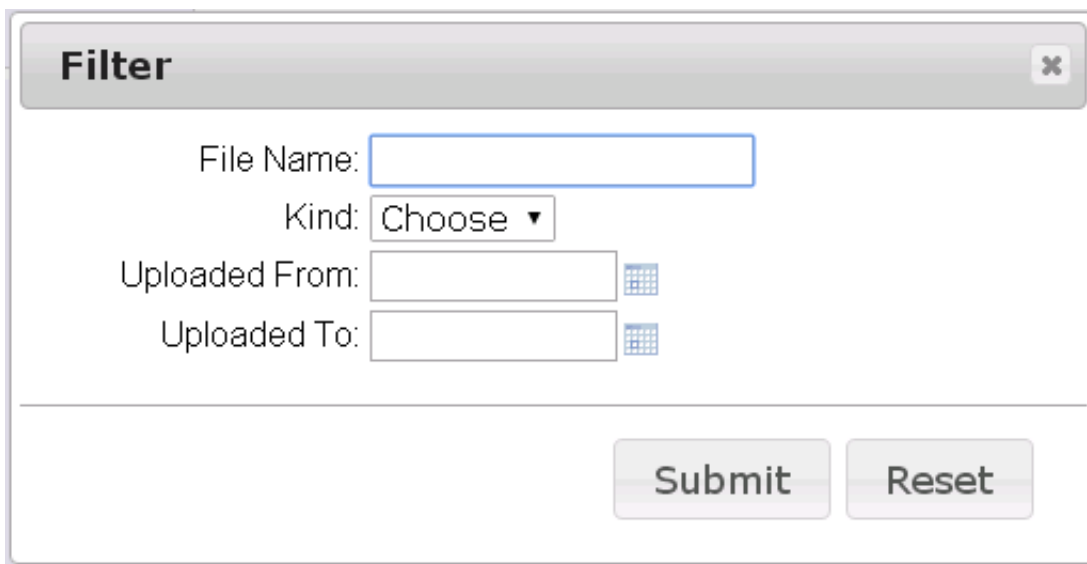
## Sorting Documents

By default the Docs tab is sorted according to the order the documents were added to your database. The most recently added documents will be at the top. You can change the view to be sorted by the *Kind*, *File Name* or *Uploaded* column instead. Just click on a column heading to sort the view based on that column's information.



## Filtering Documents

You can filter the Docs tab to only show certain documents. To do this, click the **Filter** button in the top left corner. This will open a dialogue box where you can select the filter options.

A screenshot of a 'Filter' dialog box. The dialog has a title bar with the word 'Filter' and a close button (X). Inside, there are four input fields: 'File Name:' with a text box, 'Kind:' with a dropdown menu showing 'Choose', 'Uploaded From:' with a text box and a calendar icon, and 'Uploaded To:' with a text box and a calendar icon. At the bottom, there are two buttons: 'Submit' and 'Reset'.

There is more information on how each item works below. Please note that you can use more than one option at the same time to refine the documents shown. The filtered view will only show documents that meet all of the requirements you select.

File Name: Type the first part of the first word in the name of the file(s) you want to see. The more characters you enter, the more refined the filter will be.

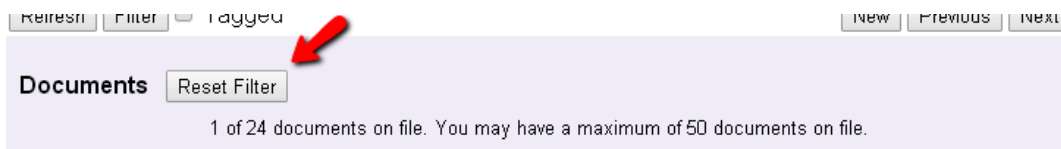
Kind: Use the dropdown to select which type of document files you want to have shown.

Uploaded From: Enter a date to limit the Docs tab to just documents uploaded on or after a certain date.

Uploaded To: Enter a date to limit the Docs tab to just documents uploaded on or before a certain date.

## Resetting the Filter

If your view of the Docs tab is currently filtered, there will be a **Reset Filter** button to the right of the word *Documents* at the top left of the page.



Click the **Reset Filter** button to return the Docs tab to the un-filtered view.

## **Uploading Documents**

The bottom section of the Docs tab is titled *Upload* and it is where you can upload documents for the volunteer.

**Upload**  
Upload new PDF, Word, Text, XLS documents or images.

*We recommend optimizing your PDF documents before uploading to make the most of your storage space. Click [here](#) for more information.*

**IMPORTANT**  
Please remember that Volgistics is not HIPAA compliant, and should not be used to store protected health information. Click [here](#) for more information.

**Step 1**  
Click the choose file button to select the file you want to upload.

No file chosen

**Step 2**  
Click the Upload button to start uploading.

The sections below have more information on how to use the controls for the bottom portion of the Docs tab.

### **The Upload section does not appear . . .**

If you do not see the Upload section at the bottom of the Docs tab, one of the following applies:

1. The **VicDocs** [pg:1648] module is not included in your account's **service level** [pg:0719]. In this case, the service level will need to be changed to **include VicDocs** [pg:0050].
2. Your **System Operator** [pg:0065] rights do not include the right to upload documents to this tab. In this case, you will need to contact your account's **Administrator** [pg:0052] to have him or her **change your operator rights** [pg:1319] for the tab.
3. The Docs tab has reached its capacity. In this case, you will need to delete older documents in order to upload new documents.

### **File Types**

The following file types can be uploaded for volunteers:

File Type	File Extension(s)
Image	.bmp, .gif, .jpeg, .jpg, .png
Microsoft Excel	.xls, .xlsx
Microsoft PowerPoint	.ppt, .pptx
Microsoft Word	.doc, .docx
Portable Document Format (PDF)	.pdf
Text	.rtf, .txt

### Capacity and File Size

The Docs tab can hold up to 50 electronic document files that are 10 megabytes (10,485,760 bytes) or smaller. There is not a way to upload over 50 documents, or upload files larger than 10 megabytes. If you have reached the 50 file limit, older files can be deleted. If a file is over the size limit, you can optimize or compress the file to make it smaller.

### Optimizing or Compressing Files

Before uploading larger files, we recommend optimizing or compressing the file first. This reduces the file size, which means it will upload, open and transfer faster. Optimization and compression usually apply only to image and PDF [pg:0449] files. Generally the program used to create the file will have features that allow you to optimize or compress the file.

We found these resources on how to optimize PDF files using some common programs:

- If you use Microsoft Word and the "Save as" function to save in the PDF format, select "Minimum Size (publishing online)" as the "Optimize for" option. More information.
- If you use Adobe Acrobat, use the PDF Optimizer under the Advanced menu. More information.
- If you use a Nuance program (such as PDF Converter Pro or PDF Converter Enterprise), select Tools then "Optimize PDF." More information.

You may need to search the Internet, or refer to the help documentation for the program you use, for more information on how to reduce the file's size.

### Uploading Files

You can upload files to the Docs tab by:

1. Click the **Choose File** or **Browse** button.
2. Select the file to upload and click the **Open** button. You can find acceptable file types here.
3. Click the **Upload** button. Once the upload is complete, your document will be listed in the Documents section of the Docs tab.

### Document Storage and HIPAA

Please keep in mind that Volgistics is designed to be a

*volunteer*

management system. As such it is

*not*

intended to be used to store, process or transmit HIPAA protected information so it is not a Covered Entity for HIPAA regulations. There is more information on this in [help topic 8273 \[pg:0091\]](#).

## **Virus Scanning**

To protect the system and your account, Volgistics automatically scans documents for possible viruses before making the document available. You will see a "(waiting to be scanned)" message after the document's name while this is being done, and the document's name will not be a clickable link. In some cases, you will need to click the **Refresh** button in the top or bottom left corner to have the tab update after the scan has been completed.

If a virus is found on a document, it will be removed from the system and an alert will be sent to the [In Box \[pg:0303\]](#) of your Volgistics mailbox.

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## **Docs Tab (Coordinator Record)**

Help topic 2549

Added or revised 11-23-2015

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The Docs tab is the last tab on the right hand side of [Coordinator \[pg:0163\]](#) records. It is used to store electronic documents uploaded for the Coordinator using the [VicDocs \[pg:1648\]](#) feature. If you are not able to see the tab, one (or both) of the following apply:

1. Your [System Operator \[pg:0065\]](#) rights do not allow access to the tab. You will need to contact your account's [Administrator \[pg:0052\]](#) for further assistance in this case.
2. Your account's [service level \[pg:0719\]](#) does not include VicDocs. You can find information about adding VicDocs to your service level in [help topic 2007 \[pg:0050\]](#).

This help topic reviews some of the basic features of the Docs tab. You can click on an item in the *Contents* box below to go directly to that section of the help topic.

### **Contents**

#### Stored Documents

- Open or Print Documents
- Save Documents Locally
- Rename Documents
- Delete Documents
- Sorting Documents
- Filtering Documents
- Resetting the Filter

#### Uploading Documents

- File Types
- Capacity and File Size
- Optimizing or Compressing Files

Uploading Files  
Document Storage and HIPAA  
Virus Scanning

## Stored Documents

The top section of the Docs tab is titled *Documents* and it is where you will see documents that have been uploaded for the Coordinator.

### Saunders, Stephanie

Kind	File Name	Uploaded	
	<a href="#">Photo Release</a>	11/23/15 7:22 PM	<input type="checkbox"/> Edit
	<a href="#">Job Description</a>	11/17/15 9:09 AM	<input type="checkbox"/> Edit
	<a href="#">Interview Notes</a>	11/13/15 3:07 PM	<input type="checkbox"/> Edit
	<a href="#">Department Contacts</a>	11/09/15 11:25 AM	<input type="checkbox"/> Edit
	<a href="#">Badge Photo</a>	11/03/15 10:06 AM	<input type="checkbox"/> Edit

The sections below have more information on how to use the controls for the top portion of the Docs tab.

### Open or Print Documents

In many cases you can just click on a document's file name to open the document. Your web browser will launch the program it needs to open the document. In some cases your web browser's settings are not configured to recognize the file type so the file will not open. In this case, you will either need to change your web browser's settings so that it associates the correct program with the file extension, or you can often save the document to your local computer and open it from the saved location. The Save Documents Locally section of this help topic shows how to do this.

Once the document has been opened with the appropriate program, you can send it to your local printer by using the print feature in whatever program you're using.

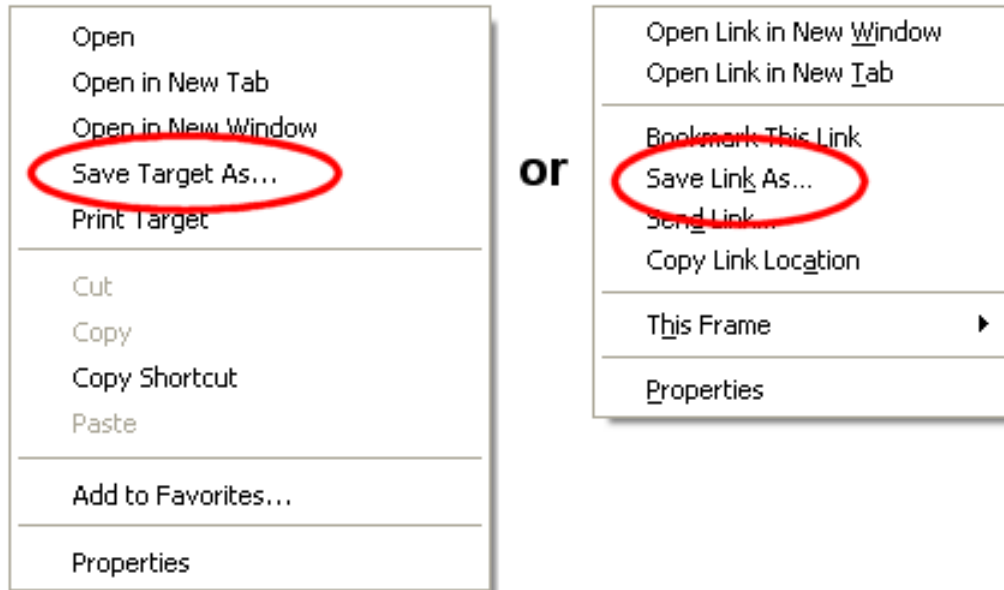
Many web browsers are using built-in PDF viewers now instead of the

Adobe Reader

program. This can also cause trouble with opening PDF documents. In this case you may need to disable the built-in viewer if you do not want to save the file locally. You can find more information on how to do this in [help topic 2176 \[pg:1606\]](#).

## Save Documents Locally

You can save uploaded documents to your local computer (flash drive or other storage medium) without opening the file if you wish. To do this, right-click on the name of the document and then select "Save target as...", "Save link as..." or "Save as..." from the prompt.



## Rename Documents

You can change the name that shows for an uploaded document if you'd like. To do this, click the **Edit** button on the right side of the row where the document appears. An *Edit Document* box will pop up. Edit or replace the document's title and click the **Save** button to keep your changes. Click the **Cancel** button to close the window without changing the document's name.

## Delete Documents

To delete uploaded documents, check the box in the column on the left side by each document you want to delete. If you want to delete all of the documents on the page, scroll down to the bottom of the Documents section and click the **Check all** button. Once the documents you want to delete are marked, click the **Delete** button. A pop-up will appear to make sure you want to completely delete the documents. Click the **OK** button to proceed or the **Cancel** button if you changed your mind and you would like to keep the documents.

*There is not a way to recover documents after they have been deleted so please make sure you want to delete the documents before you proceed.*

## The Delete button does not appear . . .

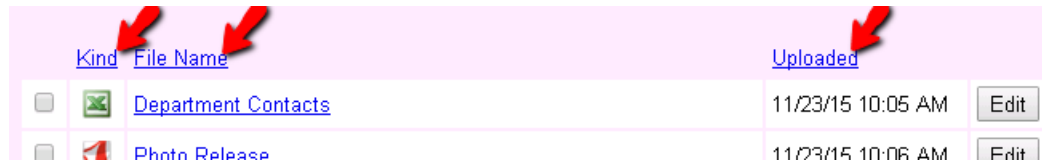
If the

**Delete**

button does not appear on the Docs tab it means one of two things. There are either no documents uploaded for the Coordinator yet, or your [System Operator \[pg:0065\]](#) rights do not allow you to delete documents. Your operator rights are controlled by the [Administrator \[pg:0052\]](#) of your Volgistics account as shown in [help topic 2553 \[pg:1319\]](#).

## Sorting Documents

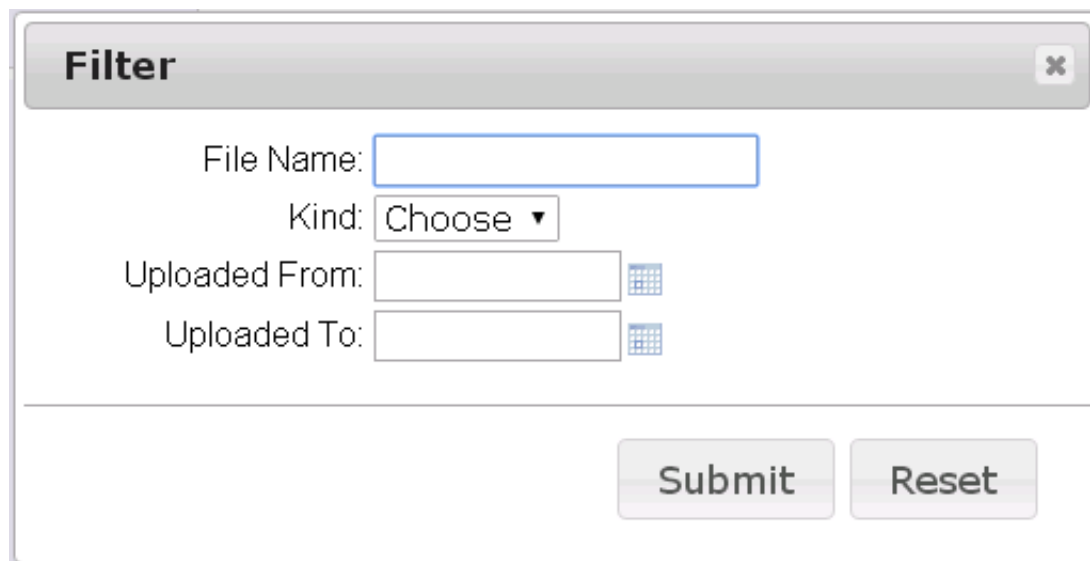
By default the Docs tab is sorted according to the order the documents were added to your database. The most recently added documents will be at the top. You can change the view to be sorted by the *Kind*, *File Name* or *Uploaded* column instead. Just click on a column heading to sort the view based on that column's information.



	Kind	File Name	Uploaded	
<input type="checkbox"/>		<a href="#">Department Contacts</a>	11/23/15 10:05 AM	<input type="button" value="Edit"/>
<input type="checkbox"/>		<a href="#">Photo Release</a>	11/23/15 10:06 AM	<input type="button" value="Edit"/>

## Filtering Documents

You can filter the Docs tab to only show certain documents. To do this, click the **Filter** button in the top left corner. This will open a dialogue box where you can select the filter options.



### Filter

File Name:

Kind:

Uploaded From:

Uploaded To:

There is more information on how each item works below. Please note that you can use more than one option at the same time to refine the documents shown. The filtered view will only show documents that meet all of the requirements you select.

**File Name:** Type the first part of the first word in the name of the file(s) you want to see. The more characters you enter, the more refined the filter will be.

**Kind:** Use the dropdown to select which type of document files you want to have shown.

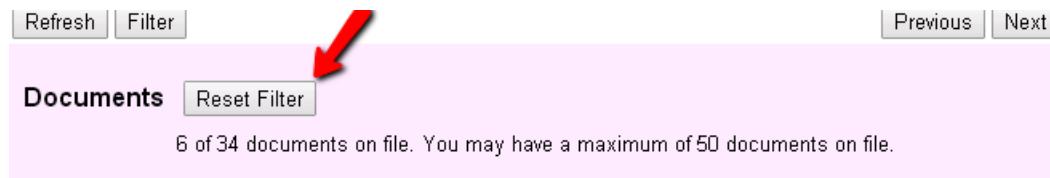
**Uploaded From:** Enter a date to limit the Docs tab to just documents uploaded on or after a certain date.

**Uploaded To:** Enter a date to limit the Docs tab to just documents uploaded on or before a certain date.



## Resetting the Filter

If your view of the Docs tab is currently filtered, there will be a **Reset Filter** button to the right of the word *Documents* at the top left of the page.



Click the **Reset Filter** button to return the Docs tab to the un-filtered view.

## Uploading Documents

The bottom section of the Docs tab is titled *Upload* and it is where you can upload documents for the Coordinator.

### Upload

Upload new PDF, Word, Text, XLS documents or images.

*We recommend optimizing your PDF documents before uploading to make the most of your storage space. Click [here](#) for more information.*

### IMPORTANT

Please remember that Volgistics is not HIPAA compliant, and should not be used to store protected health information. Click [here](#) for more information.

#### Step 1

Click the choose file button to select the file you want to upload.

No file chosen

#### Step 2

Click the Upload button to start uploading.

The sections below have more information on how to use the controls for the bottom portion of the Docs tab.

## The Upload section does not appear . . .

If you do not see the Upload section at the bottom of the Docs tab, one of the following applies:

1. The **VicDocs** [pg:1648] module is not included in your account's **service level** [pg:0719]. In this case, the service level will need to be changed to **include VicDocs** [pg:0050].
2. Your **System Operator** [pg:0065] rights do not include the right to upload documents to this tab. In this case, you will need to contact your account's **Administrator** [pg:0052] to have him or her **change your operator rights** [pg:1319] for the tab.

3. The Docs tab has reached its capacity. In this case, you will need to delete older documents in order to upload new documents.

## File Types

The following file types can be uploaded for Coordinators:

File Type	File Extension(s)
Image	.bmp, .gif, .jpeg, .jpg, .png
Microsoft Excel	.xls, .xlsx
Microsoft PowerPoint	.ppt, .pptx
Microsoft Word	.doc, .docx
Portable Document Format (PDF)	.pdf
Text	.rtf, .txt

## Capacity and File Size

The Docs tab can hold up to 50 electronic document files that are 10 megabytes (10,485,760 bytes) or smaller. There is not a way to upload over 50 documents, or upload files larger than 10 megabytes. If you have reached the 50 file limit, older files can be deleted. If a file is over the size limit, you can optimize or compress the file to make it smaller.

## Optimizing or Compressing Files

Before uploading larger files, we recommend optimizing or compressing the file first. This reduces the file size, which means it will upload, open and transfer faster. Optimization and compression usually apply only to image and PDF [pg:0449] files. Generally the program used to create the file will have features that allow you to optimize or compress the file.

We found these resources on how to optimize PDF files using some common programs:

- If you use Microsoft Word and the "Save as" function to save in the PDF format, select "Minimum Size (publishing online)" as the "Optimize for" option. More information.
- If you use Adobe Acrobat, use the PDF Optimizer under the Advanced menu. More information.
- If you use a Nuance program (such as PDF Converter Pro or PDF Converter Enterprise), select Tools then "Optimize PDF." More information.

You may need to search the Internet, or refer to the help documentation for the program you use, for more information on how to reduce the file's size.

## Uploading Files

You can upload files to the Docs tab by:

1. Click the **Choose File** or **Browse** button.
2. Select the file to upload and click the **Open** button. You can find acceptable file types here.
3. Click the **Upload** button. Once the upload is complete, your document will be listed in the Documents section of the Docs tab.

## Document Storage and HIPAA

Please keep in mind that Volgistics is designed to be a

*volunteer*

management system. As such it is

*not*

intended to be used to store, process or transmit HIPAA protected information so it is not a Covered Entity for HIPAA regulations. There is more information on this in [help topic 8273 \[pg:0091\]](#).

### Virus Scanning

To protect the system and your account, Volgistics automatically scans documents for possible viruses before making the document available. You will see a "(waiting to be scanned)" message after the document's name while this is being done, and the document's name will not be a clickable link. In some cases, you will need to click the **Refresh** button in the top or bottom left corner to have the tab update after the scan has been completed.

If a virus is found on a document, it will be removed from the system and an alert will be sent to the [In Box \[pg:0303\]](#) of your Volgistics mailbox.

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## Docs Tab (Site, Place or Assignment Record)

Help topic 2550

Added or revised 11-23-2015

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The Docs tab is the last tab on the right hand side of [Site, Place, and Assignment \[pg:0096\]](#) records. It is used to store electronic documents uploaded for the Site, Place, or Assignment using the [VicDocs \[pg:1648\]](#) feature. If you are not able to see the tab, one (or both) of the following apply:

1. Your [System Operator \[pg:0065\]](#) rights do not allow access to the tab. You will need to contact your account's [Administrator \[pg:0052\]](#) for further assistance in this case.
2. Your account's [service level \[pg:0719\]](#) does not include VicDocs. You can find information about adding VicDocs to your service level in [help topic 2007 \[pg:0050\]](#).

This help topic reviews some of the basic features of the Docs tab. You can click on an item in the *Contents* box below to go directly to that section of the help topic.

### Contents

[Stored Documents](#)

[Open or Print Documents](#)

[Save Documents Locally](#)

[Rename Documents](#)

Delete Documents  
Sorting Documents  
Filtering Documents  
Resetting the Filter

### Uploading Documents

File Types  
Capacity and File Size  
Optimizing or Compressing Files  
Uploading Files  
Document Storage and HIPAA  
Virus Scanning

### **Stored Documents**

The top section of the Docs tab is titled *Documents* and it is where you will see documents that have been uploaded for the Site, Place, or Assignment.

## North Lobby Desk

	Kind	File Name	Uploaded	
<input type="checkbox"/>		<a href="#">Volunteer PIN's</a>	11/23/15 11:59 AM	<input type="button" value="Edit"/>
<input type="checkbox"/>		<a href="#">Weekly Announcements</a>	11/18/15 10:09 AM	<input type="button" value="Edit"/>
<input type="checkbox"/>		<a href="#">Policy &amp; Procedure Manual</a>	11/03/15 4:13 PM	<input type="button" value="Edit"/>
<input type="checkbox"/>		<a href="#">Admin. Staff Photo</a>	10/29/15 3:58 PM	<input type="button" value="Edit"/>

The sections below have more information on how to use the controls for the top portion of the Docs tab.

### **Open or Print Documents**

In many cases you can just click on a document's file name to open the document. Your web browser will launch the program it needs to open the document. In some cases your web browser's settings are not configured to recognize the file type so the file will not open. In this case, you will either need to change your web browser's settings so that it associates the correct program with the file extension, or you can often save the document to your local computer and open it from the saved location. The Save Documents Locally section of this help topic shows how to do this.

Once the document has been opened with the appropriate program, you can send it to your local printer by using the print feature in whatever program you're using.

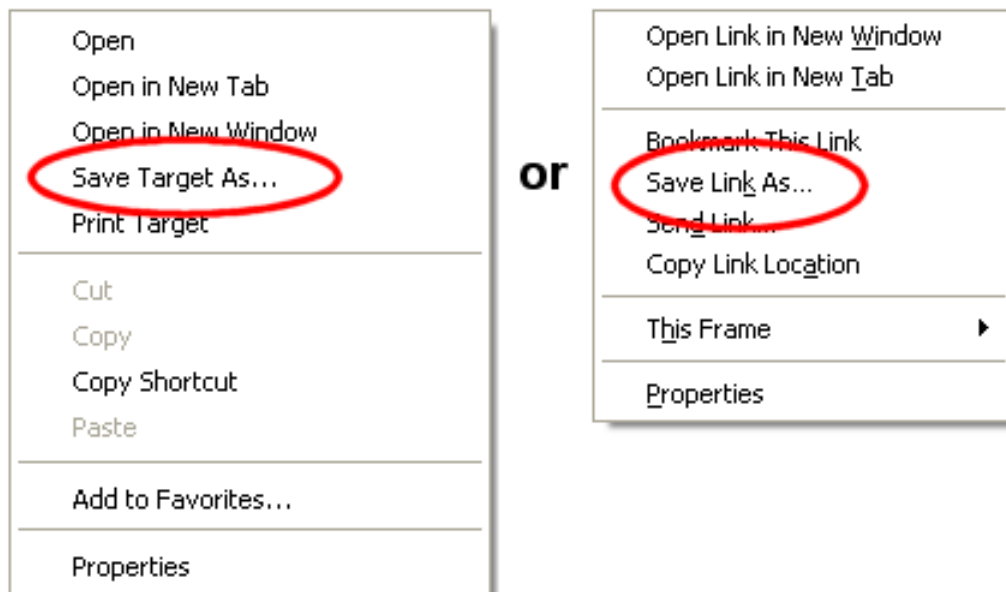
Many web browsers are using built-in PDF viewers now instead of the

Adobe Reader

program. This can also cause trouble with opening PDF documents. In this case you may need to disable the built-in viewer if you do not want to save the file locally. You can find more information on how to do this in [help topic 2176 \[pg:1606\]](#).

### Save Documents Locally

You can save uploaded documents to your local computer (flash drive or other storage medium) without opening the file if you wish. To do this, right-click on the name of the document and then select "Save target as...", "Save link as..." or "Save as..." from the prompt.



### Rename Documents

You can change the name that shows for an uploaded document if you'd like. To do this, click the **Edit** button on the right side of the row where the document appears. An *Edit Document* box will pop up. Edit or replace the document's title and click the **Save** button to keep your changes. Click the **Cancel** button to close the window without changing the document's name.

### Delete Documents

To delete uploaded documents, check the box in the column on the left side by each document you want to delete. If you want to delete all of the documents on the page, scroll down to the bottom of the Documents section and click the **Check all** button. Once the documents you want to delete are marked, click the **Delete** button. A pop-up will appear to make sure you want to completely delete the documents. Click the **OK** button to proceed or the **Cancel** button if you changed your mind and you would like to keep the documents.

*There is not a way to recover documents after they have been deleted so please make sure you want to delete the documents before you proceed.*

## The Delete button does not appear . . .

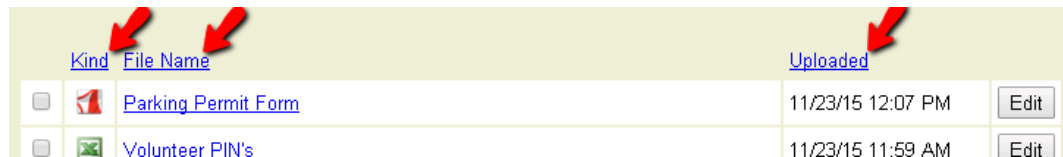
If the



### Delete

button does not appear on the Docs tab it means one of two things. There are either no documents uploaded for the Site, Place, or Assignment yet, or your [System Operator \[pg:0065\]](#) rights do not allow you to delete documents. Your operator rights are controlled by the [Administrator \[pg:0052\]](#) of your Volgistics account as shown in [help topic 2553 \[pg:1319\]](#).

### Sorting Documents

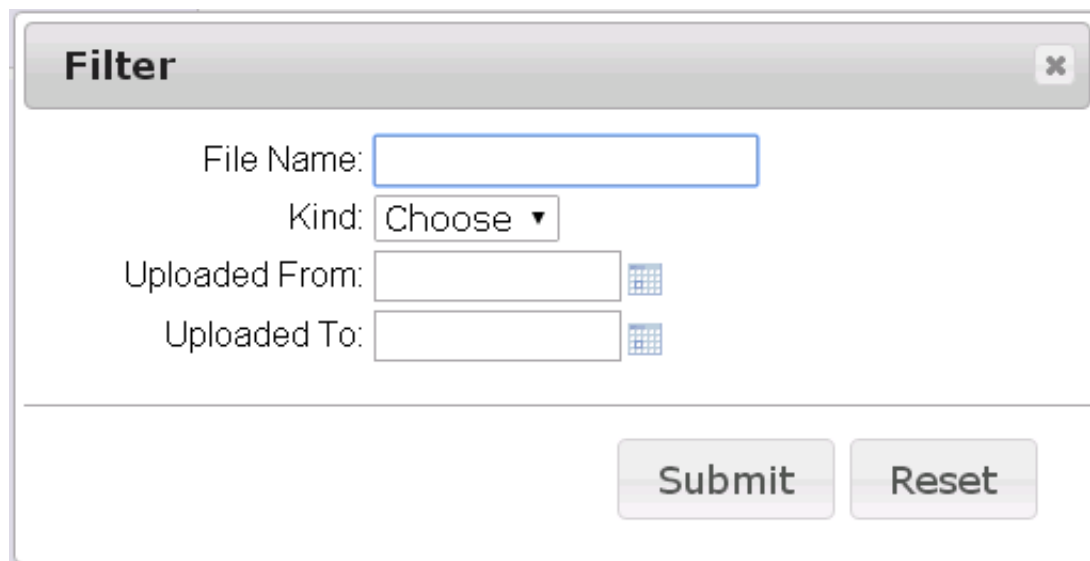
By default the Docs tab is sorted according to the order the documents were added to your database. The most recently added documents will be at the top. You can change the view to be sorted by the *Kind*, *File Name* or *Uploaded* column instead. Just click on a column heading to sort the view based on that column's information.



<a href="#">Kind</a>	<a href="#">File Name</a>	<a href="#">Uploaded</a>	
<input type="checkbox"/>	 <a href="#">Parking Permit Form</a>	11/23/15 12:07 PM	<input type="button" value="Edit"/>
<input type="checkbox"/>	 <a href="#">Volunteer PIN's</a>	11/23/15 11:59 AM	<input type="button" value="Edit"/>

### Filtering Documents


You can filter the Docs tab to only show certain documents. To do this, click the **Filter** button in the top left corner. This will open a dialogue box where you can select the filter options.




### Filter

File Name:

Kind:

Uploaded From:  

Uploaded To:  

There is more information on how each item works below. Please note that you can use more than one option at the same time to refine the documents shown. The filtered view will only show documents that meet all of the requirements you select.

**File Name:** Type the first part of the first word in the name of the file(s) you want to see. The more characters you enter, the more refined the filter will be.

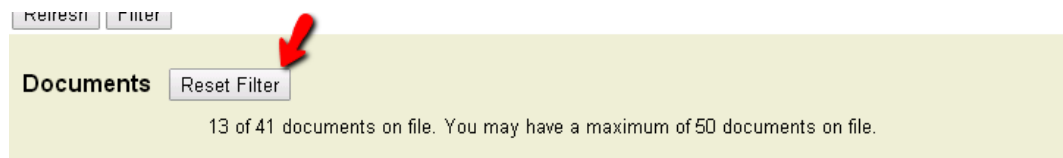
**Kind:** Use the dropdown to select which type of document files you want to have shown.

**Uploaded From:** Enter a date to limit the Docs tab to just documents uploaded on or after a certain date.

**Uploaded To:** Enter a date to limit the Docs tab to just documents uploaded on or before a certain date.

### Resetting the Filter

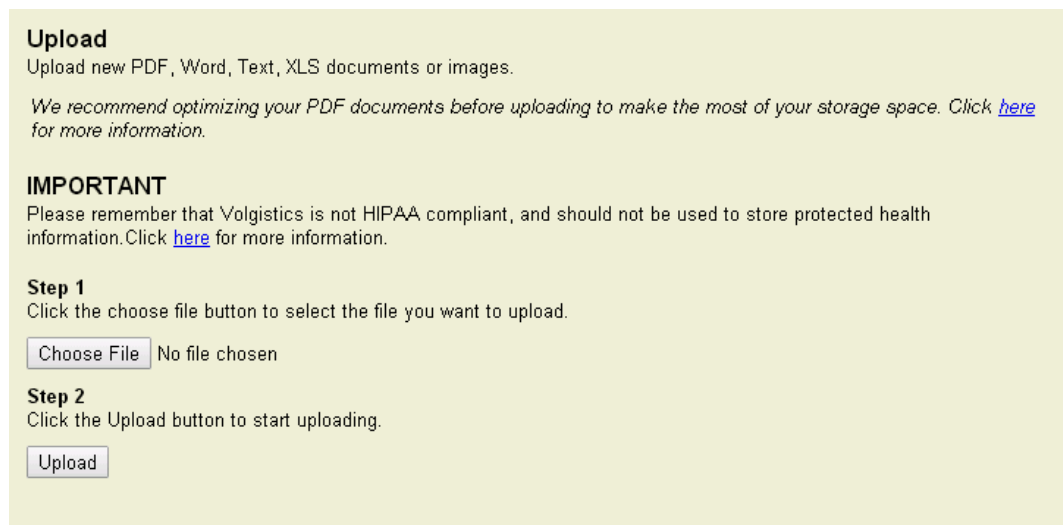
If your view of the Docs tab is currently filtered, there will be a **Reset Filter** button to the right of the word *Documents* at the top left of the page.



Click the **Reset Filter** button to return the Docs tab to the un-filtered view.

### Uploading Documents

The bottom section of the Docs tab is titled *Upload* and it is where you can upload documents for the Site, Place, or Assignment.



The sections below have more information on how to use the controls for the bottom portion of the Docs tab.

### The Upload section does not appear . . .

If you do not see the Upload section at the bottom of the Docs tab, one of the following applies:

1. The [VicDocs \[pg:1648\]](#) module is not included in your account's [service level \[pg:0719\]](#). In this case, the service level will need to be changed to [include VicDocs \[pg:0050\]](#).
2. Your [System Operator \[pg:0065\]](#) rights do not include the right to upload documents to this tab. In this case, you will need to contact your account's [Administrator \[pg:0052\]](#) to have him or her [change your operator rights \[pg:1319\]](#) for the tab.
3. The Docs tab has reached its capacity. In this case, you will need to delete older documents in order to upload new documents.

## File Types

The following file types can be uploaded for a Site, Place, or Assignment:

File Type	File Extension(s)
Image	.bmp, .gif, .jpeg, .jpg, .png
Microsoft Excel	.xls, .xlsx
Microsoft PowerPoint	.ppt, .pptx
Microsoft Word	.doc, .docx
Portable Document Format (PDF)	.pdf
Text	.rtf, .txt

## Capacity and File Size

The Docs tab can hold up to 50 electronic document files that are 10 megabytes (10,485,760 bytes) or smaller. There is not a way to upload over 50 documents, or upload files larger than 10 megabytes. If you have reached the 50 file limit, older files can be deleted. If a file is over the size limit, you can optimize or compress the file to make it smaller.

## Optimizing or Compressing Files

Before uploading larger files, we recommend optimizing or compressing the file first. This reduces the file size, which means it will upload, open and transfer faster. Optimization and compression usually apply only to image and [PDF \[pg:0449\]](#) files. Generally the program used to create the file will have features that allow you to optimize or compress the file.

We found these resources on how to optimize PDF files using some common programs:

- If you use Microsoft Word and the "Save as" function to save in the PDF format, select "Minimum Size (publishing online)" as the "Optimize for" option. More information.
- If you use Adobe Acrobat, use the PDF Optimizer under the Advanced menu. More information.
- If you use a Nuance program (such as PDF Converter Pro or PDF Converter Enterprise), select Tools then "Optimize PDF." More information.

You may need to search the Internet, or refer to the help documentation for the program you use, for more information on how to reduce the file's size.

## Uploading Files

You can upload files to the Docs tab by:



1. Click the **Choose File** or **Browse** button.
2. Select the file to upload and click the **Open** button. You can find acceptable file types here.
3. Click the **Upload** button. Once the upload is complete, your document will be listed in the Documents section of the Docs tab.

## Document Storage and HIPAA

Please keep in mind that Volgistics is designed to be a

*volunteer*

management system. As such it is

*not*

intended to be used to store, process or transmit HIPAA protected information so it is not a Covered Entity for HIPAA regulations. There is more information on this in [help topic 8273 \[pg:0091\]](#).

## Virus Scanning

To protect the system and your account, Volgistics automatically scans documents for possible viruses before making the document available. You will see a "(waiting to be scanned)" message after the document's name while this is being done, and the document's name will not be a clickable link. In some cases, you will need to click the **Refresh** button in the top or bottom left corner to have the tab update after the scan has been completed.

If a virus is found on a document, it will be removed from the system and an alert will be sent to the [In Box \[pg:0303\]](#) of your Volgistics mailbox.

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## VicDocs

Help topic 3019

Added or revised 02-11-2016

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VicDocs is an optional Volgistics module used to upload and store electronic documents. You do not need to include VicDocs in your account's [service level \[pg:0719\]](#) to use Volgistics. However, if you do include VicDocs, the module provides paperless storage and management for documents associated with your organization.

This help topic answers many common questions about the VicDocs feature. You can click on a question in the *Contents* box below to go directly to the answer to that question.

### Contents

Why is it called VicDocs?

Where can documents be uploaded?

What types of documents can be uploaded?

How many documents can be uploaded?

How big can the document files be?  
 Who can upload documents?  
 Who can access or view documents?  
 What happens to documents when a volunteer record is archived or an Assignment is made inactive?  
 What happens to documents if a record is deleted?  
 What happens to documents if an account is cleared or cancelled?  
 How can I find the price for adding VicDocs to my account's service level?  
 How do I get started with VicDocs?

### Why is it called VicDocs?

Vic stands for *Volunteer Information Center* and *Documents* (or Docs) are what the module stores and manages. Thus, the name *VicDocs*.

The name keeps the nomenclature used for the other Volgistics modules: *VicNet* and *VicTouch*. *VicNet* [pg:1724] is the optional module volunteers and *Coordinators* [pg:0163] use to interact with Volgistics from any Internet connected computer or device. *VicTouch* [pg:1778] is the optional module that uses an on-site touchscreen to track volunteer service. Volunteers sign-in and out with the module similar to how employees use a time clock to track the time they have worked.

### Where can documents be uploaded?

When VicDocs is included in your account's *service level* [pg:0719], you will be able to upload electronic document files to five (5) different types of records. You will be able to upload documents to *volunteer records*, *Coordinator* [pg:1849] records, as well as *Site, Place and Assignment* [pg:0096] *Coordinator* [pg:1849] records, as well as S

When VicDocs has been added, a Docs tab will be available as the last tab on the right side for each record type listed above.

## North Lobby Desk

The screenshot shows a web interface for 'North Lobby Desk'. At the top, there are several tabs: Assignment, Coordinators, Profile, Description, Volunteers, Schedule, Rules, and Docs. The 'Docs' tab is selected. Below the tabs are 'Refresh' and 'Filter' buttons. The main content area is titled 'Documents' and contains the text: '4 documents on file. You may have a maximum of 50 documents on file.' Below this is a table with columns for 'Kind', 'File Name', and 'Uploaded'. Each row has a checkbox on the left and an 'Edit' button on the right.

Kind	File Name	Uploaded
<input type="checkbox"/>	<a href="#">Volunteer PIN's</a>	11/23/15 11:59 AM
<input type="checkbox"/>	<a href="#">Weekly Announcements</a>	11/18/15 10:09 AM
<input type="checkbox"/>	<a href="#">Policy &amp; Procedure Manual</a>	11/03/15 4:13 PM
<input type="checkbox"/>	<a href="#">Admin. Staff Photo</a>	10/29/15 3:58 PM

At the bottom of the document list, there are 'Check all' and 'Un-check all' buttons. Below these is a message: 'Click Delete to delete the **checked** documents:' followed by a 'Delete' button.

### What types of documents can be uploaded?

The actual content of the documents you upload will vary depending on your organization's needs. For example, some organizations may need volunteers to keep a signed photo release on file, while others may need a copy of a completed parking permit form.

Because of this variety, Volgistics allows document uploads to have a number of different file formats (or extensions). The table below shows acceptable file formats:

File Type	File Extension(s)
Image	.bmp, .gif, .jpeg, .jpg, .png
Microsoft Excel	.xls, .xlsx
Microsoft PowerPoint	.ppt, .pptx
Microsoft Word	.doc, .docx
Portable Document Format (PDF)	.pdf
Text	.rtf, .txt

## Document Storage and HIPAA

Please keep in mind that Volgistics is designed to be a

*volunteer*

management system. As such it is

*not*

intended to be used to store, process or transmit HIPAA protected information so it is not a Covered Entity for HIPAA regulations. There is more information on this in [help topic 8273 \[pg:0091\]](#).

## How many documents can be uploaded?

The VicDocs module allows you to store fifty (50) documents on the Docs tab of each record type mentioned in the [Where can documents be uploaded?](#) section above. Because of this, the maximum number of documents you can store in your account varies depending on how many records you have. For example, if you have 100 non-archived volunteer records, 50 archived volunteer records, 1 Site record, 4 Place records, 25 Assignment records, and 20 Coordinator records, you have a total of 200 records where documents can be uploaded. Each of these record types can have a maximum of 50 documents uploaded to the Docs tab so your account can have 10,000 (200 x 50) documents. If you add 5 new Assignment records, you will now have 205 records where documents can be uploaded. This will make the maximum number of documents your account can hold increase to 10,250.

You can learn more about the Docs tab on each record type in the following help topics:

[Help topic 2548 \[pg:1630\]](#) - Docs tab (Volunteer Record)

[Help topic 2549 \[pg:1636\]](#) - Docs tab (Coordinator Record)

[Help topic 2550 \[pg:1642\]](#) - Docs tab (Site, Place or Assignment Record)

## How big can the document files be?

Document files must be 10 megabytes (10,485,760 bytes) or smaller. In many cases, larger files can be optimized or compressed to reduce their size. You can find more information on this in the help topics related to the Docs tabs.

### **Who can upload documents?**

Documents can only be uploaded by your account's [System Operators \[pg:0065\]](#). The [Administrator \[pg:0052\]](#) for each account controls which operators can, or cannot, upload documents to the Docs tab of each record type. [Help topic 2553 \[pg:1319\]](#) shows how Administrators control the operator's rights.

### **Who can access or view documents?**

Similarly to uploading documents, uploaded Documents can only be accessed or viewed by your account's [System Operators \[pg:0065\]](#). Again, the [Administrator \[pg:0052\]](#) for each account controls which operators can, or cannot, see the Docs tabs where the records are stored. [Help topic 2553 \[pg:1319\]](#) shows how Administrators control the operator's rights.

### **What happens to documents when a volunteer record is archived or an Assignment record is made inactive?**

In Volgistics, a record for a volunteer who is no longer actively serving can be stored in the [archived \[pg:0709\]](#) section of the account. Similarly, if an Assignment is no longer needed, you can make the [Assignment inactive \[pg:0140\]](#). Both of these options allow you to keep the basic information for the record, but remove the volunteer or Assignment from the regular view. When you do this, all documents uploaded for the volunteer or Assignment are still available to you, but you may need to take extra steps to access the documents.

If you [restore a volunteer record \[pg:1852\]](#) to the non-archived section, or make an inactive Assignment active again, the documents will be available again without taking extra steps.

### **What happens to documents if a record is deleted?**

When a [System Operator \[pg:0065\]](#) deletes a record (or records) where documents are uploaded, the operator will see a choice to save the documents uploaded for the record(s). If they opt to save the documents, the documents will be placed in a zip file that will be available on the [In Box \[pg:0303\]](#) tab of the Volgistics Mailbox. The zip files of downloaded documents will be available for five days so they can be saved locally. After the five days pass, the zip files of documents will be permanently deleted from the account.

### **What happens to documents if an account is cleared or cancelled?**

If an account's [Administrator \[pg:0052\]](#) opts to [clear an account \[pg:0890\]](#), the same basic procedure that happens when

records are deleted

occurs. The Administrator will see an option to save the documents and the saved documents will be placed in a zip file that will be available on the [In Box \[pg:0303\]](#) tab of the Volgistics Mailbox for five days.

If an [Administrator \[pg:0052\]](#) opts to [cancel an account \[pg:0894\]](#), the Administrator will see an option to save the documents. In this case, a link to the zip file containing the documents will be sent to the Administrator's email address. The Administrator will need to enter her or his password after clicking the link if she or he wishes to save the documents locally. This link will only stay active for 5 days and then the documents will be permanently deleted.

## How can I find out the price for adding VicDocs to my account's service level?

Because of added expenses such as equipment and increased bandwidth, adding VicDocs to your organization's [service level \[pg:0719\]](#) will increase your monthly service fee. However, Volgistics strived to keep the added expense for this to a minimum. You can use the Volgistics Price Calculator to determine what your organization's monthly service fee will be if you add VicDocs. If you do not know your account's current service level, find this first by:

1. Select [Setup \[pg:0887\]](#) from the menu.
2. Expand the *Account management* link.
3. Select *Account status*.

Note the settings for each item in the *Service Level* section, and then click here to go to the Price Calculator. Select the settings for your account's service level and then add the VicDocs module. The calculator will show what the monthly service fee for your account will be if VicDocs is included.

## How do I get started with VicDocs?

If you're ready to get started with VicDocs, just follow the steps in [help topic 2547 \[pg:1629\]](#) - "Getting Started with VicDocs."

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## VicNet for People Who Are Both a Volunteer and a Coordinator

Help topic 1093

Added or revised 04-26-2016

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As you can read about [here \[pg:1707\]](#), you can make [VicNet \[pg:1724\]](#) accessible to any volunteer or coordinator you track in Volgistics. However, there may be individuals in your Volgistics system who serve as both volunteers and coordinators. It is likely that these people have a volunteer record and a coordinator record. When such people use VicNet, the email address(es) and VicNet password(s) stored in their records become important.

### **When the email address in the volunteer record differs from the email address entered in the coordinator record**

If a separate email address is entered for each responsibility, then the person must use the email address in their volunteer record to login to VicNet as a volunteer and the email address stored in their coordinator record to login to VicNet as a coordinator. VicNet will display the correct information (volunteer or coordinator) based on the email address used to login. The person would need to logout of VicNet and then back in with the other email address to see the information pertaining to their other responsibility.

### **When the password on the Vic tab in the volunteer record differs from the password on the Vic tab in the coordinator record**

Much like having different email addresses in each record, having different passwords can determine which screen (volunteer or coordinator) a person will see upon logging into VicNet. If the emails in both the volunteer and coordinator records match, but the volunteer Vic tab includes a password of 'xxxxxx' and the coordinator Vic tab includes a password of 'yyyyyy,' the volunteer would login to VicNet with their (only) email, and choose the password that applies to the information they wish to view and manage.

### **When both the email address and password are unique to the record**

If the person's volunteer record contains one email address and password and their coordinator record contains a different email address *and* a different password, they simply use one set of login information to access VicNet as a volunteer and the other set to login as a coordinator.

### **When both email address and passwords are the same in each record**

If the person's VicNet login credentials are the same in their volunteer record and coordinator record, they login to VicNet normally. VicNet will then prompt them to choose which record they would like to access.



Login

### Which record?

Your login name and password provide access to multiple records. Choose which record you want to login to.

Choose one:

- George Bailey (volunteer)
- George Bailey (coordinator)

Go

---

## How to Use VicNet: a Brief Guide for Volunteers

Help topic 1148

Added or revised 03-23-2017

---

*This help topic is intended to help volunteers better understand how to use the VicNet module.*

If you prefer a video tutorial format instead of the written help topic, the following videos explain more about how to use VicNet. Each video shows a different way an organization may have VicNet setup. Choose the video that matches your organization's VicNet setup the closest.

The VicNet module is a tool the organization you volunteer with may use. You access the VicNet module over the Internet and you can use it to:

- View and manage your schedule
- Sign-up for vacant schedule openings
- Print your schedule
- Keep your personal information up-to-date
- Post your hours
- Receive news and messages from the volunteer office
- Check your service records, and print your own service reports
- Change your VicNet password
- Opt-in or out of text messaging and update your message preferences

Each organization sets up VicNet according to what works best for their needs--so you may not be able to do everything listed above. This will depend on how your organization opted to use the features.

You can click on a link in the *Contents* box below to go directly to a section in the help topic.

### Contents

[Logging into VicNet](#)

[Navigating VicNet](#)

[Home Tab](#)

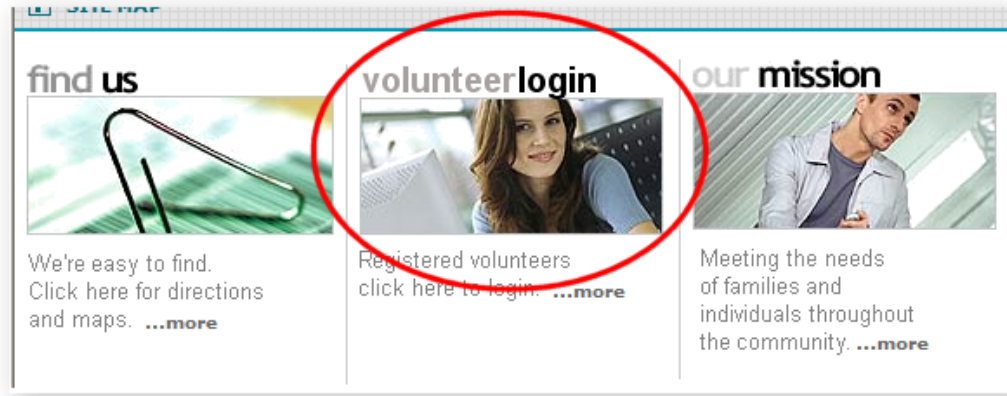
- Mail Tab
- My Profile Tab
- My Schedule Tab
- My Service History Tab
- Time Sheet Tab
- Account Tab

**Logging into VicNet**

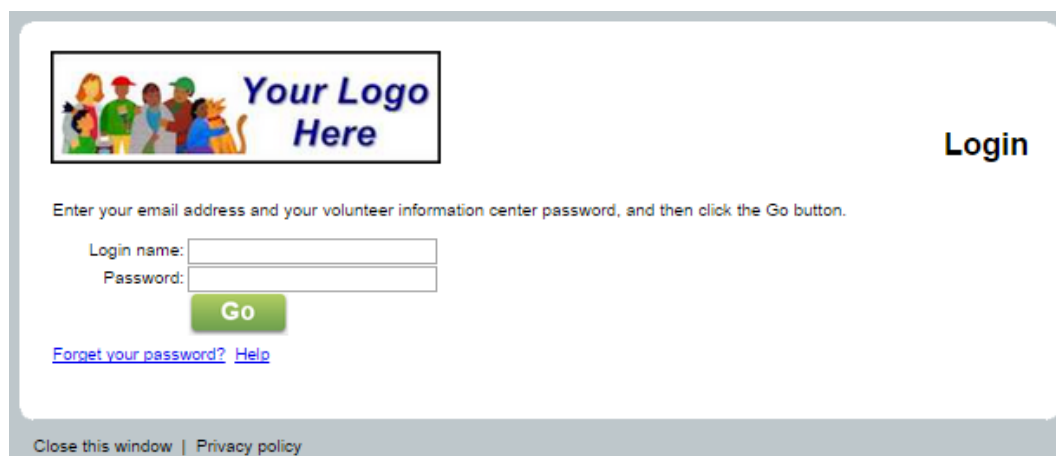
In most cases, you get to your organization's VicNet login page through the organization's website. An organization may choose to send you a URL address that you can use to login, but most of the time there will be a link to the VicNet login page somewhere on the organization's website. It may be a simple text link like this:

[Volunteer Login](#)

Or, it may be a graphic link like this:



Your organization should provide you with directions on how to locate the webpage you will need to use to login. When you click on the link (or go to the URL address your organization provides you with) you will see a login page similar to this one:





Enter the email address your organization has on file for you in the *Login name* field. If you do not know this email address, you will need to contact the organization you volunteer with for more information.

Enter your password in the *Password* field and then press the **Go** button.

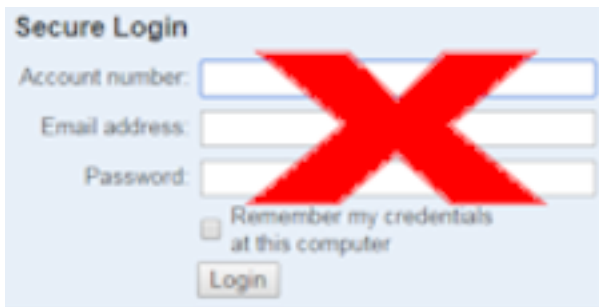
In most cases, you will receive a link to set your password in an email message from your organization. You follow the link to create the password you will use to login with.

In other cases, your organization may have set a temporary password for your record and let you know the temporary password. If your volunteer record was imported from another software program, your previous password may be the temporary password. When you login with the temporary password, you will need to enter a permanent password on the Account tab before you can go to other tabs. Remember the permanent password you select because you will need to use it the next time you login. You can find more information on the Account tab in the Account Tab section below.

One other thing that may occur is that your organization asked you to select a password when you filled out your application form. In this case, you use this password to login with and you will not need to go to the Account tab to select a permanent password the first time you login.

If you forget your password, or are not able to locate any password information from your organization, click the *Forget your password?* link that appears on the login screen. As long as the email address you enter matches the address on your volunteer record, this will send an email with a password link to you. You can follow this link to set a password to login with. **Please note that the password links only remain active for 24 hours. If you click on the link but it has expired, just click the *Forget your password?* link again to have a new link sent.**

You can find more information on how to use the *Forget your password?* link [here \[pg:1975\]](#).



The image shows a 'Secure Login' form with the following fields: 'Account number', 'Email address', and 'Password'. Below the password field is a checkbox labeled 'Remember my credentials at this computer' and a 'Login' button. A large red 'X' is superimposed over the form, indicating that the login attempt failed or the form is invalid.

## Navigating VicNet

All tabs in VicNet are highly customizable by individual organizations. Therefore, it is difficult to say exactly what type of content will be displayed on the various tabs, or even if a tab will be visible to you at all. The following information explains the basic purpose of each tab that can be displayed and provides visual examples of how the tab might look. Your view in VicNet may be different depending on how the organization you volunteer with has setup their VicNet module.

### The Home tab

The first tab displayed when you login is the Home tab. The following image is an example of what a VicNet Home tab might look like:

**Your Logo Here**

## Volunteer Information Center

Volunteer information for **Andrea Campbell**

Home | Mail | My Profile | My Schedule | My Service History | Time Sheet | Account

**Check your schedule**

**Post your hours**

**Check messages**

**Sign-up**

**Statistics**  
Overall  
Volunteers: 165  
Cumulative hours of service: 0:00 (as of yesterday)

**Volunteer Forms**  
Click the name of the form to print it from your home computer. Remember to drop off the completed form at the Volunteer Services office. Please stop by Volunteer Services if you're unable to print the form.  
[Background Check Release Form](#)  
[Parking Permit Application Form](#)

**News**  
Welcome to the Volunteer Information Center. This new online feature gives you an easy way to keep-in-touch with the volunteer program. You can check your schedule, post your volunteer service, receive messages, and much more: anytime, and from any Internet connected computer.  
Watch this space for more volunteer news!

**Your Assignments**  
Welcome Center Desk (Assigned) [More...](#)

**VicNet Training Video**  
If you are new to VicNet, please click the link below to watch a short training video.

**VicTouch Training Video**  
When you arrive for duty, you will sign-in using VicTouch. If you are new to VicTouch, please click the link below to watch a short training video.

**Coordinator Training Video**  
If you're a new Coordinator, please click the link below to watch a short training video.

**Exit**

Close this window | Privacy policy

From the Home tab, you can access any of the other available tabs, or click on any buttons or links your organization has chosen to include. Depending on how your organization has VicNet setup, you may see news from your organization; links to documents that you can view, print or download; or links to other web sites with resources you may need.

### The Mail tab

The Mail tab in VicNet is where you can see messages (called Vic Mail) sent to you from the person who coordinates volunteers for your organization. New messages appear on top, and a list of read messages appears on the bottom. To read a message, click on the Subject of the message.

Here is an example of what a VicNet Mail tab might look like:



## Volunteer Information Center

### Volunteer information for Andrea Campbell

[Home](#) [Mail](#) [My Profile](#) [My Schedule](#) [My Service History](#) [Time Sheet](#) [Account](#)

#### Instructions

To view a message, simply click on the message subject.

#### New messages

Subject	Sent
<b>Bedford Falls 10K</b>	09-04-2014
If you haven't heard, we are proud to be a co-sponsor of this year's Bedford Falls 10K run. This event is an important fund raiser for our organization, plus it promotes health and wellness.	
This year's 10K run will be held on Saturday, October 18th at 9:30 am. As a co-sponsor, we will be responsible for staffing the registration booth from 7:00 am - 8:00 pm on Friday, October 17th, as well as from 7:00 am - 9:00 am on the morning of the race.	
Registration booth staff will be responsible for handing out race day packets and t-shirts to registered participants. If you're interested in helping us staff the booth, please call Carol at 555-892-3391.	
Thank you, Carol Luden	

[Close](#)

#### Old Messages

Subject	Sent
New Parking Permit Needed	09-04-2014

[Exit](#)

[Close this window](#) | [Privacy policy](#)

#### The My Profile tab

The My Profile tab lets you see and (if your organization permits) update your personal information. The form sections and fields that appear on the tab are selected by your organization. They can choose to make certain fields required so you need to enter information in them in order to save the page. Or they can make certain fields "read-only" so you can see the information in the field, but you will not be able to change it. Please remember to click the **Save** button if you make any changes.

The following is an example of what the VicNet My Profile might look like:



## Volunteer Information Center

### Volunteer information for Andrea Campbell

[Home](#) [Mail](#) [My Profile](#) [My Schedule](#) [My Service History](#) [Time Sheet](#) [Account](#)

#### Instructions

The following information is currently on file in your volunteer record. To update your records, enter your new information in the spaces provided. Click any of the "Save" buttons to save your changes or additions.

#### Contact Information

First name:   
 Last name:   
 Title:   
 Type:   
 Street 1:   
 Street 2:   
 Street 3:   
 City:   
 State:  Zip:   
 Home phone:   OK to call me here  
 Work phone:   OK to call me here

[Save](#)

#### Photo

Click the Upload link if you would like to upload a photo of yourself.



[Upload](#)

#### Demographics

You may optionally provide the following information. It is used only to help us get a better idea of the demographic make-up of our volunteers.

Date of birth:    (year optional)  
 T-Shirt Size:   
 Ethnicity:

[Save](#)

#### Skills & Experience

In which of these areas do you feel you have moderate to excellent skill? Check all that apply.

Skills & Interests:  Cash Register  Computer - Advanced  Computer - Basic  
 Computer - Intermediate  Data Entry  Diabetes Education  
 Office Work  Patient Assistance  Patient Companionship  
 Spiritual Counseling  Telephone Answering  Writing/Publishing

[Save](#)

#### Availability


Please indicate the days and times you are usually available to volunteer.

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Morning:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Afternoon:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

### The My Schedule tab

Another tab you might see in VicNet is the My Schedule tab. This tab lets you view and print your schedule, in addition to adding or removing yourself from a schedule if your organization allows this.

Your My Schedule tab might appear in a monthly view as shown below:



## Volunteer Information Center

**Volunteer information for Andrea Campbell**

Home
Mail
My Profile
My Schedule
My Service History
Time Sheet
Account

**Instructions**  
 Your regularly scheduled volunteer shifts appear on the calendar. Click the "Next month" or "Previous Month" buttons to view a different month. For a printable view of your schedule click the "Printable view" button.

HELP WANTED

### Sign-Up!

We need volunteers on days that have the 'Help wanted' symbol. Click any of these days to learn more or to sign-up.

Show openings in All my assignments

Schedule yourself for volunteer duty

Prev month
Next month
September 2014

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	1 Labor Day	2 7:00 a - 11:00 a Welcome Center Desk	3 7:00 a - 11:00 a Welcome Center Desk	4 7:00 a - 11:00 a Welcome Center Desk	5 7:00 a - 11:00 a Welcome Center Desk	6
7	8 7:00 a - 11:00 a Welcome Center Desk	9 7:00 a - 11:00 a Welcome Center Desk	10 7:00 a - 11:00 a Welcome Center Desk	11 7:00 a - 11:00 a Welcome Center Desk	12 7:00 a - 11:00 a Welcome Center Desk	13
14	15 7:00 a - 11:00 a Welcome Center Desk	16 7:00 a - 11:00 a Welcome Center Desk	17 7:00 a - 11:00 a Welcome Center Desk	18 7:00 a - 11:00 a Welcome Center Desk	19 7:00 a - 11:00 a Welcome Center Desk	20
21	22 7:00 a - 11:00 a Welcome Center Desk	23 7:00 a - 11:00 a Welcome Center Desk	24 7:00 a - 11:00 a Welcome Center Desk	25 7:00 a - 11:00 a Welcome Center Desk	26 7:00 a - 11:00 a Welcome Center Desk	27 
28	29 7:00 a - 11:00 a Welcome Center Desk	30 7:00 a - 11:00 a Welcome Center Desk				

Prev month
Next month

Printable view

Exit

[Close this window](#) | [Privacy policy](#)

If you are scheduled for an assignment, you will see the assignment and times listed on the dates you are scheduled for. If your organization allows you to self-schedule, there will be a *Help Wanted* icon on the dates where help is needed. To serve on a date where help is needed, click on the date and then click the **Schedule me** button.

If your organization allows you to remove yourself from the schedule, click on a date you are scheduled and then click the **Remove me** button to take yourself off of the schedule.



## Volunteer Information Center

### Volunteer information for **Andrea Campbell**

[Home](#) [Mail](#) [My Profile](#) [My Schedule](#) [My Service History](#) [Time Sheet](#) [Account](#)

Schedule for

**Thursday, September 25, 2014**

**You are scheduled**

7:00 a to 11:00 a

**Welcome Center Desk** [Description](#)

Can't serve on this date? Click the Remove me button to remove yourself from these times

[Remove me](#)

### Schedule

**Welcome Center Desk** [Description](#)

7:00 a to 11:00 a Campbell, Andrea

11:00 a to 3:00 p Mata, Christina

3:00 p to 7:00 p Stover, Heather


[Calendar view](#)

[Exit](#)

[Close this window](#) | [Privacy policy](#)

If you do not see the **Remove me** button, your organization either does not allow you to remove yourself from the schedule, or you are too close to the scheduled date to remove yourself. Each organization selects how many days prior to your scheduled date you can remove yourself. In either case, you will need to contact the organization you volunteer with to remove yourself if the **Remove me** button does not appear.

Instead of the monthly calendar view, your organization may select to have the My Schedule tab formatted in a list view. An example of this is shown below:



## Volunteer Information Center

### Volunteer information for Andrea Campbell

Home
Mail
My Profile
My Schedule
My Service History
Time Sheet
Account

**Instructions**  
Your regularly scheduled volunteer shifts appear on the calendar. Click the "Next month" or "Previous Month" buttons to view a different month. For a printable view of your schedule click the "Printable view" button.

**Sign-Up!**  
Schedule yourself for volunteer duty

	Date	Assignment	From	To	
<input type="checkbox"/>	September 4, 2014 (Thursday)	Welcome Center Desk [Info Desk]	7:00 p	11:00 p	
<input checked="" type="checkbox"/>	September 4, 2014 (Thursday)	Welcome Center Desk [Info Desk]	7:00 a	11:00 a	<a href="#">Remove me</a>
<input type="checkbox"/>	September 5, 2014 (Friday)	Welcome Center Desk [Info Desk]	7:00 p	11:00 p	
<input checked="" type="checkbox"/>	September 5, 2014 (Friday)	Welcome Center Desk [Info Desk]	7:00 a	11:00 a	<a href="#">Remove me</a>
<input checked="" type="checkbox"/>	September 8, 2014 (Monday)	Welcome Center Desk [Info Desk]	7:00 a	11:00 a	<a href="#">Remove me</a>
<input checked="" type="checkbox"/>	September 9, 2014 (Tuesday)	Welcome Center Desk [Info Desk]	7:00 a	11:00 a	<a href="#">Remove me</a>
<input checked="" type="checkbox"/>	September 10, 2014 (Wednesday)	Welcome Center Desk [Info Desk]	7:00 a	11:00 a	<a href="#">Remove me</a>
<input type="checkbox"/>	September 11, 2014 (Thursday)	Welcome Center Desk [Info Desk]	7:00 p	11:00 p	
<input checked="" type="checkbox"/>	September 11, 2014 (Thursday)	Welcome Center Desk [Info Desk]	7:00 a	11:00 a	<a href="#">Remove me</a>
<input type="checkbox"/>	September 12, 2014 (Friday)	Welcome Center Desk [Info Desk]	7:00 p	11:00 p	
<input checked="" type="checkbox"/>	September 12, 2014 (Friday)	Welcome Center Desk [Info Desk]	7:00 a	11:00 a	<a href="#">Remove me</a>
<input checked="" type="checkbox"/>	September 15, 2014 (Monday)	Welcome Center Desk [Info Desk]	7:00 a	11:00 a	<a href="#">Remove me</a>
<input checked="" type="checkbox"/>	September 16, 2014 (Tuesday)	Welcome Center Desk [Info Desk]	7:00 a	11:00 a	<a href="#">Remove me</a>
<input checked="" type="checkbox"/>	September 17, 2014 (Wednesday)	Welcome Center Desk [Info Desk]	7:00 a	11:00 a	<a href="#">Remove me</a>
<input type="checkbox"/>	September 18, 2014 (Thursday)	Welcome Center Desk [Info Desk]	7:00 p	11:00 p	
<input checked="" type="checkbox"/>	September 18, 2014 (Thursday)	Welcome Center Desk [Info Desk]	7:00 a	11:00 a	<a href="#">Remove me</a>

[Continue](#)
Click Continue to schedule yourself for the assignments and dates selected above

[Printable view](#)

[Cancel](#)

[Exit](#)

Close this window | [Privacy policy](#)

Shifts you are already scheduled for show up with green text and if you can remove yourself there will be a **Remove me** button on the right side of the list. Opportunities to serve are displayed with red text along with a checkbox. To schedule yourself, check a box next to an opportunity and then click the **Continue** button.

### The My Service History tab

The *My Service History* tab shows volunteer service recorded on your volunteer record. If your organization uses mandatory service programs where you are asked to perform a certain amount of service in a certain amount of time, you may see a progress chart that shows your progress in meeting the goal. Here is an example of what the *My Service History* tab might look like:



## Volunteer Information Center

### Volunteer information for Andrea Campbell

[Home](#) [Mail](#) [My Profile](#) [My Schedule](#) [My Service History](#) [Time Sheet](#) [Account](#)

#### Instructions

Click the "Printable view" button for a printable view of this information.

#### Jun.-Sept. 2014 Service Challenge Service Goal

	Hours
Service goal:	320:00
Recorded so far:	244:00
Service remaining:	76:00
Started:	08-01-2014
Target date:	09-30-2014
Days left:	28

Progress:



#### Totals

Start date: December 26, 2007  
Year-to-date hours: 676:00  
Life hours: 2,754:25

#### Service by year

Click on a year to view your records for the year.

Year	Hours	Merit hours	Absences
2014	676:00	929:30	1
2013	1,013:29	1,013:29	3
2012	1,016:00	1,016:00	0
2010	3:40	3:40	0
2009	22:56	22:56	0
2008	22:20	22:20	0
<b>Life total:</b>	<b>2,754:25</b>	<b>3,007:55</b>	<b>4</b>

[Printable view](#)

[Exit](#)

[Close this window](#) | [Privacy policy](#)

Notice that the service information is collapsed by year to start. You can click on a year to expand the view to show all service entries made for you during the year. Click on a date to show the service details for a particular entry.

#### The Time Sheet tab

If your organization wants you to enter service hours, you will see a Time Sheet tab. As with the other VicNet tabs, this can be setup in several different ways so do not be concerned if your Time Sheet tab does not match the one shown below:



**Your Logo Here**

**Volunteer Information Center**

**Volunteer information for Andrea Campbell**

Home Mail My Profile My Schedule My Service History **Time Sheet** Account

**Instructions**  
To post your hours, enter your service information in the Time Sheet box and then click the "Continue" button.

**Time Sheet**

What was the date of your service?  
 August 2014  
 S M T W T F S  
 25 26 27 28 29 30  
 31  
 September 2014  
 S M T W T F S  
 1 2 3 4

What times did you serve? 8 : :00 am until 9 : :00 am

Which assignment did you serve in? Choose one

**Continue**

**Your recent service entries:**

Date	Assignment	Hours
08-29-2014	Welcome Center Desk [Main Hospital/Info Desk]	4:00
08-28-2014	Welcome Center Desk [Main Hospital/Info Desk]	4:00
08-27-2014	Welcome Center Desk [Main Hospital/Info Desk]	4:00
08-26-2014	Welcome Center Desk [Main Hospital/Info Desk]	4:00
08-25-2014	Welcome Center Desk [Main Hospital/Info Desk]	4:00

For your complete service history select the "My Service History" tab.

**Exit**

Close this window | Privacy policy

To post hours, you will need to choose a date for the service and either the number of hours, or your start and stop times on the date you served. Your organization may also have you select the assignment and other service measure (such as mileage or travel times) for the service entry. Click the **Continue** button and confirm your entry when you are done posting your service.

### The Account tab

The Account tab is where you will go to set a permanent password, change your permanent password, opt-in or out of text messaging, and change your message preferences. If you sign-in with a temporary password, you will be directed to the Account tab before you can access the other tabs.

If you do not have a password, or have forgotten it, you can have a link sent to you so you can create a password. You can learn more about how this works [link here \[pg:1975\]](#).

If the organization you volunteer with has enabled text messaging, you will also see a section on the Account tab for text messaging. You can use this section to opt-in to text messaging, opt-out of text messaging, or change the types of messages you receive by text. You can find information on how to do these things [here \[pg:0323\]](#).

An example of how the Account tab may look is shown below:

**Your Logo Here**

**Volunteer Information Center**

**Volunteer information for Andrea Campbell**

Home Mail My Profile My Schedule My Service History Time Sheet **Account**

**Change your password**  
You can change the password you use to access your volunteer information. Enter your current password, enter your new password twice, and then click the Save button.

Your new password must:

- Be between 6 and 30 characters long
- Contain both letters and numbers.
- Contain a combination of both uppercase and lower case letters.
- Contain at least one character that is not a letter or number, such as !#\$% or ?.

Enter your **current** password here:  \*(Required)

Enter your **new** password here:  \*(Required)

Enter your **new** password again:  \*(Required)

[Help](#)

**Message Preferences (Email / Text Messaging)**  
Use this section to opt-in and opt-out of text messaging (also known as "SMS"). You can change preferences for how you would like to receive messages, whether as emails, text messages, or none.

1. Please Enter Your Mobile Device Number:

Volistics Volunteer Alerts sends reminders, alerts, and custom messages from System Operators and Coordinators using text messaging (SMS). Please tell us where we can send messages.

Enter a mobile phone number:  Your country:

*This is a required field.*

Supported Carriers: AT&T, Sprint, Nextel, Boost, Verizon Wireless, U.S. Cellular®, T-Mobile®, Cellular One Dobson, Cincinnati Bell, Alltel, Virgin Mobile USA, Cellular South, Unicel, Centennial and Ntelos.

2. How do you prefer to receive these types of messages?

**Automated Messages**

Email	Message	None
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
		Schedule reminders
		Checklist reminders

**Custom Messages**

Email	Email with text notification	None
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
		Electronic newsletters
		Recruitment appeals
		Information Request

**If you have any questions about how to use VicNet, you should contact the volunteer office at your organization.**

The following videos explain more about how to use VicNet. Each video shows a different way an organization may have VicNet setup. Choose the video that matches your organization's VicNet setup the closest.

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## How do volunteers get started with VicNet?

Help topic 1158

Added or revised 04-12-2017

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Many organizations wonder how they create volunteer "accounts" to allow volunteers to sign-in to the [VicNet \[pg:1724\]](#) module. The good news is if the volunteer has a record in your database, the volunteer already has an "account." You can learn how volunteer records can be added to your database in [help topic 2299 \[pg:1878\]](#).

Once a volunteer has a record, they will need to meet three requirements in order to use VicNet:

- They will need a [Status \[pg:1832\]](#) (and optionally a [Type or Flag \[pg:0212\]](#)) that is allowed to access VicNet. You control access requirements on the [VicNet Ground Rules \[pg:1447\]](#) page.
- An email address on the [Core tab \[pg:1868\]](#) of their volunteer record.
- The *Disable access* box on the [Vic tab \[pg:1810\]](#) of the volunteer's record cannot be checked.

As long as a record meets all three items that are listed above, the volunteer will be able to use VicNet. The trick is often educating the volunteers on what they need to do. This help topic reviews some of the common strategies for using the VicNet portal, collecting volunteer information, and letting volunteers know about VicNet.

You should choose the strategy (or strategies) that works best for your organization's structure and requirements. For example, a festival may want applicants to be able to access VicNet right away without any onboarding requirements. So an option where the applicants choose their password on the application form will work best for them. However, an organization such as a hospital will likely have onboarding requirements so a method where the [System Operators \[pg:0065\]](#) send login information after the volunteers are approved will work best for them.

You can click on a link in the *Content* box below to go directly to a section of the help topic.

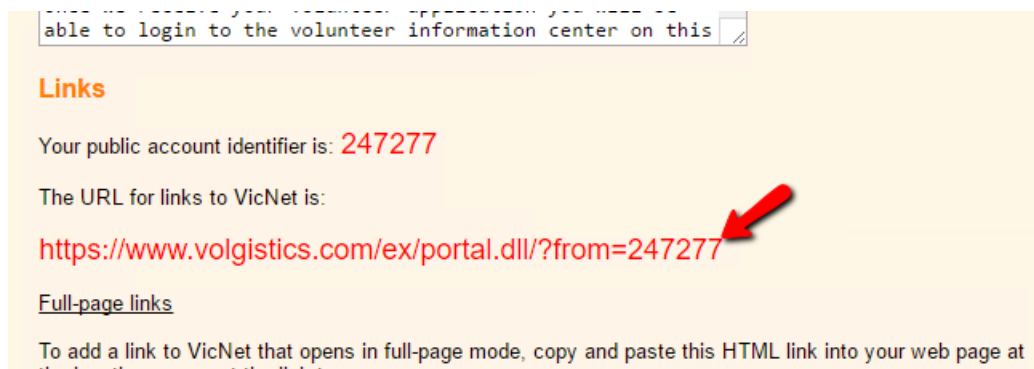
## Contents

- Where is the VicNet Portal?
- Collect Login Information on Application Forms
- Send a Message with Login Information
- Use the "Need a Password?" Link
- Set a Temporary Password

## Where is the VicNet Portal?

Each Volgistics account has a unique URL address for their VicNet portal. You can find this by:

1. Select [Setup \[pg:0887\]](#) from the menu.
2. Expand the VicNet link.
3. Select *Ground Rules*.
4. Scroll down to the Links heading. The URL will appear in red like the one pictured below. Please note that your account's URL will have different numbers than the one pictured.



able to login to the volunteer information center on this

### Links

Your public account identifier is: **247277**

The URL for links to VicNet is:

**<https://www.volgistics.com/ex/portal.dll/?from=247277>**

Full-page links

To add a link to VicNet that opens in full-page mode, copy and paste this HTML link into your web page at

For testing, you can simply copy and paste the URL into a web browser window. In the majority of cases, when your volunteers are ready to use VicNet you will want to place a link to the URL somewhere on your website. Or some organizations choose to embed VicNet into their web pages so it appears to be part of their website.

With this option, volunteers do not need to know the URL address for VicNet. You simply give them directions to the web page on your site where the link appears. You can find more information on how to place a link to VicNet on your organization's website in [help topic 2153 \[pg:1491\]](#).

There may be some cases where an organization cannot place a link to VicNet on their website. In these cases, it is perfectly alright to give the volunteers the URL address for your VicNet portal. If you do this, you may want to encourage the volunteers to bookmark the address so you do not get repeated questions about how to get to the portal.

## Collect Login Information on Application Forms

If your applicants will be accessing VicNet soon after they apply, you may want to collect the email address and password from your volunteers right on your [application form\(s\) \[pg:0413\]](#). This option works well for accounts that use Volgistics for events such as conferences or festivals where there may not be a long approval or onboarding process.

You can [create a section \[pg:1340\]](#) on the application form just for the VicNet access information, and link the email and password fields to the form section. You link fields to a form section by selecting the *Fields* link on the application form's [setup page \[pg:1334\]](#).

With this method, you can place directions about the location of your organization's VicNet portal right in the instructions field of the form section. Or you could give directions with the [receipt confirmation \[pg:1349\]](#) feature. This could be a page applicants view after they submit the form, or an automatic email sent to the applicant after they submit the form. If you send it as an email message, volunteers could find the directions again by referring back to the email message.

Here is an example of how this option may look on your application form:

Work phone:   OK to call me here

**Volunteer Information Center (VicNet)**  
You will schedule yourself for shifts through the Volunteer Information Center (VicNet). Please enter the email address and password you'd like to use to access VicNet. Once you've been approved, you can sign-in to VicNet by:

1. Go to our website ([www.organization.org](http://www.organization.org))
2. Select the Volunteer page.
3. Click the 'Volunteer portal' link.

Email address:  \*

Please enter a password that:

- Is between 6 and 30 characters long
- Contains both letters and numbers.
- Contains a combination of both uppercase and lower case letters.
- Contains at least one character that is not a letter or number, such as !#\$%& or ?.

Password:  \*

Confirm password:  \*

**Emergency Contact**  
In the event of an emergency, whom should we notify?

**Please note:** If your application forms are setup to be audited, you will need to [receive the application into your database \[pg:0415\]](#), and the volunteer must meet the three requirements at the top of this help topic, in order to sign-in.

## Send a Message with Login Information

If your volunteers need to go through some sort of an approval, or onboarding, process before they can serve, you may want to send them an email message they can use to get their login information. Volgistics has a template you can use to customize a message to use for this email. The same template is used for three purposes: 1) when the message is sent by a [System Operator \[pg:0065\]](#) to volunteers, 2) when the message is sent by a System Operator to [Coordinators \[pg:0163\]](#), and 3) when the message is sent because volunteers or Coordinators request a password on the VicNet login page.

Because of this, you may want to keep the content of the message generic so that it works for all three purposes. However, it is still useful to give directions on how users login in the message. You customize this message by:

1. Select [Setup \[pg:0887\]](#) from the menu.
2. Expand the VicNet link.
3. Select *Ground Rules*.
4. Scroll to the *Password email* section and customize the message.
5. Click the **Save** button to keep your changes.

You can see a sample of what you could enter as the message's content below:

Expire every  days

### Password email

Volunteers and Coordinators can receive a link to set their password by email. You can customize the content of this message below. Volgistics inserts the person's login name (email address), and the password link, between the Top and Bottom parts

Top part:

Thank you for serving at "My organization." You can find login information for the Volunteer Information Center ([VicNet](#)) below. Click on the link to set your password. After you have successfully set a password, you will be directed to the login page.

Bottom part:

To login to VicNet in the future:

1. Go to our website ([www.organization.org](#))
2. Select the Volunteer page.
3. Click on the "Volunteer portal" link.
4. Enter your email address and password.

We appreciate your service! Please contact Jessica in Volunteer Services (555-444-3333) if you have trouble logging-in.

What should the subject line be for VicNet password emails?

Volunteer Information Center Password

**Heading**

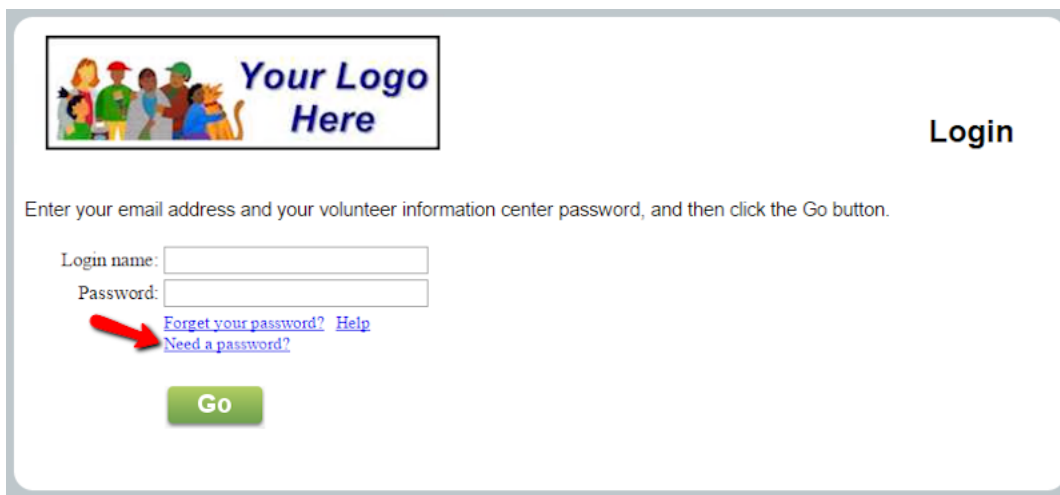
You can send the email with the link to individual volunteers and Coordinators on the Vic tab of their records. There is more information on how to do this in [help topic 2234 \[pg:1717\]](#).

You can also send the email with the link to multiple volunteers at once by [tagging the volunteers \[pg:1538\]](#) you want to send the email to. You can find information on how to do this in [help topic 2233 \[pg:2013\]](#).

## Use the "Need a Password?" Link

You may have a situation where you want your volunteers or Coordinators to get their own passwords so they do not need to rely on a System Operator. For example, if once the volunteers are approved to serve, you provide them with a packet of instructions on what to do next.

In this case, your volunteers can get their own passwords as long as your instructions include the location of your VicNet Portal, and they meet the three requirements to use VicNet. To do this, they will go to the login page for VicNet, and click the *Need a password?* link.



Enter your email address and your volunteer information center password, and then click the Go button.

Login name:

Password:

[Forget your password?](#) [Help](#)  
[Need a password?](#)

This will take them to a page where they can enter their email address to have the password link sent to them.

## Set a Temporary Password

There may be times when you want to set a temporary password that volunteers use to login to VicNet for the first time. For example, if you have volunteer orientations where you will train groups of volunteers all at once, you can set the same temporary password for the entire group and tell them the temporary password. Or, you may give out new volunteer packets where you have instructions on how to login and you give the temporary password in the instructions. When volunteers login with the temporary password the first time, they will be prompted to select a permanent password.

You can set a temporary password for volunteers (or Coordinators) on the [Vic tab \[pg:1810\]](#) of their record.

You can also set temporary passwords for multiple volunteers at once by [tagging the volunteers \[pg:1538\]](#). You can find information on how to assign a temporary password to tagged volunteers in [help topic 2137 \[ \]](#).

## Did you know?

Volgistics has resources you can use if you conduct trainings or orientations for new volunteers. There are video tutorials you can download

here

. There are also help topics you can direct volunteers to online, or you can print the help topic out for a handout. The help topic for the desk top view is [help topic 1148 \[pg:1654\]](#). The help topic for the mobile view is [help topic 1215 \[pg:1676\]](#).

If you are bringing in new volunteer records to your account using the free Import Utility program, you can also bring in a temporary password for the volunteers. This works well if you are just getting started with Volgistics and previously used another program that the volunteers accessed with a password. You can learn more about the free Import Utility program [here](#).

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## Can I put a link to VicNet on the volunteer application form?

Help topic 1159

Added or revised 2-14-2008

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There is not a way to include a link to VicNet on the volunteer application form. Note that the earliest point at which an applicant could log into VicNet is after their application has been received into the system. Until a system operator receives an application, the database does not contain a volunteer record - and therefore does not have an email address or password - for that individual.

Since it is not possible for an applicant to log into VicNet at the same time they are completing their application, linking to the VicNet login page from the application form is not very practical.

If you still want to provide applicants with information about the VicNet login procedures right away, consider implementing one of the options described in [help topic 1158 \[pg:1665\]](#) or place the link to VicNet on your web site adjacent to the link to the application form.

### Related help

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## Getting Started with VicNet

Help topic 1175

Added or revised 04-12-2017

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[VicNet \[pg:1724\]](#) is an optional module that can be used along with Volgistics to give volunteers and [Coordinators \[pg:0163\]](#) a role in managing schedules, service, updating their information, and more from any computer or device with Internet access. The Volgistics system itself provides powerful volunteer tracking capabilities with, or without, use of the optional VicNet module. It is up to the organization to determine whether VicNet will be useful for their specific purposes. For example, an organization where volunteers all report to the same facility and volunteers do not need to schedule in advance, or update their information, may find the optional [VicTouch \[pg:1778\]](#) module more useful than VicNet. In many cases, though, VicNet will be a valuable asset to make the job of the volunteer manager(s) easier.

This help topic explains how Volgistics [System Operators \[pg:0065\]](#) should begin working with VicNet.

## 1. Understand what VicNet does.

With VicNet, volunteers and [Coordinators \[pg:0163\]](#) can log into a system separate from Volgistics that allows them to see only the information permitted by the account's [Administrator\(s\) \[pg:0052\]](#). The VicNet module can be accessed from any computer or device with an Internet connection with a login name (the email address recorded in Volgistics) and password. The module works somewhat differently for volunteers and Coordinators.

We recommend reviewing [help topic 3020 \[pg:1724\]](#) to get an understanding of how VicNet works before proceeding. The help topic shows some of the jobs and tasks volunteers can complete, and shows the general structure of the module.

## 2. Decide who should have access to VicNet.

You can control which volunteers can access VicNet based on the volunteer's [Status \[pg:1832\]](#), or whether they have a certain [Type or Flag \[pg:0212\]](#). This gives you the ability to prevent certain groups of volunteers from signing in. For example, if your organization has an onboarding process where volunteers need to be approved before they serve, and volunteers must meet certain qualifications to keep serving, you would likely setup VicNet so volunteers with the Applicant and Inactive Statuses cannot access VicNet. You do this on the VicNet Ground Rules page. To get to this page:

1. Select [Setup \[pg:0887\]](#) from the menu.
2. Expand the VicNet link.
3. Select *Ground Rules*.

You may find [help topic 2161 \[pg:1707\]](#) "Who can access VicNet?" useful also.

## 3. Customize VicNet for your needs.

VicNet is very customizable so you can tailor it for your organization's needs. For example, you can hide tabs, change the layout of some tabs such as the Home tab, customize instruction fields, hide fields or make them view only, and even change the appearance of the tab and button elements. For the mobile version of VicNet, you can also easily customize the colors used for the different page elements so they match your organization's color scheme.

You can find detailed information about how to customize VicNet in the help topics listed under *Related help* at the bottom of this page. For example, to find information on adding a logo, select [help Topic 1187 \[pg:1353\]](#) "How to Upload Logo Graphics," or for information on customizing the Home tab, select [help topic 2019 \[pg:1486\]](#) "VicNet Home Tab."

## 4. Test VicNet for a sample volunteer record.

The best way to check to make sure VicNet is setup the way you'd like is to preview the module as a volunteer. First [create a volunteer record \[pg:1877\]](#) to use for testing, or go to a current volunteer's record. You can then click the

### Preview

or

### Mobile preview

button on the Vic tab of the record to see how VicNet will look for that volunteer. You can also preview VicNet as a [Coordinator \[pg:0163\]](#) by doing the same thing. You can learn more about how to preview VicNet in [help topic 2159 \[pg:1705\]](#) "Previewing VicNet."



## 5. Create a link to VicNet from your organization's web site.

Volunteers and Coordinators will access VicNet by going to the unique URL address for your organization's VicNet portal. While you can simply send users this URL address in an email message, this is not the recommended method because they will need to bookmark the URL in order to return to it. A better solution is to place a link to the URL address on your organization's website. You can do this yourself if you control your website's content, or you can give the URL to your organization's web master and have her place the link on a web page related to volunteers.

You can locate and access the URL for your account's VicNet login page like this:

1. Choose [Setup \[pg:0887\]](#) from the menu.
2. Click on VicNet.
3. Click on *Ground rules*.
4. Scroll down to the Links section.

Here you will find the URL address for your organization's VicNet portal without any formatting. There are also links that have some HTML formatting added if you prefer. You can find additional information on how to place a link to VicNet on your organization's website in [help topic 2153 \[pg:1491\]](#).

## 6. Let volunteers know VicNet is available.

Once you are familiar with the VicNet module and you are satisfied with its setup, it is time to involve your volunteers and/or Coordinators. There are several ways to [let volunteers know about VicNet \[pg:1665\]](#). You should review the available options and decide which option works best for your organization. Some things to consider are your on-boarding process for new volunteers, whether you have volunteer records in your account already, and whether you will provide access to all volunteers or just select groups of volunteers. In some cases you may want to start with one method for your current volunteers, and then switch to another method for new volunteers. After you have launched VicNet, you may want to check usage in a few weeks or a month to see if more training or communication is needed. You can find information on how to do this in [help topic 2278 \[pg:1718\]](#).

### Related help

- [Help Topic 1071 \[pg:1446\]](#) - VicNet Exit Page Setup
- [Help Topic 1073 \[pg:1447\]](#) - VicNet Ground Rules
- [Help Topic 1074 \[pg:1451\]](#) - VIC Graphics
- [Help Topic 1075 \[pg:1451\]](#) - Customizing VIC Graphics
- [Help Topic 1148 \[pg:1654\]](#) - How to Use VicNet: a Brief Guide for Volunteers
- [Help Topic 1158 \[pg:1665\]](#) - How do volunteers get started with VicNet?
- [Help Topic 1171 \[pg:1453\]](#) - VIC My Schedule Setup Page
- [Help Topic 1178 \[pg:1456\]](#) - VicNet My Profile Tab
- [Help Topic 1179 \[pg:1458\]](#) - Changing Volunteers VIC Privacy Settings
- [Help Topic 1187 \[pg:1353\]](#) - How to Upload Logo Graphics
- [Help Topic 1198 \[pg:1673\]](#) - Using VicNet for Groups
- [Help Topic 1204 \[pg:1460\]](#) - VicNet Time Sheet Tab
- [Help Topic 1207 \[pg:1465\]](#) - VIC My Service Setup Page
- [Help Topic 1214 \[pg:1471\]](#) - Customizing VIC Mobile Graphics & Styles
- [Help Topic 1215 \[pg:1676\]](#) - How to Use VicNet Mobile: a Brief Guide for Volunteers
- [Help Topic 1230 \[pg:0166\]](#) - How to Use VicNet: a Brief Guide for Coordinators
- [Help Topic 2019 \[pg:1486\]](#) - VicNet Home Tab
- [Help Topic 2153 \[pg:1491\]](#) - Creating Links to VicNet
- [Help Topic 2159 \[pg:1705\]](#) - Previewing VicNet
- [Help Topic 2161 \[pg:1707\]](#) - Who can access VicNet?
- [Help Topic 2170 \[pg:1494\]](#) - VIC Self-Scheduling

[Help Topic 2233 \[pg:2013\]](#) - Sending All Volunteers Their VicNet Passwords in One Step  
[Help Topic 2234 \[pg:1717\]](#) - How do I send an individual volunteer or Coordinator their VicNet password?  
[Help Topic 2278 \[pg:1718\]](#) - Track Overall VicNet Usage and Last Access Date  
[Help Topic 3020 \[pg:1724\]](#) - VicNet

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## How to Post Volunteer Newsletters at VicNet

Help topic 1188

Added or revised 05-16-2008

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If your organization publishes newsletters that you would like to share with volunteers, you can post them online at VicNet for volunteers to read.

### To include volunteer newsletters on the VicNet Home Tab:

1. Save your newsletters as [PDF documents \[pg:0449\]](#).
2. [Upload the PDF documents \[pg:0388\]](#) to the Mailbox Documents tab in Volgistics.
3. Add links to documents to a Document Link Box on the [VicNet Home Tab setup page \[pg:1486\]](#).

Your newsletters will now be available to any volunteer or coordinator permitted to access VicNet.

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## Using VicNet for groups

Help topic 1198

Added or revised 02-18-2011

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If you use [VicNet \[pg:1724\]](#) and you track [volunteer groups \[pg:1909\]](#) in Volgistics, group contacts can use VicNet to self-schedule their group members, as well as to post volunteer hours for their group online.

Since you do not track the individual group members when you use Group records, Volgistics does not provide a way for each separate member of a group to access their group's records through VicNet. However the group contact who you list on the Core tab in a Group record *can* use VicNet to schedule and post service for their group online using the VicNet system (if you want them to).

Group contacts [access VicNet \[pg:1707\]](#) the same way that individual volunteers do: through your organization's VicNet link, using their email address and a password.

Once a group contact logs-in to VicNet, the VicNet system looks and works the same way that it does for *Individual* volunteers except when it comes to self-scheduling on the "My Schedule" tab, and the "Time Sheet" tab (if you use either of these tabs). This help topic explains how these two features work for Group records.

### Group self-scheduling

Group [self-scheduling \[pg:1494\]](#) is supported in VicNet when you "Offer schedules using a calendar format." Group scheduling is not available when you setup self-scheduling to "Offer schedules using a list format," as that format is designed specifically for individuals. To see which way your self-scheduling features are configured; choose Setup from the menu; select VicNet; and then choose Self-Scheduling.

If you permit self-scheduling at VicNet using the calendar format, a group contact has the ability to schedule their group members for any assignment you allow them to self-schedule for. When a group contact self-schedules their group, they can specify the number of group members they want to add to the schedule in a single schedule entry.

To self-schedule, a group contact visits the "My Schedule" tab in their VicNet account the same way that an Individual volunteer does, and then clicks on the date and then the assignment they would like to schedule themselves for.

When the "Sign-up" page appears (as shown below), the group contact has a *Volunteers* field where they enter the number of group members they want to schedule. This is the number of volunteers who will be scheduled for the group.

## Volunteer information for Downtown Rotary (Tom Applebe)

Home Mail My Profile My Schedule My Service History Time Sheet Account

### Sign-Up!

Schedule yourself for volunteer duty

**You are signing-up to serve:**

Date: **Thursday, February 24, 2011**

Assignment: **Client Advocate**

From: **8:45 a**

To: **1:15 p**

Volunteers:  (The number of volunteers from your group that you want to schedule for these times)

**Is this correct?**

The group contact can enter the number of group members they want to schedule using the *Volunteers* field

For example, if a group contact wants to schedule 10 group members for the selected assignment, date, and times, they would choose 10 in the *Volunteers* field. Ten volunteers will then be self-scheduled.

If the group contact selects an assignment that permits scheduling only for the **openings you have established [pg:0776]** for that assignment, they cannot schedule more group members than there are openings currently available.

Group contacts will see their schedule on the "My Schedule" tab just as individual volunteers see their schedules in VicNet.

### Group time sheets

If you use the VicNet *Time sheet* tab to give volunteers a way to post their hours online, then group contacts can also use the Time sheet tab to post their group's volunteer service (if you want them to).

When group contacts use the Time sheet tab to post their group's volunteer service, they have a

### *Volunteers*

field where they enter the number of group members who participated in the volunteer service they are posting. These volunteer counts can be factored into any [unduplicated volunteer counts \[pg:0452\]](#) you include on service reports.

### When volunteers must enter their starting and ending times

If you setup your VicNet time sheet tab so that volunteers *must enter their starting and ending times* on the time sheet, group contacts enter the number of group members who *each* served those hours, as shown here:

## Volunteer information for Downtown Rotary (Tom Applebe)

Home Mail My Profile My Schedule My Service History **Time Sheet** Account

### Instructions

To post your hours, enter your service information in the Time Sheet box and then click the "Continue" button.

### Group Time Sheet

What was the date of your service? February 24 2011

What times did you serve? 6:00 p until 9:00 p

Volunteers: 10 (How many members from your group served during these times?)

Which assignment did you serve in? Phone Bank [Volunteer Office]

Continue

If your time sheet tab is setup so that volunteers *must enter their starting and ending times*, as in the example pictured above, the time sheet will automatically multiply the Volunteers field by the elapsed time and then post the total number of hours served by the group. For example, if 10 group members served from 6:00 p.m. until 9:00 p.m., their service entry will be for 30 hours (10 x 3 = 30).

### When volunteers do not enter their starting and ending times

If you setup your VicNet time sheet tab so that volunteers *do not enter starting and ending times* on the time sheet, group contacts enter the total number of group members who participated in the service, and then the total number of hours they served collectively, as shown here:

## Volunteer information for Downtown Rotary (Tom Applebe)

[Home](#) [Mail](#) [My Profile](#) [My Schedule](#) [My Service History](#) [Time Sheet](#) [Account](#)

### Instructions

To post your hours, enter your service information in the Time Sheet box and then click the "Continue" button.

### Group Time Sheet

In which month did you serve?

Which assignment did you serve in?

What were the total number of hours served by your group?  
30 hours, 0 minutes

Volunteers:  (How many members from your group participated in this service?)

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## How to Use VicNet Mobile: a Brief Guide for Volunteers

Help topic 1215

Added or revised 03-23-2017

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*This help topic is intended to help volunteers better understand how to use the VicNet module when they access it from a smart phone, tablet, or other mobile device.*

The VicNet module is a tool the organization you volunteer with may use. You can access the VicNet module over the Internet on a mobile device such as a smart phone or tablet. You can use VicNet to:

- View and manage your schedule
- Sign-up for vacant schedule openings
- Keep your personal information up-to-date
- Post your hours
- Receive news and messages from the volunteer office
- Check your service records
- Change your VicNet password
- Opt-in or out of text messaging and update your message preferences

Each organization sets up VicNet according to what works best for their needs--so you may not be able to do everything listed above. This will depend on how your organization opted to use the features. **Please note:** *To make the user's VicNet experience mobile friendly, your experience with VicNet mobile may not be exactly the same as what you experience with the full-site view. For example, the Home page may not be laid out like you see it when you login on a desktop or laptop computer, and the Schedule page will not be shown in a calendar format.*

You can click on a link in the *Contents* box below to go directly to a section in the help topic.

## Contents

[Logging into VicNet Mobile](#)

[Navigating VicNet Mobile](#)

Home Page

Mail Page

My Profile Page

My Schedule Page

My Service History Page

Time Sheet Page

Account Page

[Create a Website Shortcut](#)

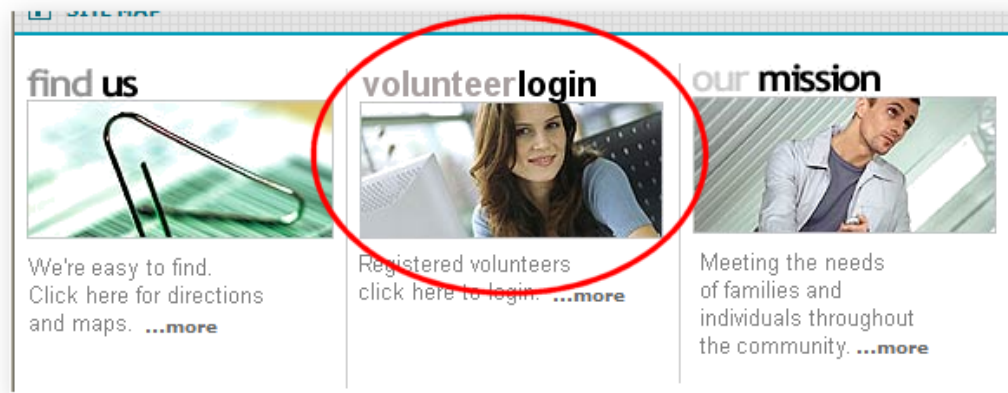
Shortcut for iOS (iPhone, iPad, etc.) Devices

~~Logging into VicNet Mobile~~

In most cases, you get to your organization's VicNet login page through the organization's website. An organization may choose to send you a URL address that you can use to login, but most of the time there will be a link to the VicNet login page somewhere on the organization's website. It may be a simple text link like this:

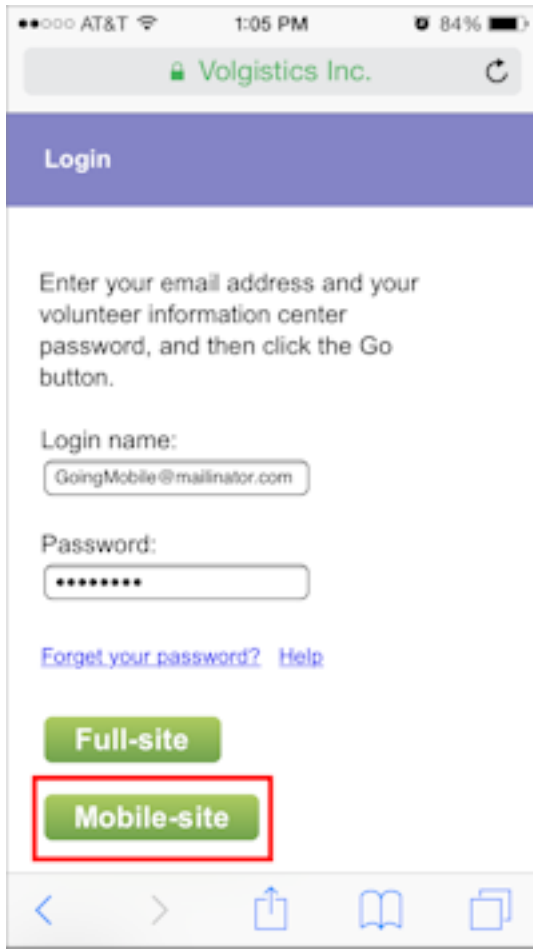
[Volunteer Login](#)

Or, it may be a graphic link like this:



Your organization should provide you with directions on how to locate the webpage you will need to use to login. Once you have located the webpage, you may wish to make a shortcut to it on your phone. This will allow you to go directly to the webpage by tapping the icon on your phone or tablet. See the Create a Website Shortcut section of this help topic for more information on this.

When you click on the link (or go to the URL address your organization provides you with) on your mobile device, you will see a login page. Enter your email address in the *Login name* field and your password in the *Password* field. Then tap the **Mobile site** button to go to a mobile friendly view for VicNet.



(If you'd rather use VicNet as it works when you sign-in on a desktop or laptop computer, tap the **Desktop site** button. In this case, VicNet will work as described in [help topic 1148 \[pg:1654\]](#).)

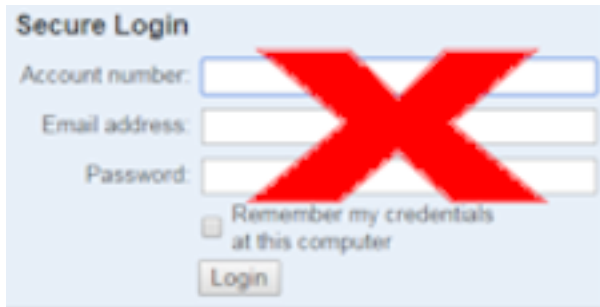
In most cases, you will receive a link to set your password in an email message from your organization. You follow the link to create the password you will use to login with.

In other cases, your organization may have set a temporary password for your record and let you know the temporary password. If your volunteer record was imported from another software program, your previous password may be the temporary password. When you login with the temporary password, you will need to enter a permanent password on the Account tab before you can go to other tabs. Remember the permanent password you select because you will need to use it the next time you login. You can find more information on the Account tab in the Account Tab section below.

One other thing that may occur is that your organization asked you to select a password when you filled out your application form. In this case, you use this password to login with and you will not need to go to the Account tab to select a permanent password the first time you login.

If you forget your password, or are not able to locate any password information from your organization, click the *Forget your password?* link that appears on the login screen. As long as the email address you enter matches the address on your volunteer record, this will send an email with a password link to you. You can follow this link to set a password to login with. **Please note that the password links only remain active for 24 hours. If you click on the link but it has expired, just click the *Forget your password?* link again to have a new link sent.**

You can find more information on how to use the *Forget your password?* link [here](#) [pg:1975].



The image shows a 'Secure Login' form with the following elements: 'Account number:' followed by a text input field; 'Email address:' followed by a text input field; 'Password:' followed by a text input field; a checkbox labeled 'Remember my credentials at this computer'; and a 'Login' button. A large, semi-transparent red 'X' is overlaid across the three input fields, indicating that the form is not to be used or is a placeholder.

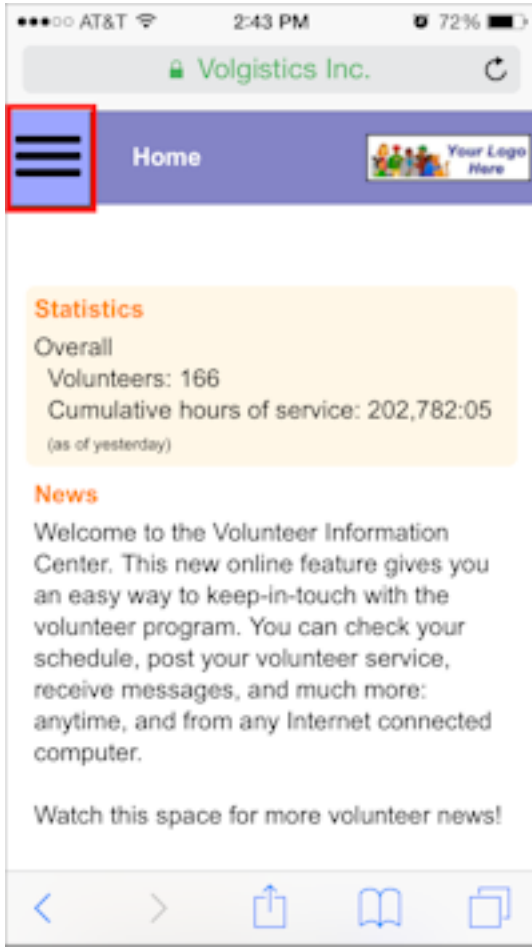
### **Navigating VicNet Mobile**

VicNet is highly customizable by each individual organization. Therefore, it is difficult to say exactly what type of content will be displayed on the various pages, or even if a page will be visible to you at all. The following information explains the basic purpose of each page that can be displayed, and provides visual examples of how the page might look. Your view in VicNet may be different depending on how the organization you volunteer with has setup their VicNet module.

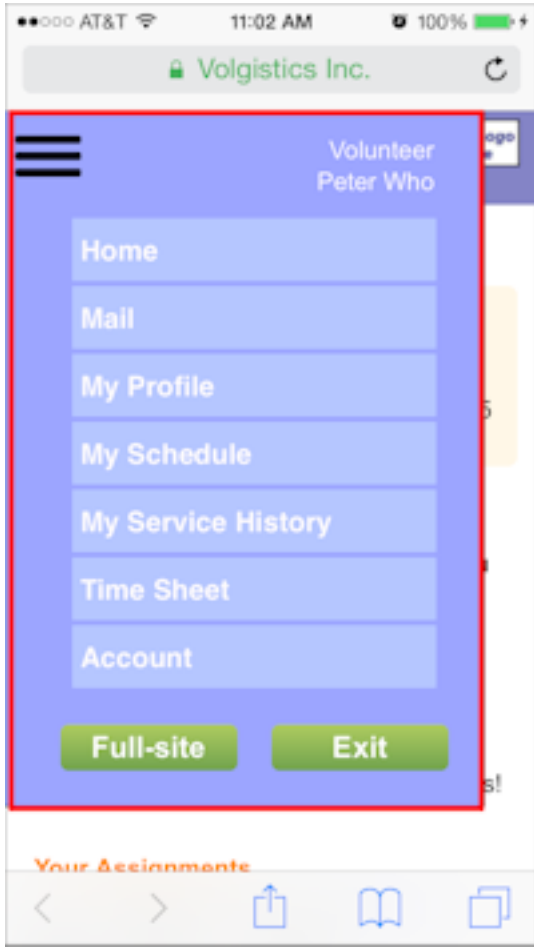
When you first login to VicNet either the Home page or the Account page will be displayed. If you are directed to the Account page first, set a permanent password and then you will be sent to the Home page. If you need help setting a permanent password, see the Account Page section below.

Once you are on the Home page, you can use the expanding menu to navigate to other pages. This will appear collapsed in the top left corner to start.





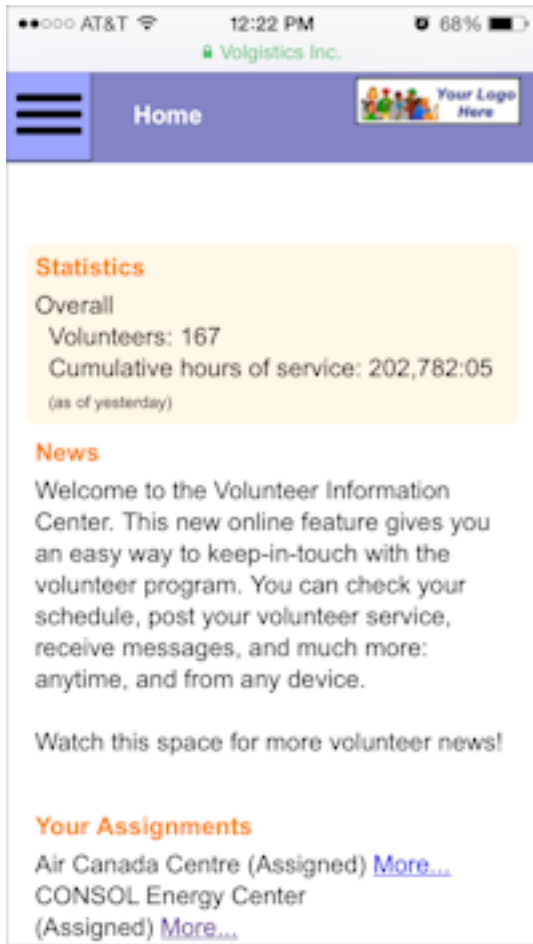
When you tap the menu, it will expand so that you can choose other pages.



Use the menu and tap a button to navigate to that page.

### Home Page

The following image is an example of what the mobile view of the VicNet Home page might look like:

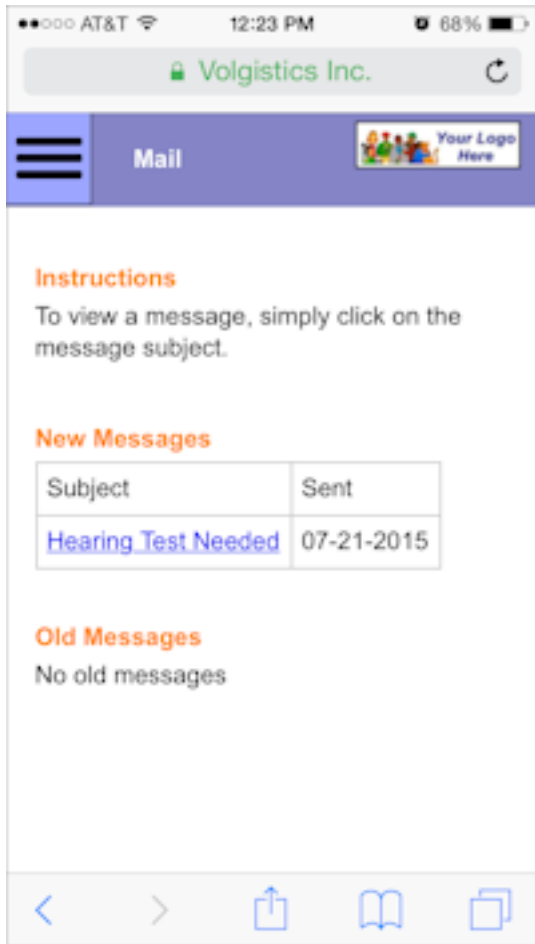


Depending on how your organization has VicNet setup, you may see statistics for your organization, news from your organization, links to documents or outside websites, and/or a list of your assignments.

### Mail Page

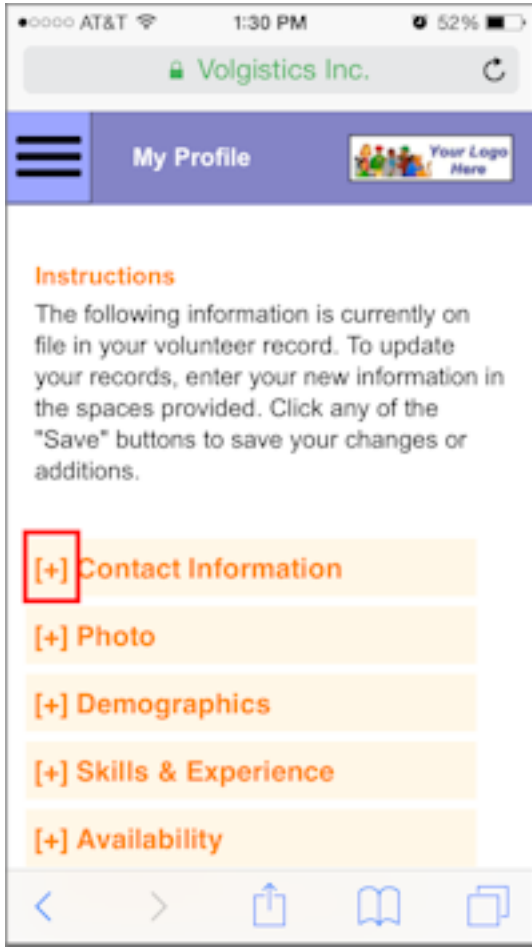
The Mail page is where you can see messages (called Vic Mail) sent to you from the person who coordinates volunteers for your organization. New messages appear on top, and a list of read messages appears on the bottom. To read a message, tap the Subject of the message.

Here is an example of what the Mail page might look like in VicNet mobile:

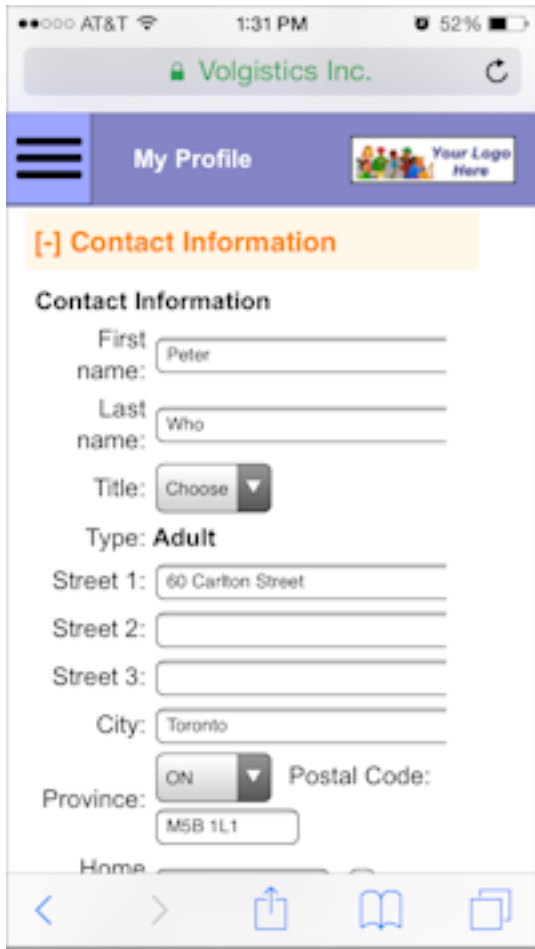


### My Profile Page

The My Profile page lets you see and (if your organization permits) update your personal information. The form sections and fields that appear on the tab are selected by your organization. Tap the plus sign (+) to expand a form section to see the fields in it.



The fields of information your organization has selected to appear in the form section will be shown.

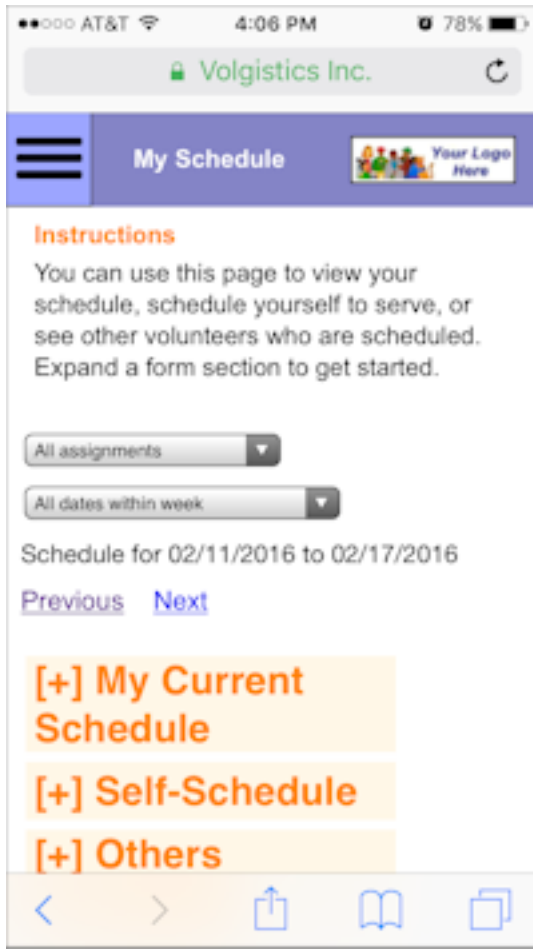


Your organization can choose to make certain fields required so you need to enter information in them in order to save the page. Or they can make certain fields *read-only* so you can see the information in the field, but you will not be able to change it. If you do make changes to a field, please remember to tap the **Save** button.

If the width of the fields in the form section exceeds the width of your mobile device's current screen orientation, you can scroll the section to the right to see the additional information. Or you can often just change from portrait to landscape orientation to increase your screen's width.

#### My Schedule Page

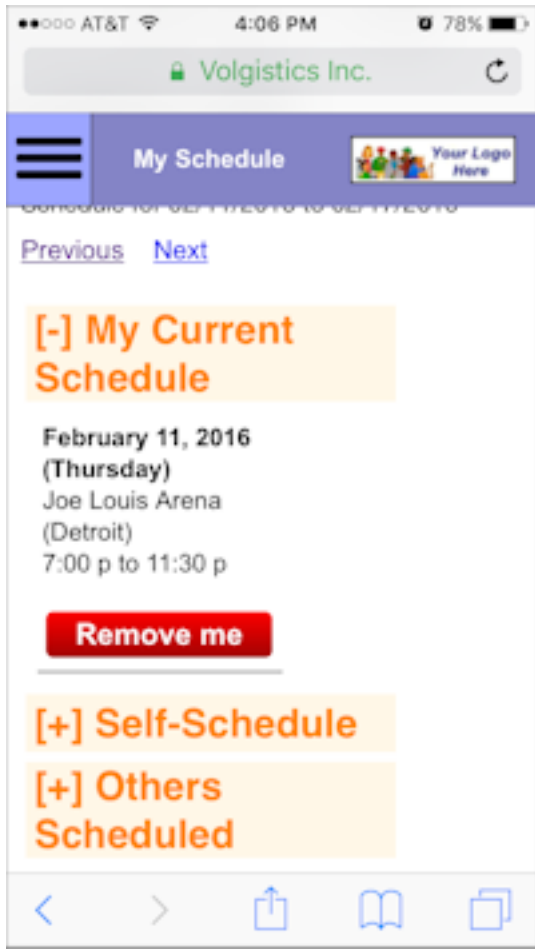
The My Schedule page allows you to view your schedule, and if your organization permits you can also self-schedule for assignments, remove yourself from the schedule, and/or see other volunteers who are scheduled. The image below shows an example of what the *My Schedule* page may look like in VicNet mobile.



The assignment dropdown can be used to select the assignment shown. If a particular assignment is selected from the dropdown instead of *All assignments*, the information in the sections on the page is limited to the schedule for whatever assignment is selected.

The schedule information is shown for a week at a time starting with the current week. (Or in some cases a default starting date range will be shown if your organization has selected to do this.) Use the *Next* and *Previous* links to move to a different week. If the date dropdown is set to *All dates within week* the schedule information for the entire week is shown. If a particular date in the week is selected from the dropdown, only schedule information for that date is shown.

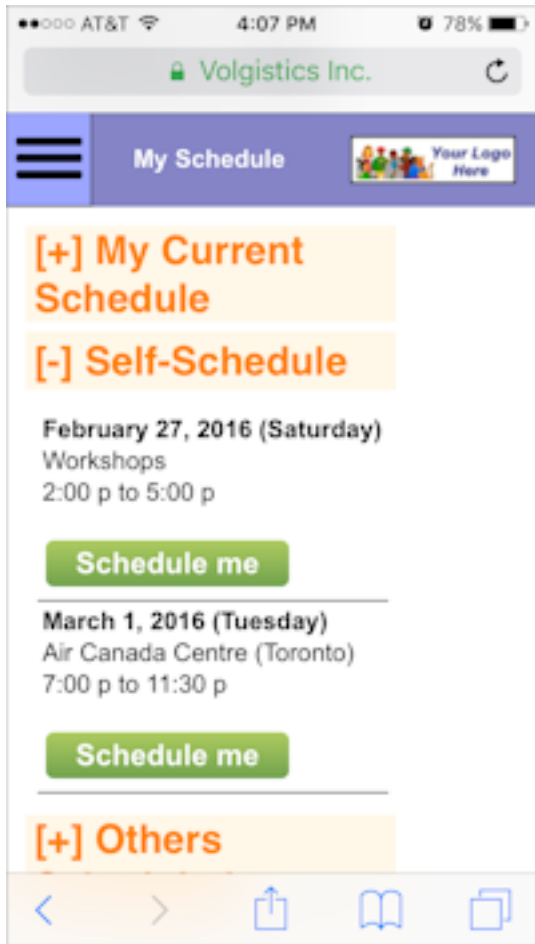
Tap the plus sign (+) by the *My Current Schedule* section to see your schedule for the week or date that is selected.



If your organization allows you to remove yourself from shifts, there will be a **Remove me** button as long as the time frame for when you can remove yourself has not passed. Tap this button if you cannot make it for your scheduled shift.

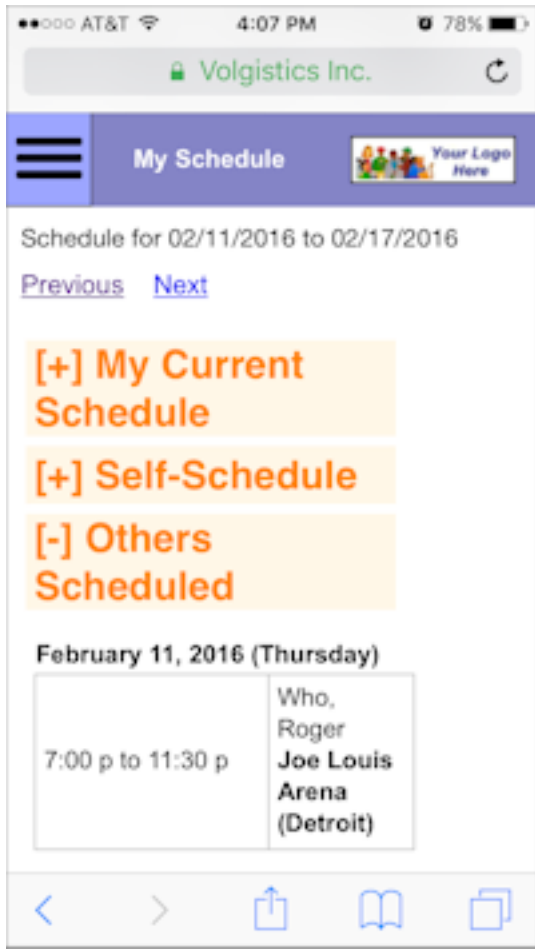
If your organization allows you to schedule yourselves for assignments, there will be a *Self-Schedule* section. Tap the plus sign (+) by this section to see opportunities to serve in the week or date that is selected.





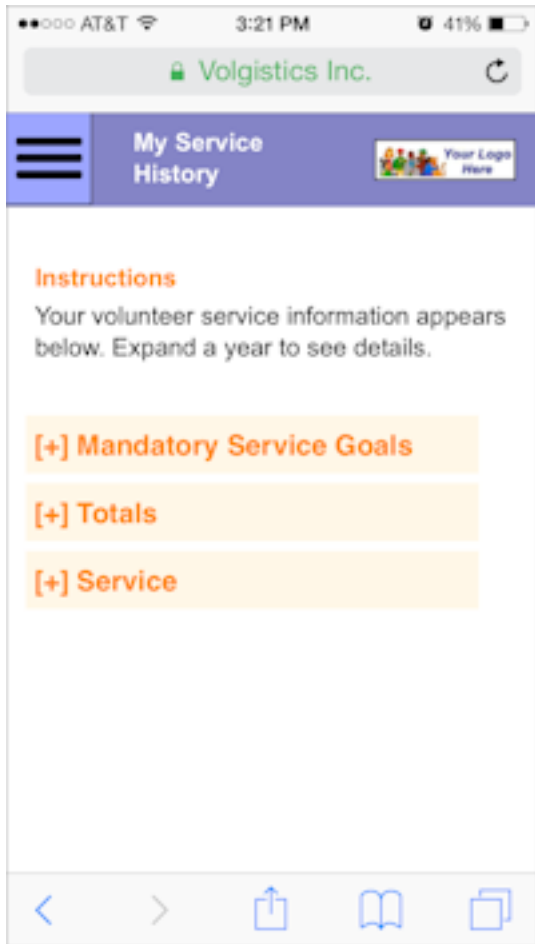
To schedule yourself to serve, tap the **Schedule me** button and then follow the prompts to sign-up.

Your organization may also allow you to see other volunteers who are scheduled. In this case, there will be an *Others Scheduled* section. You can tap the plus sign (+) to see the other volunteers who are serving in the week, or on the date, that is selected.



My Service History Page

The *My Service History* page shows volunteer service recorded on your volunteer record.



Expand a form section by tapping the plus (+) sign to see the service information recorded for you there. If the width of the display in the form section exceeds the width of your mobile device's current screen orientation, you can scroll the section to the right to see the additional information. Or you can often just change from portrait to landscape orientation to increase your screen's width.

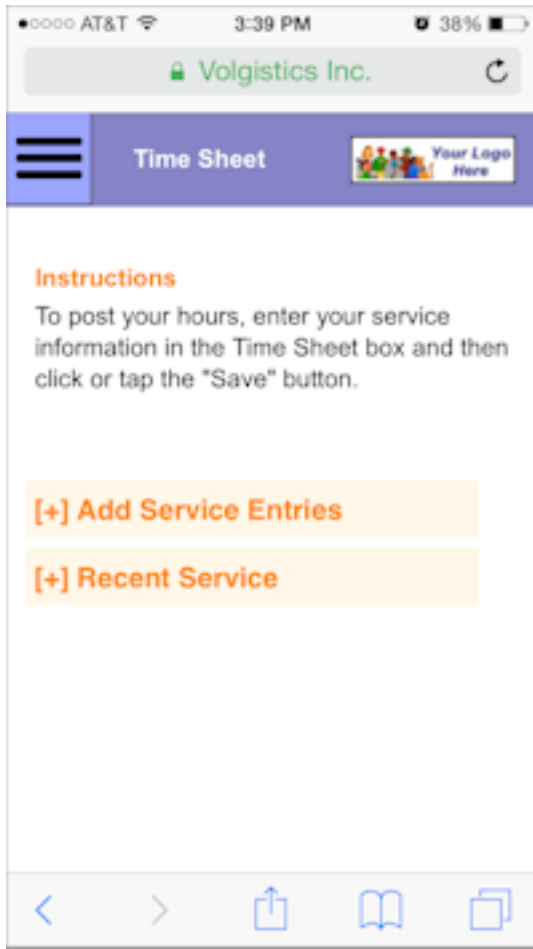
If your organization uses mandatory service programs where you are asked to perform a certain amount of service in a certain amount of time, expand the *Mandatory Service Goals* section to see a progress chart that shows your progress in meeting the goal.

The Totals section will show a summary of service information for your record. Depending on your organization's choices, you may see a start date, year-to-date (YTD) service hours, and life hours.

In the Service section, the service information is collapsed by year to start. You can tap on a year to expand the view to show all service entries made for you during the year. Tap a date to show the service details for a particular entry. Tap the *Back* link to return to the *My Service History* main page.

#### The Time Sheet Page

If your organization wants you to enter service hours, you will see a Time Sheet page.



You can make entries for new service hours you have performed in the *Add Service Entries* section. The *Recent Service* section will show up to five of your most recent service entries. To see entries beyond the first five, use the My Service History Page.

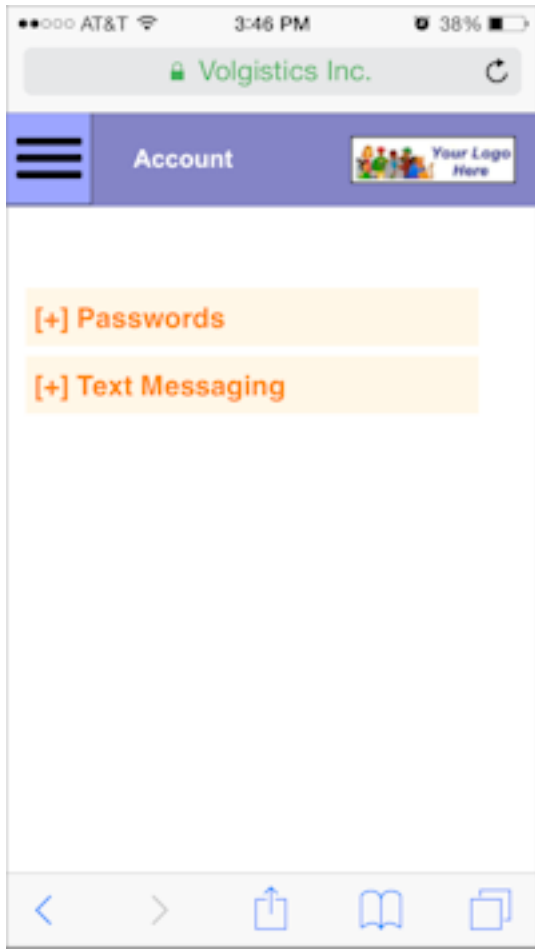
### Account Page

The Account page is where you will go to set a permanent password, change your permanent password, opt-in or out of text messaging, and change your message preferences. If you sign-in with a temporary password, you will be directed to the Account page before you can access the other tabs.

If you do not have a password, or have forgotten it, you can have a link sent to you so you can create a password. You can learn more about how this works [link here \[pg:1975\]](#).

If the organization you volunteer with has enabled text messaging, you will also see a section on the Account page for text messaging. You can use this section to opt-in to text messaging, opt-out of text messaging, or change the types of messages you receive by text. You can find information on how to do these things [here \[pg:0323\]](#).

An example of how the Account page may look is shown below:



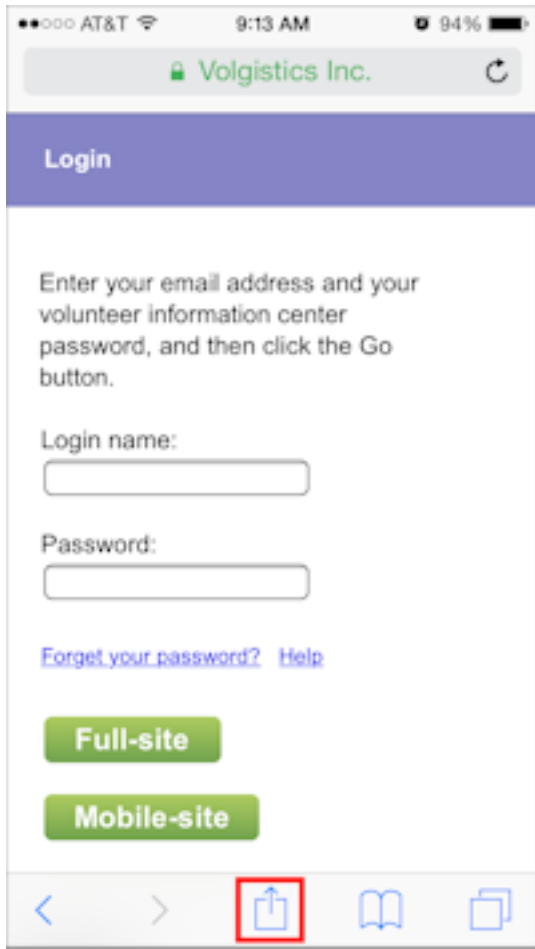
### **Create a Website Shortcut**

Instead of opening the web browser on your smart phone or tablet and then going to the URL address for your organization's portal each time you want to login, you may want to put a link directly to the webpage on your device's home screen. That way you can just tap the icon to go directly to the VicNet login portal. Go to the Shortcut for iOS (iPhone, iPad, etc.) Devices section if you have an Apple device. Or the Shortcut for Android Devices section if you have an Android device.

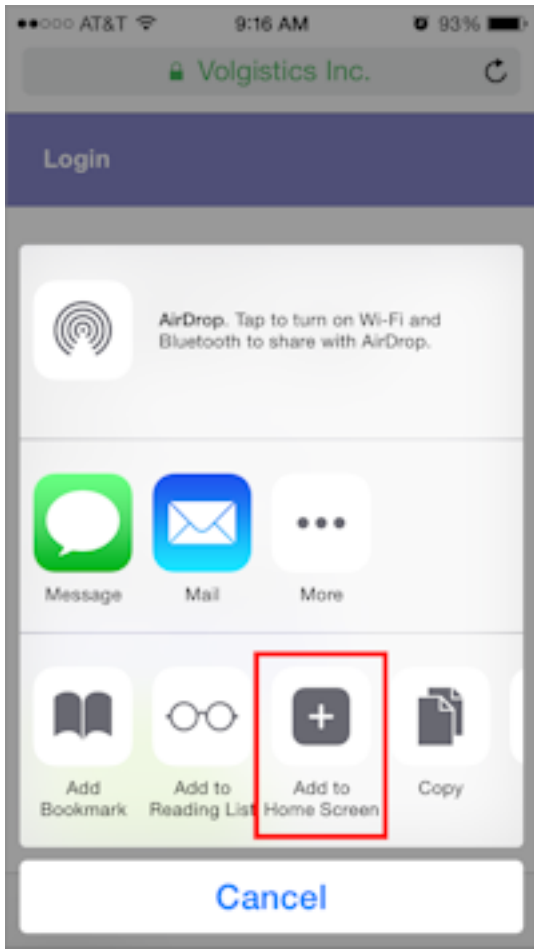
#### Shortcut for iOS (iPhone, iPad, etc.) Devices

To put a short shortcut on your Apple device, you will need to use the Safari web browser. The Google web browser will not allow you to make a shortcut. The screenshots and directions in this section are from an iPhone 5s. The process will be similar with other iPhone models or Apple devices.

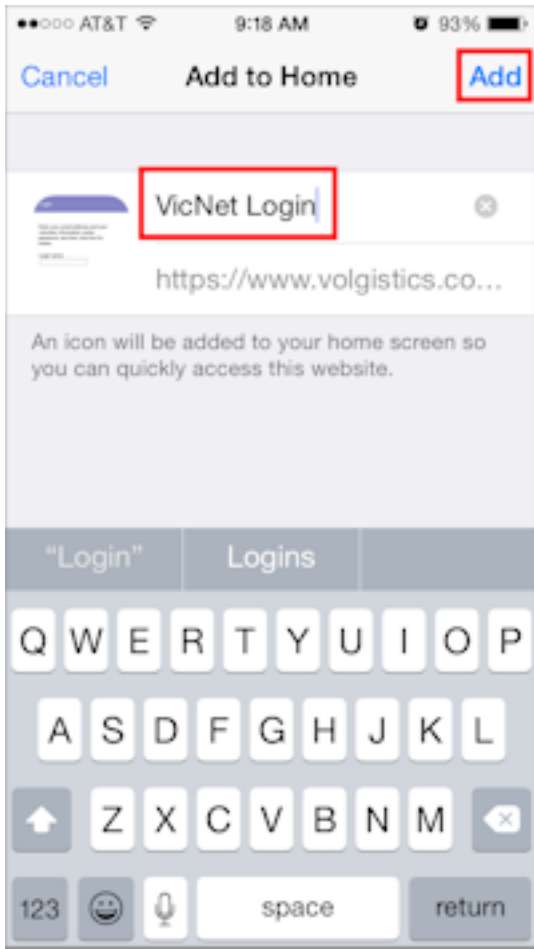
1. Open the Safari web browser.
2. Go to the login page for your organization's VicNet portal. The Logging into VicNet section above may be helpful if you do not know where this is.
3. When the screen to enter your email and password is displayed, tap the Share icon.



4. Select *Add to Home Screen*.

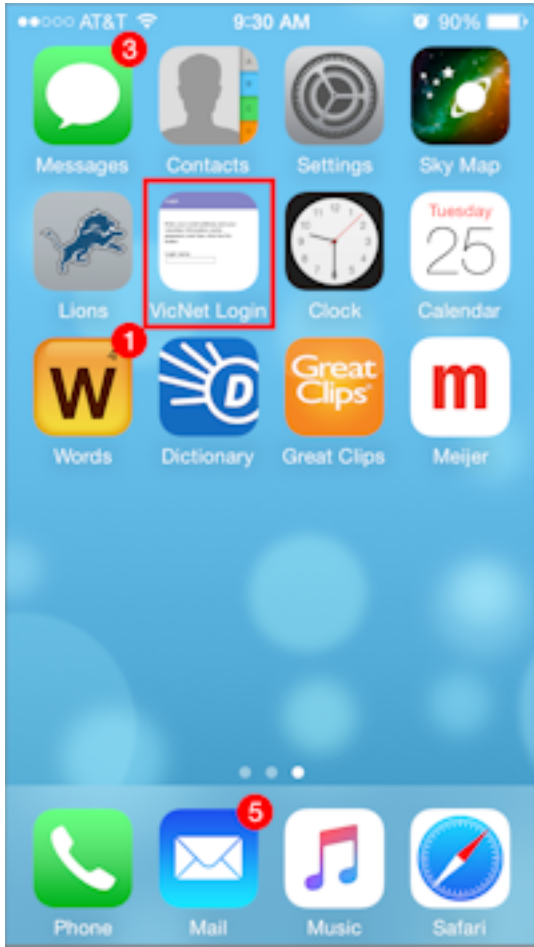


5. Create a name for the shortcut and tap the *Add* link.



You should now be able to simply tap the icon for the shortcut on your home screen to go to the VicNet portal to login.

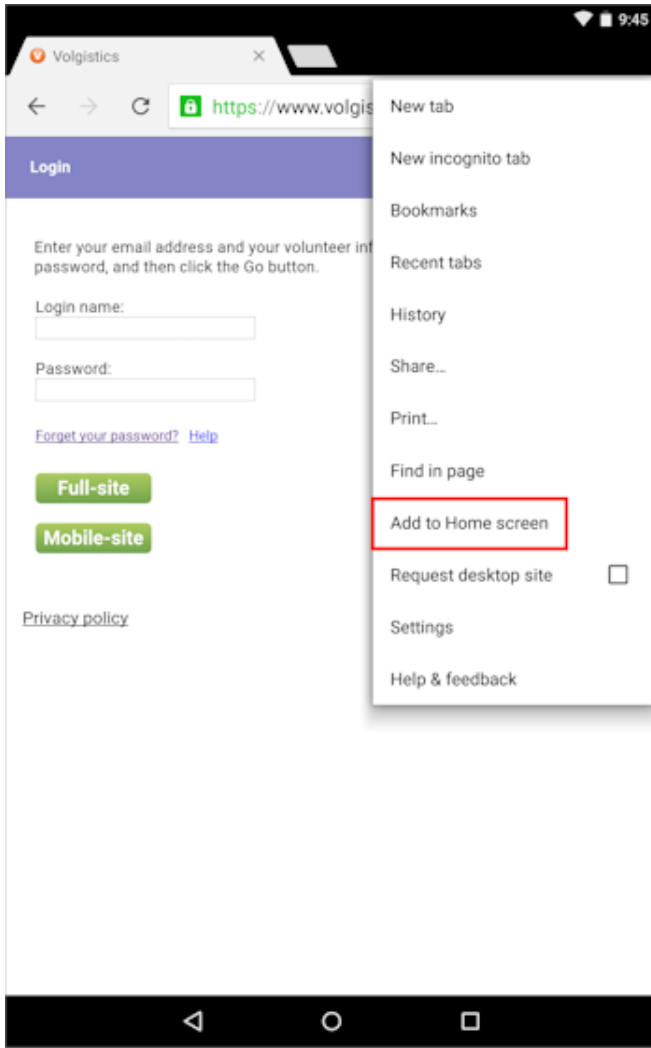




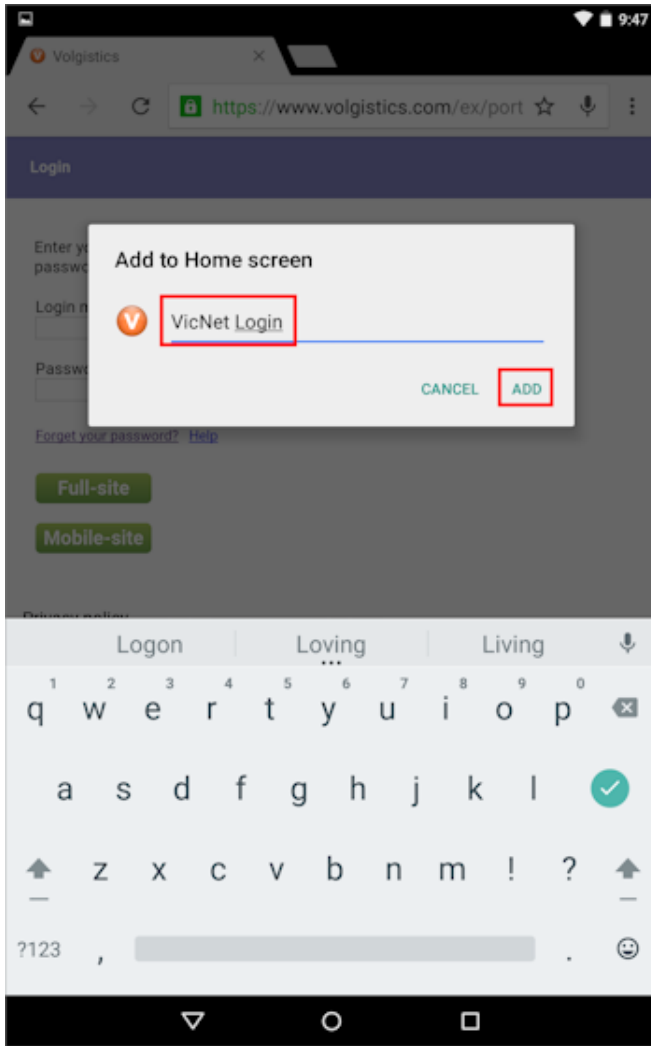
### Shortcut for Android Devices

With an Android device, you can use any web browser to place a shortcut on your home screen. The screenshots in this section show how to do this with the Chrome browser on an Android tablet. The process will be similar with other browsers and devices.

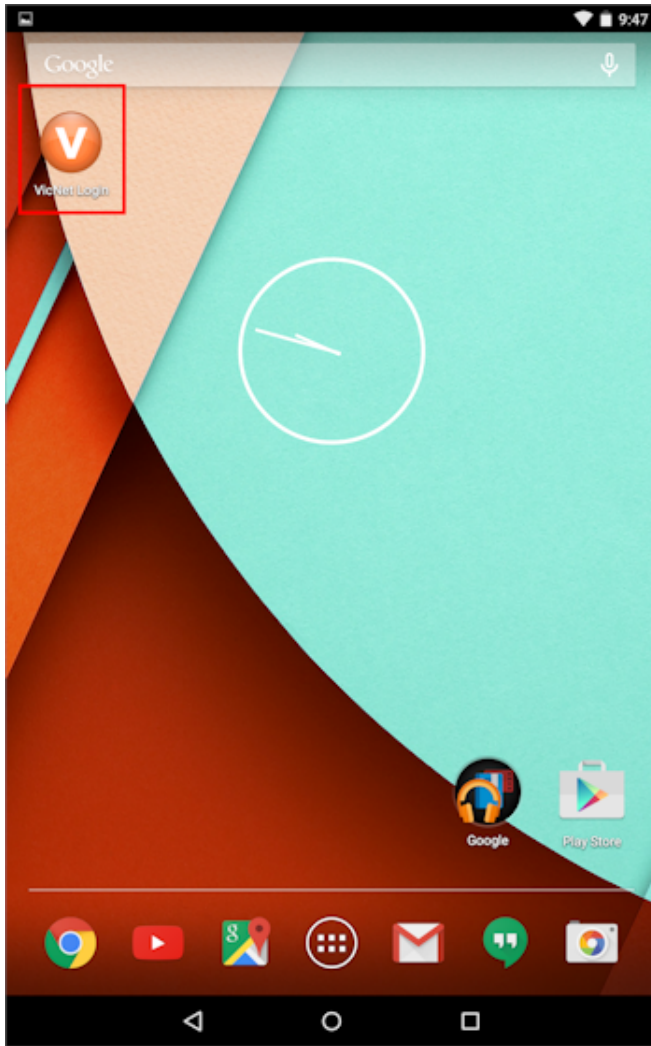
1. Open the web browser (Chrome, Firefox, or the default browser for the device).
2. Go to the login page for your organization's VicNet portal. The Logging into VicNet section above may be helpful if you do not know where this is.
3. When the screen to enter your email and password is displayed, tap the web browser's menu and select *Add to Home screen*. (In other browsers this may be *Add to homescreen* or *Add shortcut on Home Screen*.)



4. Enter a name for the shortcut and tap the *ADD* link. With some browsers there will not be an option to enter a name so you will need to use the default.



You should now be able to simply tap the icon for the shortcut on your home screen to go to the VicNet portal to login.



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## Volunteer & Coordinator Passwords

Help topic 1305

Added or revised 03-23-2017

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This help topic provides an overview of the password field volunteers and [Coordinators \[pg:0163\]](#) use to sign-in to the [VicNet \[pg:1724\]](#) module. It also has information on how this field can be reset if necessary. Click on a section of the help topic in the *Contents* box below to jump directly to that section.

### Contents

Initial Password Settings

Password Strength Rules

Change Password in VicNet

Reset Passwords

### Initial Password Settings

When a new volunteer or [Coordinator \[pg:0163\]](#) record is created, in the majority of cases it will not have a password. You simply send a link by email to the volunteer or Coordinator, and the person follows the link within 24 hours of receiving it to set her or his password. You can find information on how to send the link to individual volunteers or Coordinators in [help topic 2234 \[pg:1717\]](#). You can also send the email to multiple volunteers at once by [tagging the volunteers \[pg:1538\]](#) you want to send the message to. You can find information on how to do this in [help topic 2233 \[pg:2013\]](#).

If the new person knows the location of your [VicNet login portal \[pg:1491\]](#), she or he could also click the *Need a password?*

link on the login page and request the password link. The link will be sent as long as person meets the requirements to [access VicNet \[pg:1707\]](#).

There are also several less common ways a new volunteer record can have a password assigned. For example, an organization can setup their [application form\(s\) \[pg:0413\]](#) to let new applicants choose their own password. [Help topic 1158 \[pg:1665\]](#) shows an example of this.

Records can also be given a temporary password. With this option, the person uses the temporary password to login to VicNet the first time and then set a permanent password. You can set a temporary password for an individual volunteer or Coordinator on the Vic tab of the record as shown in [help topic 2234 \[pg:1717\]](#). You can set a temporary password for multiple volunteers at once by [tagging the records \[pg:1538\]](#) and then assigning the temporary password from the [Tags menu \[\\_\\_\\_\\_\\_\]](#).

Finally, if organizations use the Import Utility program to transfer existing records into Volgistics, they can choose to import a temporary password when they convert the volunteer records. These temporary passwords will work as described in the paragraph above.

### **Please Note**

For security there is not an automatic way to send an email with the temporary password. We recommend using temporary passwords only in cases where you have a method to tell the person the temporary password without sending an email. For example, if you will call the person, or tell her or him the temporary password in person. Or you have a volunteer orientation where you tell everyone attending their temporary password.

### **Password Strength Rules**

One important way you can increase the security of your account is to set strong password rules that volunteers and Coordinators must follow when creating a new, permanent password. You can require permanent passwords to have upper and lower case characters, be a certain number of characters long, contain both number and letter characters, and contain a character that is not a letter or number (such as an exclamation point symbol). You can learn more about this in the video here.

The password strength rules are not enforced when a temporary password is assigned. However, when the volunteers and Coordinators select a permanent password the first time they sign-in, they will need to select a new password that complies with the strength rules setup in your account.

### **Change Password in VicNet**

In addition to the password strength rules referred to in the

Password Strength Rules

section of this help topic, you can also select to allow volunteers and Coordinators to change their own passwords, and/or require them to change their passwords after a certain number of days. The settings for this are on the [VicNet Ground Rules \[pg:1447\]](#) page.

## Password strength rules

Make new VicNet passwords case sensitive

Must be at least  characters long

Must contain a combination of letters and numbers

Must contain a combination of lower case and uppercase letters

Must contain some characters that are not letters and numbers (such as !#\$%&?)

Never expire

Allow volunteers & coordinators to change their passwords

Do not allow volunteers & coordinators to change their passwords

Expire every  days

When you allow volunteers and Coordinators to change their own passwords, you should enable the Account tab in VicNet so it is available to make the password change. To do this, select [Setup \[pg:0887\]](#) from the menu, expand the VicNet link, and select Account tab.

When you require volunteers and Coordinators to select a new password after a certain number of days, they will be prompted that it is time to select a new password when the limit arrives.

## Reset Passwords

There may be times when a volunteer or Coordinator forgets their password. In these cases, the person can get the link to set a new password by clicking the *Forget your password?* link on the VicNet login page.

Your Logo Here

Login

Enter your email address and your volunteer information center password, and then click the Go button.

Login name:

Password:

[Forget your password?](#) [Help](#)  
[Need a password?](#)

This will take them to a page where they can enter their email address. An email message with a link to create a new password will be sent. The link will remain active for 24 hours. If a volunteer or Coordinator has [opted-in to text messaging \[pg:0323\]](#), the link will be sent by text message also.

As a [System Operator \[pg:0065\]](#), you could also use most of the methods shown in the Initial Password Settings section of this help topic to allow the volunteer or Coordinator to reset their password.

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## Forget your password? (Volunteers and Coordinators)

Help topic 1307

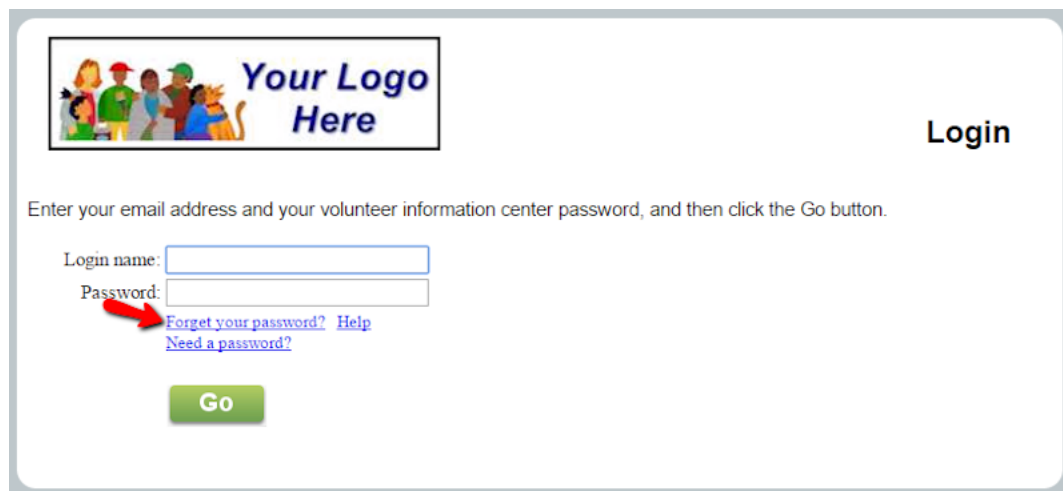
Added or revised 03-23-2017

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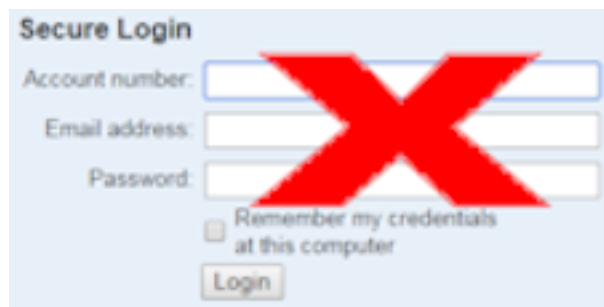
*This help topic is designed to show volunteers and Coordinators how to reset the password they need to login to VicNet.*

### 1. Click the *Forget your password?* link

If you have forgotten the password you use to login to your organization's VicNet portal, start by clicking the *Forget your password?* link on the login page. This will look something like the image below depending on how your organization has setup the account:



The screenshot shows a login interface. At the top left is a placeholder for a logo with the text "Your Logo Here" and an illustration of diverse people. To the right is the word "Login". Below this is the instruction: "Enter your email address and your volunteer information center password, and then click the Go button." There are two input fields: "Login name:" and "Password:". A red arrow points to the "Password:" field, which has two links below it: "Forget your password?" and "Need a password?". At the bottom is a green "Go" button.



The screenshot shows a "Secure Login" form. It has three input fields: "Account number:", "Email address:", and "Password:". Below the "Password:" field is a checkbox labeled "Remember my credentials at this computer". At the bottom is a "Login" button. A large red "X" is overlaid on the entire form, indicating it is not the correct interface for the current step.

### 2. Enter your email address and click the **Go** button

Enter the email address you use to login to the VicNet portal in the *Email address* field and click the **Go** button. The email address entered must match the email address on your volunteer or Coordinator record in order for the password to be sent. The system will send a link you can use to set a new password to your email address. **Please note:** The link will only remain active for 24 hours after it is sent. If you click the link and it says it expired, simply go back and click the *Forget your password?* link again.

**Your Logo Here**

**Login**

Forget your password?

Enter your email address and then click the **Go** button. We will send a **reset link** to you by email.

Email address:  
 **Go** **Cancel**

If you continue to experience difficulty accessing your information, please contact the volunteer office for further assistance.

If you have more than one record in the system that uses the same email address (for example if you have a volunteer and Coordinator record, or family members share an email address), you will see a screen similar to the one shown below. In this case, check the box next to the record (or records) you want to reset the password for and then click the **Go** button.

**Your Logo Here**

**Login**

Select Record(s)

There is more than one volunteer or coordinator record with the given email address (EmilyTate@mailinator.com). Please select from the list and click the **Go** button to **reset** the password(s) you would like. We will send you a password reset link via email.

Emily Tate (coordinator)  
 Emily Tate (volunteer)

**Go** **Cancel**

If you receive a message that the email address you entered does not have an account, it means the system could not find any records with access to Volgistics. The three most common reasons for this are: 1) A typo in the address you entered, or the address on file for your record, 2) There is no record in the system for the address entered, or 3) There is a record, but the access is not approved. Double check that you typed the address correctly. If the address was entered correctly, you will need to contact the volunteer office at the organization you serve with for further assistance.

### 3. Sign-in to your email account to set your password

Go to the email account that the password was sent to, sign-in, and check for new messages. You should receive the temporary password message within a few minutes. However, some email systems and ISPs may delay the delivery of email messages.

If you do not see the message in a few minutes and your email program uses a spam filter, check the junk mail or spam folder for the message.



When you receive the message, click the link in the message to set your password. If for some reason you cannot click the link, highlight the URL address beginning with *https://...* Once the complete address is highlighted, copy it and then paste it into a new web browser window.

You will see a screen that looks similar to the one below:



The screenshot shows a web form for password reset. At the top left, there is a placeholder for a logo with the text "Your Logo Here" and an illustration of diverse people. To the right of the logo is the title "Password Reset". Below the logo, the user is greeted with "Welcome Emily Tate". The instruction "Please enter your new password." is followed by two input fields: "New Password:" and "Confirm Password:". At the bottom of the form, there are two green buttons labeled "Go" and "Cancel".

Enter a new password into both the *New Password* and the *Confirm Password* fields, and then click the **Go** button. The new password you enter must be different than your previous password, *and* it must meet any password strength rules set by your organization.

Remember the new password you enter because this is what you will use to login to Volgistics the next time you access your account.

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## How do I make VicNet so volunteers can only self-schedule for assignments

Help topic 2020

Added or revised 03-07-2016

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If you allow volunteers to [self-schedule \[pg:1494\]](#) at [VicNet \[pg:1724\]](#), you can configure your schedules so volunteers are only allowed to schedule themselves for Assignments that are listed on the [Service tab \[pg:0138\]](#) in their volunteer record.

To do this:

1. Choose Assignments from the [menu \[pg:0215\]](#).
2. Click on the name of any Assignment.
3. Click on the Rules tab for the selected Assignment.
4. In the

*Who can sign-up for this schedule?*

section, select

*Volunteers can schedule themselves or be scheduled by a coordinator if their record has...*

Then check the desired [Status\(es\)](#) [pg:1832] and [Role\(s\)](#) [pg:0103]. If you want volunteers to be able to schedule themselves for their Assignment no matter what their Role is in that Assignment, check all of the Roles.

**Please note:** Your settings here control which volunteers [Coordinators](#) [pg:0163] can place on the schedule for the Assignment also.

Here is an example of how the Rules tab would look if you only want volunteers to be able to self-schedule if they have the Active Status and Roles of either Assigned or Substitute in the Assignment. Volunteers who do not meet these requirements would not see this Assignment as an option to self-schedule for.

The screenshot shows a 'Schedule setup' window with a title bar containing 'Help', 'Save', and 'Cancel' buttons. The main heading is 'Who can sign-up for this schedule?'. There are three radio button options:

- Volunteers cannot schedule themselves or be scheduled by coordinators
- Volunteers can schedule themselves or be scheduled by a coordinator if their record has...
  - One of these volunteer Statuses:
    - Active (indicated by a red arrow)
    - LOA
    - Applicant
    - Prospect
    - Inactive
  - One of these Roles in this assignment:
    - Assigned (indicated by a red arrow)
    - Preference
    - Former
    - Substitute (indicated by a red arrow)
    - Inactive
    - Trainee
- Any volunteer can schedule themselves or be scheduled by a coordinator

Below the radio buttons are two dropdown menus: 'This Flag:' and 'This Type:'.

6. Click the **Save** button.

Repeat these steps for each Assignment for which you want to restrict self-scheduling in this way.

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## Previewing VicNet

Help topic 2159

Added or revised 04-12-2017

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There may be times when you want to see what [VicNet](#) [pg:1724] will look like when a volunteer or [Coordinator](#) [pg:0163] visits. There are two ways you can do this: online, or from a volunteer or Coordinator's record.

### Online

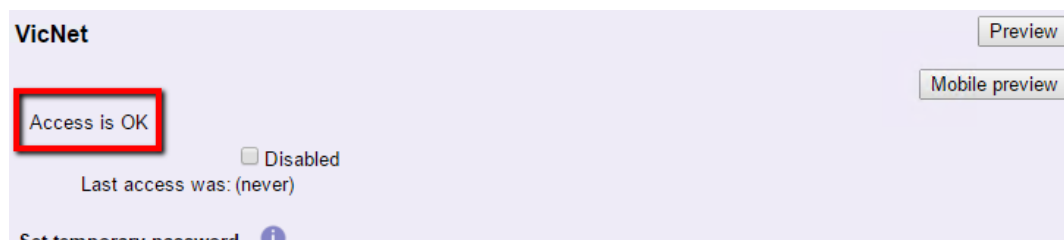
If you've created a [link to VicNet](#) [pg:1491] from your own web site, you can simply click that link, and then enter a valid email address and password for any of the volunteer or Coordinator records in your database that are allowed to access VicNet. **Hint:** You may want to [create a "practice" record](#) [pg:1877] that you use for this kind of testing because the [password](#) [pg:1699] fields are not available to [System Operators](#) [pg:0065].

### From a volunteer or Coordinator's record

You can preview VicNet for any volunteer or Coordinator in your database from the [Vic tab](#) [pg:1810] of their record. This is useful if you need to answer questions volunteers or Coordinators might have about their VicNet records because it enables you to see exactly what they see based on their record.

To preview VicNet for a volunteer or Coordinator:

1. Choose Volunteers (or Coordinators) from the [menu \[pg:0215\]](#).
2. [Locate the record \[pg:1982\]](#) you want to preview, and then click on the name.
3. Click the Vic tab.
4. Check to make sure the tab says "Access is OK," meaning the volunteer or Coordinator can access VicNet.



If the Access box on the Vic tab shows that the volunteer or Coordinator cannot currently access VicNet, you will not be able to preview VicNet from their perspective (you must configure their record so their "Access is OK" first). [Help topic 2161 \[pg:1707\]](#) may be helpful to determine why the person cannot access VicNet.

5. Click the **Preview** button to see the *full-site* view. This is what the person will see if they login on a desktop or laptop computer. Click the **Mobile preview** button to see what the person will see if they login with a mobile device such as a smart phone or tablet.



*The mobile preview will not reflect the actual size of the screen the user will see because this is determined by the user's screen size. The mobile preview will reflect the color and graphics you [setup for the mobile view of VicNet \[pg:1471\]](#).*

#### Related help

- [Help Topic 1073 \[pg:1447\]](#) - VicNet Ground Rules
- [Help Topic 1093 \[pg:1653\]](#) - VicNet for People Who Are Both a Volunteer and a Coordinator
- [Help Topic 1148 \[pg:1654\]](#) - How to Use VicNet: a Brief Guide for Volunteers
- [Help Topic 1158 \[pg:1665\]](#) - How do volunteers get started with VicNet?
- [Help Topic 1159 \[pg:1670\]](#) - Can I put a link to VicNet on the volunteer application form?
- [Help Topic 1175 \[pg:1670\]](#) - Getting Started with VicNet
- [Help Topic 1187 \[pg:1353\]](#) - How to Upload Logo Graphics
- [Help Topic 1198 \[pg:1673\]](#) - Using VicNet for Groups
- [Help Topic 1214 \[pg:1471\]](#) - Customizing VIC Mobile Graphics & Styles
- [Help Topic 1215 \[pg:1676\]](#) - How to Use VicNet Mobile: a Brief Guide for Volunteers
- [Help Topic 1230 \[pg:0166\]](#) - How to Use VicNet: a Brief Guide for Coordinators
- [Help Topic 1305 \[pg:1699\]](#) - Volunteer & Coordinator Passwords
- [Help Topic 2153 \[pg:1491\]](#) - Creating Links to VicNet

[Help Topic 2161 \[pg:1707\]](#) - Who can access VicNet?

[Help Topic 2162 \[pg:1602\]](#) - What to Do if a Volunteer or Coordinator Reports That They Can't Login to VIC

[Help Topic 2233 \[pg:2013\]](#) - Sending All Volunteers Their VicNet Passwords in One Step

[Help Topic 2234 \[pg:1717\]](#) - How do I send an individual volunteer or Coordinator their VicNet password?

[Help Topic 2278 \[pg:1718\]](#) - Track Overall VicNet Usage and Last Access Date

[Help Topic 3020 \[pg:1724\]](#) - VicNet

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## Who can access VicNet?

Help topic 2161

Added or revised 04-12-2017

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You can make [VicNet \[pg:1724\]](#) accessible to any volunteer or [Coordinator \[pg:0163\]](#) you track in Volgistics.

Volunteers and Coordinators access VicNet by clicking the [HTML link \[pg:1491\]](#) you've created on your own web site, and then entering their email address and password.

Of course it isn't always desirable for everyone in your database to be able to use VicNet. For example, you might not want brand new applicants, or inactive volunteers to be able to use VicNet. You can control this by using your setup options to govern access.

You can use the [VicNet Ground Rules \[pg:1447\]](#) page in [Setup \[pg:0887\]](#) to

- Turn volunteer access to VicNet on or off
- Choose the volunteer [Status \[pg:1832\]](#) (or Statuses) volunteers must have to access VicNet (e.g. active, inactive, applicant, etc.).
- Turn Coordinator access to VicNet on or off

If necessary, you can also block an individual volunteer or Coordinator's access to VicNet on the [Vic tab \[pg:1810\]](#) of their volunteer or Coordinator record.

### Volunteers

In order to access VicNet, a volunteer must have:

- An email address recorded in the Email field on the [Core tab \[pg:1868\]](#) of their record.

If you collect volunteer [application forms \[pg:0413\]](#) online, this would be the email address the volunteer enters on their application. If you enter new [records manually \[pg:1877\]](#), this is the email address you've entered for the volunteer. A volunteer must have an email address recorded in their record in order to use VicNet. Generally, anyone who has Internet access also has an email address.

- A volunteer Status that is allowed to access VIC according to the way your [VIC Ground Rules \[pg:1447\]](#) are currently setup.

If you've configured Volgistics so that volunteers with a particular status (such as 'inactive') are not allowed to access VicNet, then any volunteer who currently has such a Status will not be able to login.

- The "Disable access" checkbox on the [Vic tab \[pg:1810\]](#) in their volunteer record must not be checked.

This checkbox is not checked by default. You can check this checkbox if you want to block an individual volunteer's access to VicNet for any reason.

## Coordinators

In order to access VicNet, a Coordinator must have:

- An email address recorded in the Email field on the Coordinator tab in their record.
- The "Disable access" checkbox on the Vic tab in their Coordinator record must not be checked.

This checkbox is not checked by default. You can check this checkbox if you want to block an individual Coordinator's access to VicNet for any reason.

### **New volunteer applicants**

Some organizations want brand new volunteer applicants to have access to VicNet; others prefer to introduce VicNet to volunteers later. Which approach is best for your organization will depend on the nature of your volunteer program and what you allow volunteers to do in VicNet.

For example, a special event organization with many 'one-time' volunteers and a simple application process might want volunteer applicants to have VicNet access as soon as they've submitted their online application form for the purpose of seeing their schedule or updating their email address. On the other hand, a hospital that develops ongoing volunteers and screens new applicants closely might not gain any benefit from giving new applicants VicNet access until some point later in their application process.

In new Volgistics accounts, new applicant records have the volunteer status 'Applicant,' and the 'Applicant' status does not have access to VicNet. This means that new applicants would not have access to VicNet by default.

### If you want new applicants to have access to VicNet

- Set the status on new application forms to one that is allowed to access VicNet.
1. Choose Setup from the [menu \[pg:0215\]](#).
  2. Select 'Online forms.'
  3. Select 'Volunteer Application Forms.'
  4. Click on the name of your volunteer application form.
  5. Scroll down to the "Status" section, and note which status new applicants will have initially.
  6. Choose Setup from the [menu \[pg:0215\]](#).
  7. Select 'VicNet'
  8. Select 'Ground Rules.'
  9. Under "Volunteers can use VIC if their Status is...", be sure the status you noted in step 5 is checked.
  10. Click the **Save** button to save any changes.
- Collect email address and password on your application form.

Be sure your application form asks applicants to provide their email address and choose a password. To do this:

1. Choose Setup from the [menu \[pg:0215\]](#).

2. Select 'Online forms.'
3. Select 'Volunteer application forms.'
4. Click on the name of your volunteer application form.
5. Click the 'Fields' link. The 'Fields' page shows you a list of the fields selected for the form. Be sure 'Email address' and 'Password' are both included in a form section.
6. Click the **Save** button to save any changes.
  - Tailor your application form and email acknowledgement to tell new applicants how they can access their records.

Optionally include instructions on how volunteers can access their records through your web site. These instructions will depend on how you [create your link to VicNet \[pg:1491\]](#). For example, if you create a link called "Volunteer login" on your home page, and your web site address is 'www.mywebsitename.org,' the instructions for new applicants would be something like:

"To review your volunteer record or check your volunteer schedule visit [www.mywebsitename.org](#) and click the 'Volunteer login' link."

You can include these instructions on the receipt conformation applicants see online once they submit their application form, and in the email confirmation you send to new applicants automatically. To do this:

1. Choose Setup from the [menu \[pg:0215\]](#).
2. Select 'Online forms.'
3. Select 'Volunteer application forms.'
4. Click on the name of your volunteer application form.
5. Click the 'Receipt confirmation' link.
6. Add your instructions under "Enter or paste your acknowledgement message here," and "Enter or paste the content of the email confirmation message here."
7. Click the **Save** button to save your changes.

If you **do not** want new applicants to have access to VicNet:

1. Choose Setup from the [menu \[pg:0215\]](#).
2. Select 'Online forms.'
3. Select 'Volunteer application forms.'
4. Click on the name of your volunteer application form.
5. Scroll down to the "Status" section, and note which status new applicants will have initially.

6. Choose Setup from the [menu \[pg:0215\]](#).
7. Select 'Volunteer Information Center.'
8. Select 'Ground Rules.'
9. Under "Volunteers can use VIC if their Status is...", be sure the status you noted in step 5 is **not** checked.
10. Click the **Save** button to save any changes.

This will prevent new applicants from accessing VicNet until you change their volunteer Status to one which is allowed VicNet access on the [Ground Rules \[pg:1447\]](#) page.

Note that it's a good idea for you to collect volunteer email addresses and passwords on your online volunteer application form even if new applicants will not have access to VicNet right away. To do this:

1. Choose Setup from the [menu \[pg:0215\]](#).
2. Select 'Online forms.'
3. Select 'Volunteer application forms.'
4. Click on the name of your volunteer application form.
5. Click the 'Fields;' link. The 'Fields' page shows you a list of the fields selected for the form. Be sure 'Email address' and 'Password' are both included in a form section.
6. Click the **Save** button to save any changes.

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## New VicNet Self Scheduling Features

Help topic 2209

Added or revised 03-25-2008

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On April 1, 2008 the VicNet self-scheduling features will be updated so they are easier to use and to provide some additional capabilities.

Prior to April 2008, the self-scheduling features in VicNet (if you used self-scheduling with the "calendar view" rather than the "list view") initially presented volunteers with a way to choose the day they wanted to volunteer, or the assignment they wanted to serve in. From there volunteers proceeded through a series of steps to select the specific assignment, date, and times they wanted to schedule themselves. This is how the self-scheduling page appeared before this update:



## Volunteer Information Center

### Volunteer information for **George Bailey**

[Home](#) [Mail](#) [My Profile](#) [My Schedule](#) [My Service History](#) [Time Sheet](#) [Account](#)

### Schedule me

Schedule yourself for volunteer duty

Click on the **date** you want to serve

#### March 2008

Sun Mon Tue Wed Thu Fri Sat

						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

[Next month](#)

Or

Click on the **assignment** you want to serve in

[Escort \[Central City\Physical Medicine\]](#)

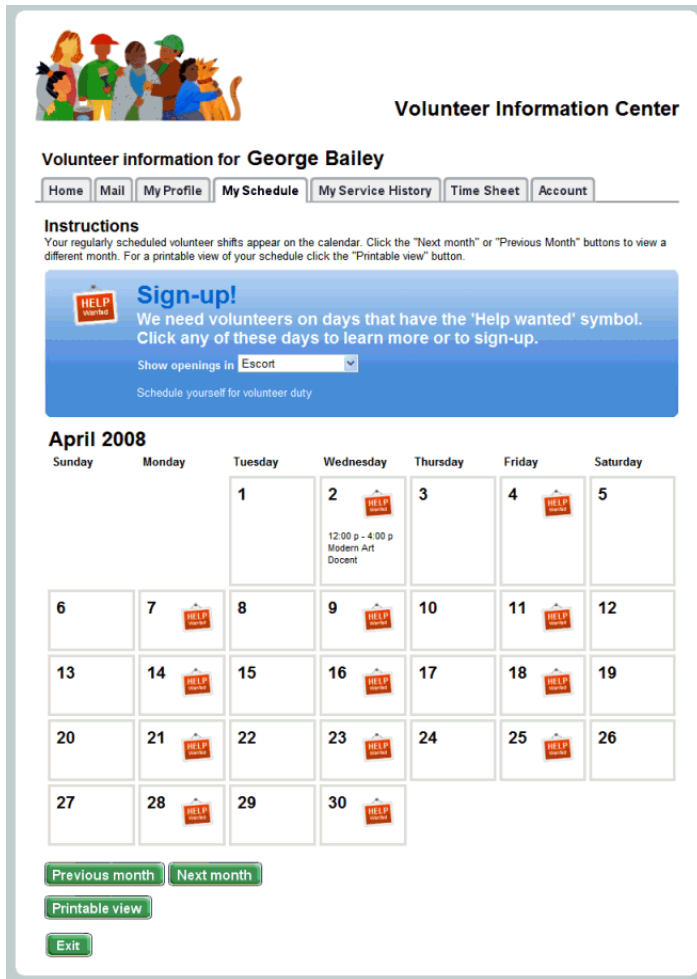
[Modern Art Docent \[Downtown\Volunteer Services\]](#)

[Book Cart \[Central City\Administration\]](#)

[Cancel](#)

With the April 2008 VicNet update, the "Calendar view" self schedule features have been improved, simplified, and combined with the volunteer's monthly schedule view. If you use the self-scheduling features, and you use the Calendar view, the "My Schedule" tab in VicNet will appear as shown here starting April 1, 2008:





**Volunteer Information Center**

Volunteer information for **George Bailey**

Home Mail My Profile **My Schedule** My Service History Time Sheet Account

**Instructions**  
Your regularly scheduled volunteer shifts appear on the calendar. Click the "Next month" or "Previous Month" buttons to view a different month. For a printable view of your schedule click the "Printable view" button.

**Sign-up!**  
We need volunteers on days that have the 'Help wanted' symbol. Click any of these days to learn more or to sign-up.  
Show openings in   
Schedule yourself for volunteer duty

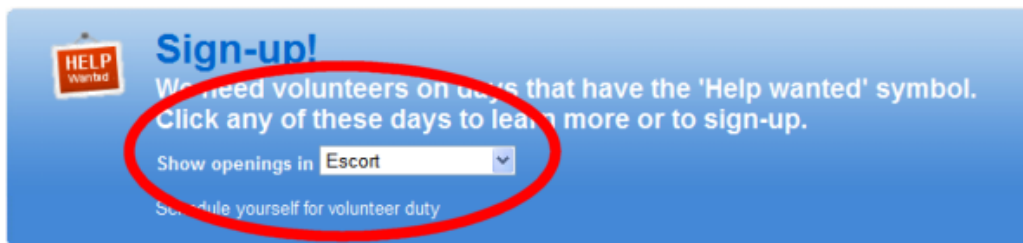
**April 2008**

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
		1	2 12:00 p - 4:00 p Modern Art Docent	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

Previous month Next month  
Printable view  
Exit

Each date where there is an assignment that the volunteer can self-schedule for includes a simple 'Help wanted' icon. Volunteers can click on any date that has this icon to see the assignments and times they can sign-up for on that date, and to actually sign-up.

If a volunteer wants to look for an opening in a specific assignment, they can choose that assignment from the 'Sign-up' drop down list. When they do, the 'Help wanted' icon appears only on the days of the month that have openings in the assignment they select.



**Sign-up!**  
We need volunteers on days that have the 'Help wanted' symbol. Click any of these days to learn more or to sign-up.  
Show openings in   
Schedule yourself for volunteer duty

This list of assignments a volunteer can self-schedule for are controlled by the settings on the Openings tab for each assignment. (The update does not change which assignments volunteers can sign-up for, only the way they are presented).

Volunteers can choose 'All my assignments' from the Sign-up drop down to see when there are openings in any of the assignments they are allowed to self-schedule for.

The update does not change how far in advance volunteers can self-schedule, how often they can self-schedule, or any of the settings that control which assignments they can schedule themselves for.

### **New "My Schedule" tab capabilities for volunteers:**

The April 2008 Self-Scheduling update includes several new "My Schedule" tab capabilities for volunteers who use VicNet.

#### View complete schedules

You can now let volunteers see the complete schedule at VicNet. Volunteers can click on any date to see when they are scheduled and to see which other volunteers are scheduled on that day. If you choose to enable this capability, volunteers can simply click any date on the "My Schedule" tab calendar to see who else is scheduled that day.

To enable this capability:

1. Choose Setup from the menu.
2. Select VicNet.
3. Select Schedule tab.
4. Locate the heading "When volunteers view the schedule, do you want them to see who else is scheduled?" choose the option you prefer.
5. Click the Save button.

There are three options for this setting:

- No

Choose no if you do not want volunteers to see anything other than the dates and times they are scheduled themselves. When you choose this option volunteers cannot see when other volunteers are scheduled at VicNet.

- Yes, but only in assignments they can sign-up for

Choose this option if you want volunteers to see when other volunteers are scheduled each day, but in only in assignments that a volunteer is allowed to schedule themselves for (in other words, only in their own assignments). This is the recommended setting.

- Yes, in all assignments

Choose "Yes, in all assignments" if you want volunteers to see who else is scheduled in all of the assignments you have in your database.

#### Links to assignment profiles

You can now include links to assignment profiles from each assignment name on the My Schedule tab in VicNet. This gives volunteers a way to learn more about each assignment by viewing the job description (and other assignment information you choose to post) for each assignment listed on the VicNet 'My Schedule' tab.

To enable this function:

1. Choose Setup from the menu.
2. Select VicNet.
3. Select Schedule tab.
4. Under Appearance, choose "Include links to assignment profiles for each assignment" if you want these links to appear. Choose "Do not include links to assignment profiles for each assignment" if you do not.
5. Click the Save button.

---

## Sending All Volunteers Their VicNet Passwords in One Step

Help topic 2233

Added or revised 04-27-2016

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You can send volunteers a link to set their [VicNet \[pg:1724\]](#) password either [individually \[pg:1717\]](#), or to an entire group at once.

For example, if you're just getting started with VicNet, you may want to send all of your volunteers (or perhaps just all of your volunteers with the Active [Status \[pg:1832\]](#)) the VicNet password link in a single step. Or, if you've just approved a new group of applicants, you may want to send the password link to all of the new applicants at once. This help topic describes how to do this.

Click on a section of the help topic in the *Contents* box below to jump directly to that section.

### Contents

Password Email Message

Tag the Records To Send VicNet Passwords To

Send the Password Email To the Tagged Volunteers

### Password Email Message

Volgistics has a template for the VicNet password email message. The same template is used for three purposes: 1) when the message is sent by a [System Operator \[pg:0065\]](#) to volunteers, 2) when the message is sent by a System Operator to [Coordinators \[pg:0163\]](#), and 3) when the message is sent because volunteers or Coordinators request a password on the VicNet login page.

When the password email message is sent to a volunteer or Coordinator, the system automatically inserts the person's login name and the password link into the message. Here is how the default password email message appears for a volunteer with the email address of "greentree@hatmail.com."

Below is the password information you requested. Use the login name, and link to set your password, that appear below to access your information at the volunteer information center.

Your login name is: greentree@hatmail.com

Follow the URL to reset your password:

[https://www.volgistics.com/ex/core.dll/process?reset=%3DILM1rHHHidoZ8c3\\*^D95oM5P4f](https://www.volgistics.com/ex/core.dll/process?reset=%3DILM1rHHHidoZ8c3*^D95oM5P4f)

If you continue to have trouble accessing the volunteer information center with the credentials provided, please contact the volunteer office.

We recommend customizing the contents of the password email message to fit your organization's needs. For example, it is often useful to include instructions to the web page on your organization's website where you've [placed the link to the VicNet portal \[pg:1491\]](#).

Here is how you can customize this message for your account:

1. Select [Setup \[pg:0887\]](#) from the [menu \[pg:0215\]](#).
2. Expand the *VicNet* link.
3. Select *Ground rules*.
4. Under *Password email*, enter what you want the email message to say.
5. Click the **Save** button after you are done customizing the password email's content.

Because the same email message is used for all three purposes mentioned at the beginning of this section, you will want to keep the message generic enough to apply to all three purposes while still educating the person on how to log-in. You can see a sample what you could enter as the message's content below:

Expire every  days

### Password email

Volunteers and Coordinators can receive a link to set their password by email. You can customize the content of this message below. Volgistics inserts the person's login name (email address), and the password link, between the Top and Bottom parts

Top part:

Thank you for serving at "My organization." You can find login information for the Volunteer Information Center ([VicNet](#)) below. Click on the link to set your password. After you have successfully set a password, you will be directed to the login page.

Bottom part:

To login to VicNet in the future:

1. Go to our website ([www.organization.org](http://www.organization.org))
2. Select the Volunteer page.
3. Click on the "Volunteer portal" link.
4. Enter your email address and password.

We appreciate your service! Please contact Jessica in Volunteer Services (555-444-3333) if you have trouble logging-in.

What should the subject line be for VicNet password emails?

Volunteer Information Center Password

### Heading

Please keep in mind that the text fields for customizing your password email message will only take plain text. So if you do not place a link to the VicNet portal on your web site, and choose to give the [URL address for the portal \[ \]](#) in your message, the URL address may not always appear as a clickable link when the volunteer or Coordinator receives the email. This will depend on how the recipient's email system treats URL addresses sent in plain text. To help with this, it may be beneficial to put text such as "If this does not appear as a clickable link, please copy and paste this address into your web browser" in your message.

## Password Message and Text Messaging

Please note that if your account has [enabled text messaging \[pg:0321\]](#) and a volunteer has [opted-in \[pg:0323\]](#) to text messaging, they will receive their password link by text as well as email. However, due to the limited length of text messages they will not receive the content of the message setup in the Password Email Message section of this help topic. They will only receive the password link in the text message.

## Tag the Records To Send VicNet Passwords To

You use the [Tags \[pg:1529\]](#) feature to send VicNet passwords to multiple volunteers in a single step. There is not a way to tag [Coordinator \[pg:0163\]](#) records so you will need to send passwords to them [individually \[pg:1717\]](#).

These instructions include an example of how to tag all of the volunteers with an Active [Status \[pg:1832\]](#). However, you can tag any group of volunteers you want to send VicNet passwords to. [Help topic 2139 \[pg:1538\]](#) shows different ways you can tag groups of volunteer records.

To tag all of the volunteers with an Active Status:

1. Select *Volunteers* from the [menu \[pg:0215\]](#).
2. Under the Include section, click the *Clear* link (this clears any Include settings you may have previously set).
3. Under the Include section, select *Active* from the Status dropdown.
4. Click the *All* link near the top of the Volunteers page.

## 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](#)

A list of all records with the Active Status appears.

5. Click the **Tag** button in the top left corner. If more records are in your results than the page displays, a pop-up window will appear asking which records to tag. Select to tag all of the records.

All of your "Active" volunteer records are now tagged.

## Send the Password Message To the Tagged Volunteers

Now you're ready to send all of the tagged volunteers an email with a password link. If your account has [enabled text messaging \[pg:0321\]](#), and the volunteer has [opted-in to text messaging \[pg:0323\]](#), the password will be sent by text and email. However, the content of the message you setup in the Password Email Message section of this help topic will not be sent by text due to the limited number of characters text messages can contain.

1. Select Tags from the [menu \[pg:0215\]](#).
2. Click the **Go** button beside *Send a VicNet password link to the tagged volunteers*.

### Please Note

For security, the link in the password email only stays active for 24 hours after it is sent. If volunteers report they click the link and it says that it expired, simply ask them to click the *Forget your password?* or *Need a password?* link on the VicNet login page. This will send them a new link that they can use to get their password.

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## How do I send an individual volunteer or Coordinator their VicNet password

Help topic 2234

Added or revised 03-23-2017

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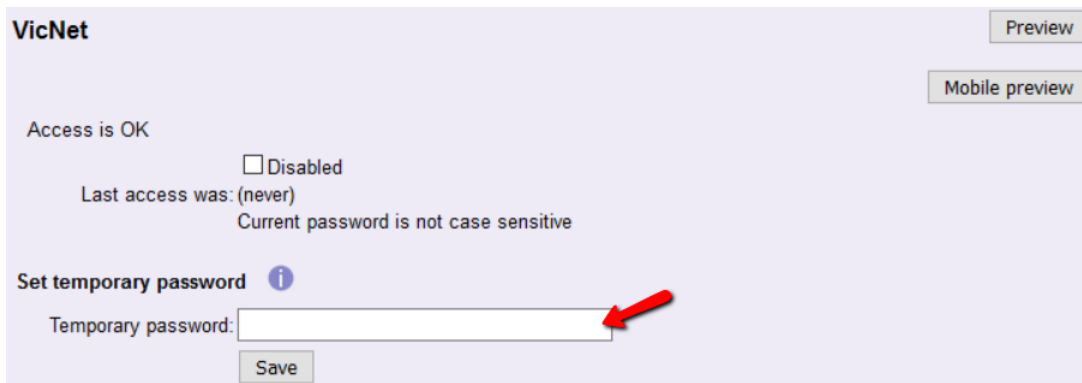
While you can't send passwords to volunteers or [Coordinators \[pg:0163\]](#) through Volgistics, you can set a temporary [VicNet \[pg:1724\]](#) password on the Vic tab of their volunteer record. Or you can send them a reset link so they can choose their own permanent password.

For volunteers, you can also set a temporary password or send a reset link to an entire group of volunteers at once by following the directions in [help topic 2233 \[pg:1714\]](#).

When the volunteer or Coordinator signs-in to VicNet with a temporary password, they will be required to create a permanent password. [Help topic 1307 \[ \]](#) shows how to do this.

### Set temporary password

1. Select *Volunteers* or *Coordinators* from the [menu \[pg:0215\]](#).
2. [Locate the record \[pg:1982\]](#) for the volunteer or Coordinator you need to reset the password for.
3. Select the *Vic* tab.
4. Under *Set temporary password*, enter a password in the *Temporary password* field. Because the volunteer or Coordinator will need to select a permanent password, the temporary password you choose does not need to meet any password strength requirements set up for your account.



The screenshot shows the 'VicNet' interface. At the top right, there are buttons for 'Preview' and 'Mobile preview'. Below these, the text 'Access is OK' is displayed. There is a checkbox for 'Disabled' which is currently unchecked. Below that, it says 'Last access was: (never)' and 'Current password is not case sensitive'. The main section is titled 'Set temporary password' with an information icon. Below this title is a text input field labeled 'Temporary password:'. A red arrow points to the right end of this input field. Below the input field is a 'Save' button.

5. Click the **Save** button. Note that Volgistics will **not** send the temporary password to the volunteer or coordinator, so you'll need to communicate this password to them through another channel.

### Send password reset link

1. Select *Volunteers* or *Coordinators* from the [menu \[pg:0215\]](#).
2. [Locate the record \[pg:1982\]](#) for the volunteer or Coordinator you need to reset the password for.
3. Select the *Vic* tab.
4. Under *Send password reset link*, click the **Send Reset Link** button. The system will generate a unique reset link and send it to the volunteer or Coordinator's email address.



Sending this reset link will not disable the volunteer's current password so they'll still be able to login without the link if they remember their password. If this reset link is not used within 24 hours, it will automatically expire. After that, if the volunteer still needs to reset her password, she'll need a new reset link. Volunteers can get this themselves by clicking the [Forget your password? \[pg:1702\]](#) link on the login page.

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## Track Overall VicNet Usage and Last Access Date

Help topic 2278

Added or revised 04-17-2017

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After you launch the [VicNet \[pg:1724\]](#) module for your organization, you may want to check how your campaign is going. Or, there may be times when you want to see which volunteers are using VicNet, or which ones are not. There are a couple of resources in Volgistics that can help you with this. This help topic explains more about how to use these resources. (By the way, if you're still trying to get the ball rolling with VicNet, you can find help in [help topic 1175 \[pg:1670\]](#) "Getting Started with VicNet.")

### Check Overall VicNet Usage

Volgistics keeps a tally of volunteer and [Coordinator \[pg:0163\]](#) logins to VicNet so it may be useful to review this sum to see if the module is being utilized. Follow these steps to get to this page:

1. Select [Setup \[pg:0887\]](#) from the menu.

2. Expand the *Account management* link.
3. Select *Account status*.
4. Find the *Vic Activity* section to view how many logins have been made to VicNet since the date listed.

The screenshot shows a section titled "Vic Activity" with the following data:

- Volunteer records: 95
- VicNet logins (since April 1, 2017): 241
- VicTouch transactions (since April 1, 2017): 143
- VicDocs uploaded: 481

Each login and transaction count has a "Reset" button next to it. The date "since April 1, 2017" is highlighted with a red box. At the bottom, there is a link: "To change your service level:".

You can click the **Reset** button if you want to set the date to the current date and return the count to zero. This makes it easy to return to the page to see logins since your last visit.

#### Check the Last Login Date for an Individual Volunteer or Coordinator

Volgistics keeps track of the last login date for volunteers and Coordinators on the Vic tab of their record. Follow the steps below to see the most recent login date:

1. Choose Volunteers from the [menu \[pg:0215\]](#) and then [locate the volunteer's record \[pg:1982\]](#). (Select Coordinators from the menu if you want to check a Coordinator.)
2. Open the record and select the Vic tab.
3. The *Last access was* field on the Vic tab shows the date and time the person last logged-in to VicNet.

The screenshot shows a user profile for "VicNet". The "Last access was" field is highlighted with a red box and displays: "Last access was: 04-29-2016 1:37 pm". Other visible text includes "Access is OK", "Disabled", "Set temporary password", "Preview", and "Mobile preview".

If they have never accessed VicNet, this field will show *(never)*:

The screenshot shows a user profile for "VicNet". The "Last access was" field is highlighted with a red box and displays: "Last access was: (never)". Other visible text includes "Access is OK", "Disabled", "Set temporary password", "Preview", and "Mobile preview".

#### Check the Last Login Date for All Volunteers



There is not a way to include the last VicNet access date on [reports \[pg:0595\]](#), but you can include it on the Volunteers page. This allows you to review the dates for multiple volunteers at once and do things such as sort or filter the date column so you can easily see who has never logged-in.

The first thing to check is whether the field is included on the Volunteers page. You can find directions on how to do this in [help topic 1202 \[pg:1381\]](#) "How to customize which fields appear in the volunteer list." Be sure the *Last VicNet Access* field is selected. Remember to click the **Save** button if you make a change.

Once the

*Last VicNet Access*

field is on the Volunteers page, you can do a variety of things with it. Here is an example of how you can find all the volunteer records with an *Active* or *Active (Group)* [Status \[pg:1832\]](#) who have never logged-in to VicNet, and then send them a follow-up message:

1. Select Volunteers from the menu.
2. Click the **Advanced options** button so you can filter with more than one Status.



The screenshot shows the 'Volunteers' page interface. At the top, there are navigation links for each letter of the alphabet (A-Z) and an 'All' link. Below this is an 'Include' section with several dropdown menus for filtering: Status, Type, Flags, Site, Set, Tags, and Kind. Each dropdown menu currently shows 'Any'. Below the filters is a 'Clear' link with an upward-pointing arrow. At the bottom left of the filter section is a button labeled 'Advanced options', which is highlighted with a red arrow.

3. Select *Only these* in the Status section, check the *Active* and *Active (Group)* options, and then click the *All* link.

## 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

**Include**

---

**Status**

Any  
 Only these  
 Not these

Active (Group)       Active       Applicant (Group)  
 Applicant       Candidate       Inactive  
 LOA       Prospect

---

**Type**

Any

4. The page will show all of the volunteers who have the Statuses you selected, and there will be blanks in the date field for the volunteers who have never logged-in.

Name	Tag	Number	Status	Type	Last VicNet Access
Albertson, Veronica	<input type="checkbox"/>	427	Active	Junior	03-12-2017
Alpin, Jerrold	<input type="checkbox"/>	623	Active	Adult	04-04-2017
Alpin, Susan	<input type="checkbox"/>	354	Active	Adult	04-14-2017
Anderson, Susanne	<input type="checkbox"/>	180	Active	Adult	04-10-2017
Appleton, Steve	<input type="checkbox"/>	116	Active	Adult	
Barclay, Andrea	<input type="checkbox"/>	215	Active	Adult	
Barman, Wendy	<input type="checkbox"/>	198	Active (Group)	Group	04-14-2017
Bartowski Marv Sue	<input type="checkbox"/>	333	Active	Adult	

5. To filter the page to only show the volunteers who have never logged in, enter the Regular Expression `^$` into the Search field in the column heading.

Name	Tag	Number	Status	Type	Last VicNet Access
Appleton, Steve	<input type="checkbox"/>	116	Active	Adult	
Barclay, Andrea	<input type="checkbox"/>	215	Active	Adult	
Bartowski Marv Sue	<input type="checkbox"/>	333	Active	Adult	

You can learn more ways to sort and filter the page in the More Tips call out box below.

6. Now you can send an email message to just the volunteers who are shown by clicking the Messages icon to the right of the All link at the top of the page.

[R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#) [All](#)



(total entries)

Status	Type	Last VicNet Access
--------	------	--------------------

Be sure to select the option to send the message to just the shown records or the message will be sent to the volunteers who have signed-in in addition to those who have not.

**Send Message** ✕

Send a message to :

All 171 volunteers.

129 shown volunteers.

If you need help composing and sending the email message, you can find assistance in [help topic 2195 \[pg:0404\]](#) "How to send an email message."

### More Tips

There are several other things you can do with the column headings on the Volunteers page that you may find useful. Here are some examples:

If you want to have the page show all records that have a date recorded (instead of the records that do not have a date recorded), enter the [Regular Expression](#) `[_____]\d` into the *Search* field.

Click the *Last VicNet Access* column heading once to sort the page with all the records with a blank in the field grouped at the top, and the records with a date sorted from least to most recent at the bottom. Click the column

heading again to re-sort the page with the most recent dates at the top, and all the blank records grouped together at the bottom.

Enter two digits for a month to bring up all the records with a date in the month. For example, enter 04 in the *Search* field to bring up all the records with a date in April.

---

## Advertising on VicNet

Help topic 2288

Added or revised 08-23-2012

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While Volgistics never places advertising anywhere in Volgistics, you are allowed to place ads in [VicNet \[pg:1724\]](#) as a fundraising tool for your own organization. Ads you choose to place in VicNet are seen only by your volunteers, and only when they visit VicNet.

Since your VicNet pages are visited by people in your local community; and your volunteers may represent a particular demographic, there may be local businesses that would find an advertising opportunity in VicNet appealing.

If you choose to, your organization may place ads in VicNet for which advertisers pay you a fee, or in exchange for a business' support of your program. For example, a local caterer might cater a volunteer recognition event in exchange for an ad. Or, you might ask a business to underwrite some (or all) of your Volgistics service fee in exchange for an ad.

Note that ads you place in VicNet do not have to be commercial in nature. You can place ads for your organization's own activities, such as upcoming special events, or activities your organization promotes in partnership with others.

Ads can include links to the advertiser's web site. These links open in a new browser window so the volunteer will continue to have VicNet open in its original browser window.

Advertising in VicNet is permitted under these guidelines

- Ads may be placed on the VicNet Home tab using up to four optional "Message" boxes.
  - Each message box may contain one graphic image. Graphics have specific file size and image dimension limitations. The maximum file size is 20Kb, and the maximum image dimension is 500 pixels high by 200 pixels wide. Graphic images may be provided in GIF, JPG, or PNG files.
  - Ads must meet general community standards for acceptable advertising.
  - Volgistics has no responsibility for ad pricing, ad sales, or collection of advertising fees. These activities are your responsibility.
  - Creating advertising images or content is the responsibility of your organization or the advertiser.
- Volgistics reserves the right to remove any advertising that does not conform to these guidelines.

To place an advertisement on the VicNet Home tab:

1. Choose Setup from the [menu \[pg:0215\]](#).
2. Select 'VicNet.'
3. Select the 'Home tab' link.

4. There are four optional "message boxes." Choose the "Message box" you want to use for your advertisement; and then uncheck the "Omit message box" checkbox for the message box you choose.
5. Optionally enter any text you want to appear above or below the message box graphic in the fields provided.
6. To upload a graphic image for the ad, click the **Change image** button, and then follow the directions for uploading the image (the image you want to upload must be located on your computer or network).
7. If you want the ad to link to another web site, add the web site's address in the "Link" field.
8. Click the **Save** button.

The ad will now appear on the Home tab in VicNet.

To remove an advertisement from the VicNet Home tab:

1. Choose Setup from the menu.
2. Select 'VicNet.'
3. Select the 'Home tab' link.
4. There are four optional "message boxes." Locate the "Message box" that contains the ad you want to remove, and then check its "Omit message box" checkbox.
5. Click the **Save** button.

The ad will no longer appear on the Home tab in VicNet.

## Related help

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### VicNet

Help topic 3020

Added or revised 03-23-2017

---

With Volgistics, your volunteer tracking system is not constrained by your office computer or network. You can involve volunteers and others in a variety of activities *online* with the VicNet module. VicNet is an optional module you can add so volunteers can. . .

- View and manage their volunteer schedules
- Sign-up for vacant schedule openings
- Print their schedules
- Keep their personal information up-to-date
- Post their hours
- Receive news and messages from the volunteer office
- Check their service records, and print their own service reports
- Change their VicNet passwords
- Opt-in or out of text messaging and update their message preferences

In addition to giving volunteers a way to interact, you can also use VicNet to give [Coordinators \[pg:0163\]](#) (assignment level supervisors) access. With VicNet, Coordinators can:

- Manage the schedule for their volunteers
- View and print the schedule for their volunteers
- View and print lists of their volunteers
- Update key personal information about their volunteers
- Change their VicNet passwords
- Opt-in or out of text messaging and update their message preferences

Depending on your needs, you can use VicNet to give access to both volunteers and Coordinators, only to volunteers, or only to Coordinators.

VicNet is an optional module. When you use Volgistics, you don't have to use VicNet unless it makes sense for your organization. VicNet is a great tool for organizations that have volunteers who serve on an ongoing basis and for organizations that want assignment level supervisors to be able to manage the volunteer schedule for their areas.

VicNet is accessible only by volunteers and Coordinators you track in Volgistics. VicNet uses the same level of [Internet security \[pg:0181\]](#) as Volgistics, and only volunteers and Coordinators you authorize to use VicNet have access. Volunteers and Coordinators login to VicNet using a login name and password, and they can see only their own information.

Like Volgistics, the VicNet module is a hosted application, so there's no software to install or maintain on your own computer or network. This help topic explains more about how VicNet works, and what volunteers and Coordinators can see.

***Please Note:***

*This help topic shows the full-site view of VicNet. This is the view your users will see if they access VicNet from a desktop or laptop computer. Users may also access the system from a mobile device such as a smart phone or tablet and in this case their view will be different. You can learn more about the mobile view of VicNet in [help topic 1214 \[pg:1471\]](#).*

You can go directly to a section of the help topic by clicking the link for that section in the Contents window below:

**Contents**

[How VicNet Works](#)

[VicNet for Volunteers](#)

Home Tab

Mail Tab

My Profile Tab

My Schedule Tab

My Service History Tab

Time Sheet Tab

Account Tab

[VicNet for Coordinators](#)

Volunteers Tab for Coordinators

My Schedule Tab for Coordinators

[Controlling Access to VicNet](#)

[Previewing VicNet](#)

## **How VicNet Works**

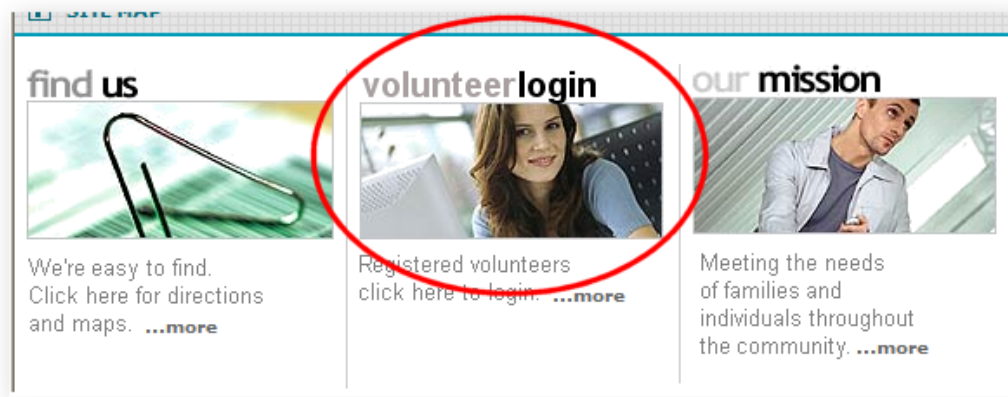
Volunteers and Coordinators get to VicNet online *through* your organization's own web site. To make this happen, you add a simple HTML link to one or more of your web pages.

Help topic 2153 [pg:1491] explains how to create a link to VicNet.

Your link can be located anywhere you'd like on your web site (even in multiple locations). It can be a simple text link (with any text you choose) like this:

## **Volunteer Login**

Or a graphic link, like this:



There's no software to install on your web server, and no other changes are required to your web site.

Having volunteers and Coordinators access VicNet through your own web site makes lots of sense. Users don't have to remember any web address other than your own, and it brings more visitors to your web site. It will appear to the volunteers and Coordinators that VicNet is part of your own web site (see the Branding sidebar below). However, the VicNet pages are actually powered by the Volgistics system so there's no additional bandwidth usage or overhead on your web server.

When volunteers or Coordinators click the VicNet link on your web site, they'll see a login page similar to this one where they enter their login name and password (you'll learn more about assigning VicNet login names and passwords in the Controlling Access to VicNet section below).

**Your Logo Here**

**Login**

Enter your email address and your volunteer information center password, and then click the Go button.

Login name:

Password:

**Go**

[Forget your password?](#) [Help](#)

[Close this window](#) | [Privacy policy](#)

## Branding

To use VicNet, volunteers and Coordinators don't have to go to the Volgistics web site, or even know anything at all about Volgistics. You can customize VicNet to match the graphic style of your own web site (if you want to), and even call it something other than

### *VicNet*

if you'd like. You can find information on how to customize VicNet (and other Volgistics features volunteers see) to appear similar to your organization's web site by watching our webinar on

### Customizing Your Online Forms

You will also need to customize the mobile view for when users access VicNet from a tablet or smart phone. You can find information on how to do this in [help topic 1214 \[pg:1471\]](#).

## **VicNet for Volunteers**

This section gives a review of the tabs available in VicNet and examples of what your volunteers may see. You can control which tabs and fields volunteers see in VicNet so your VicNet setup may not appear exactly the same. There's more about customizing VicNet in the help topics mentioned in the descriptions below.

In addition to this help topic, it may be helpful to watch the training videos designed to teach volunteers how to use VicNet. These videos can give you a good idea of the different ways VicNet can be set up, as well as giving you a chance to see what volunteers will see when they use the system. You can find the training videos here.

### **Home Tab**

A Home tab like the one shown below appears once a volunteer logs-in. You can customize your Home tab to include the latest volunteer News, links to other web pages, volunteer program statistics, and – if you choose – even ads (see [help topic 2288 \[pg:1723\]](#) for directions on placing advertisements on the Home tab).



You can find more information on how to configure the VicNet Home tab for your account in [help topic 2019 \[pg:1486\]](#).

## Mail Tab

In addition to regular [Internet email \[pg:0404\]](#) and [text messages \[pg:0343\]](#), Volgistics also lets you communicate with volunteers through VicNet. Volgistics [System Operators \[pg:0065\]](#) can send a message to individual volunteers, specific groups of volunteers (such as all volunteers who have a [specific assignment \[pg:0399\]](#), who are [scheduled on a specific date \[pg:0401\]](#), or who are in a [specific Set \[pg:0396\]](#)), or all volunteers through VicNet. You can find information on how to send Vic mail messages in [help topic 1127 \[pg:0315\]](#).

The Mail tab in VicNet is where volunteers see these messages. New messages appear on top and a list of read messages appears on the bottom so volunteers can re-read a message if they choose.



## Volunteer Information Center

### Volunteer information for **Andrea Campbell**

[Home](#) [Mail](#) [My Profile](#) [My Schedule](#) [My Service History](#) [Time Sheet](#) [Account](#)

#### Instructions

To view a message, simply click on the message subject.

#### New messages

Subject	Sent
<b>Bedford Falls 10K</b>	09-04-2014
If you haven't heard, we are proud to be a co-sponsor of this year's Bedford Falls 10K run. This event is an important fund raiser for our organization, plus it promotes health and wellness.	
This year's 10K run will be held on Saturday, October 18th at 9:30 am. As a co-sponsor, we will be responsible for staffing the registration booth from 7:00 am - 8:00 pm on Friday, October 17th, as well as from 7:00 am - 9:00 am on the morning of the race.	
Registration booth staff will be responsible for handing out race day packets and t-shirts to registered participants. If you're interested in helping us staff the booth, please call Carol at 555-892-3391.	
Thank you, Carol Luden	

[Close](#)

#### Old Messages

Subject	Sent
New Parking Permit Needed	09-04-2014


[Exit](#)

[Close this window](#) | [Privacy policy](#)

You can customize whether or not this page appears, and the directions that appear on this page, by selecting [Setup \[pg:0887\]](#) from the menu, expanding the VicNet link, and selecting *Mail tab*.

### My Profile Tab

You can use the VicNet *My Profile* tab to let volunteers see – and optionally update – their volunteer record. For example, volunteers can keep their own email address, interests, skills, and availability up-to-date. Before VicNet, keeping these kinds of records current meant having to collect the new information and then manually update the records yourself--a time consuming task. With VicNet, volunteers can do this themselves as soon as there's a change in their information. The changes they make will automatically show on the volunteer records in your account.



## Volunteer Information Center

**Volunteer information for Andrea Campbell**

Home
Mail
My Profile
My Schedule
My Service History
Time Sheet
Account


**Instructions**  
The following information is currently on file in your volunteer record. To update your records, enter your new information in the spaces provided. Click any of the "Save" buttons to save your changes or additions.

**Contact Information**

First name:   
 Last name:   
 Title:  ▼  
 Type:   
 Street 1:   
 Street 2:   
 Street 3:   
 City:   
 State:  ▼ Zip:   
 Home phone:   OK to call me here  
 Work phone:   OK to call me here

Save

**Photo**  
Click the Upload link if you would like to upload a photo of yourself.



[Upload](#)

**Demographics**  
You may optionally provide the following information. It is used only to help us get a better idea of the demographic make-up of our volunteers.

Date of birth:  ▼  ▼  ▼ (year optional)  
 T-Shirt Size:  ▼  
 Ethnicity:  ▼

Save

**Skills & Experience**  
In which of these areas do you feel you have moderate to excellent skill? Check all that apply.

<input type="checkbox"/> Cash Register	<input type="checkbox"/> Computer - Advanced	<input checked="" type="checkbox"/> Computer - Basic
<input checked="" type="checkbox"/> Computer - Intermediate	<input checked="" type="checkbox"/> Data Entry	<input type="checkbox"/> Diabetes Education
<input type="checkbox"/> Office Work	<input type="checkbox"/> Patient Assistance	<input type="checkbox"/> Patient Companionship
<input type="checkbox"/> Spiritual Counseling	<input type="checkbox"/> Telephone Answering	<input type="checkbox"/> Writing/Publishing

Save

**Availability**  
Please indicate the days and times you are usually available to volunteer.

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Morning:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Afternoon:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Volgistics gives you lots of control over the way the *My Profile* tab works. For each field, you can choose to hide the field altogether so volunteers never see it; display a field's content in a read-only mode so volunteers can see it but not change it; or display it in a read-write mode so volunteers can see and update the field's content. You can also tailor the headings and instructions that appear for each section of the tab.

Help topics [1178 \("VicNet My Profile Tab"\) \[pg:1456\]](#) and [1034 \("VicNet My Profile Tab Photo page"\) \[pg:1444\]](#) have information on how to configure the *My Profile* tab in your account.

## My Schedule Tab

If you use Volgistics to schedule volunteers, they can click the

### *My Schedule*

tab in VicNet to see or print their schedule. You can control whether or not this tab appears for volunteers, along with the directions on this page. [Help topic 1171 \[pg:1453\]](#) has information on how to do this.



## Volunteer Information Center

### Volunteer information for Andrea Campbell

- Home
- Mail
- My Profile
- My Schedule
- My Service History
- Time Sheet
- Account

#### Instructions

Your regularly scheduled volunteer shifts appear on the calendar. Click the "Next month" or "Previous Month" buttons to view a different month. For a printable view of your schedule click the "Printable view" button.

[Prev month](#)
[Next month](#)
**September 2014**

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	<b>1</b> Labor Day	<b>2</b> 7:00 a - 11:00 a Welcome Center Desk	<b>3</b> 7:00 a - 11:00 a Welcome Center Desk	<b>4</b> 7:00 a - 11:00 a Welcome Center Desk	<b>5</b> 7:00 a - 11:00 a Welcome Center Desk	<b>6</b>
<b>7</b>	<b>8</b> 7:00 a - 11:00 a Welcome Center Desk	<b>9</b> 7:00 a - 11:00 a Welcome Center Desk	<b>10</b> 7:00 a - 11:00 a Welcome Center Desk	<b>11</b> 7:00 a - 11:00 a Welcome Center Desk	<b>12</b> 7:00 a - 11:00 a Welcome Center Desk	<b>13</b>
<b>14</b>	<b>15</b> 7:00 a - 11:00 a Welcome Center Desk	<b>16</b> 7:00 a - 11:00 a Welcome Center Desk	<b>17</b> 7:00 a - 11:00 a Welcome Center Desk	<b>18</b> 7:00 a - 11:00 a Welcome Center Desk	<b>19</b> 7:00 a - 11:00 a Welcome Center Desk	<b>20</b>
<b>21</b>	<b>22</b> 7:00 a - 11:00 a Welcome Center Desk	<b>23</b> 7:00 a - 11:00 a Welcome Center Desk	<b>24</b> 7:00 a - 11:00 a Welcome Center Desk	<b>25</b> 7:00 a - 11:00 a Welcome Center Desk	<b>26</b> 7:00 a - 11:00 a Welcome Center Desk	<b>27</b>
<b>28</b>	<b>29</b> 7:00 a - 11:00 a Welcome Center Desk	<b>30</b> 7:00 a - 11:00 a Welcome Center Desk				

[Prev month](#)
[Next month](#)

[Printable view](#)

[Exit](#)

Close this window | [Privacy policy](#)

You can also optionally give volunteers the ability to add or remove themselves from schedules by setting up self-scheduling for your account. Scheduling works dynamically in real-time, so volunteers will only see **openings** [pg:0776] on the schedule while they exist. Once a schedule is filled, no one else can add themselves to that schedule (unless an opening becomes available). You can set up self-scheduling to use a calendar format as shown below:



# Volunteer Information Center

Volunteer information for **Andrea Campbell**

- Home
- Mail
- My Profile
- My Schedule
- My Service History
- Time Sheet
- Account

### Instructions

Your regularly scheduled volunteer shifts appear on the calendar. Click the "Next month" or "Previous Month" buttons to view a different month. For a printable view of your schedule click the "Printable view" button.

### Sign-Up!

We need volunteers on days that have the 'Help wanted' symbol. Click any of these days to learn more or to sign-up.

Show openings in All my assignments

Schedule yourself for volunteer duty

[Prev month](#)
[Next month](#)
**September 2014**

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1 Labor Day	2 7:00 a - 11:00 a Welcome Center Desk	3 7:00 a - 11:00 a Welcome Center Desk	4 7:00 a - 11:00 a Welcome Center Desk	5 7:00 a - 11:00 a Welcome Center Desk	6	
7	8 7:00 a - 11:00 a Welcome Center Desk	9 7:00 a - 11:00 a Welcome Center Desk	10 7:00 a - 11:00 a Welcome Center Desk	11 7:00 a - 11:00 a Welcome Center Desk	12 7:00 a - 11:00 a Welcome Center Desk	13
14	15 7:00 a - 11:00 a Welcome Center Desk	16 7:00 a - 11:00 a Welcome Center Desk	17 7:00 a - 11:00 a Welcome Center Desk	18 7:00 a - 11:00 a Welcome Center Desk	19 7:00 a - 11:00 a Welcome Center Desk	20
21	22 7:00 a - 11:00 a Welcome Center Desk	23 7:00 a - 11:00 a Welcome Center Desk	24 7:00 a - 11:00 a Welcome Center Desk	25 7:00 a - 11:00 a Welcome Center Desk	26 7:00 a - 11:00 a Welcome Center Desk	27 
28	29 7:00 a - 11:00 a Welcome Center Desk	30 7:00 a - 11:00 a Welcome Center Desk				

- [Prev month](#)
- [Next month](#)
- [Printable view](#)
- [Exit](#)

Close this window | Privacy policy

With the calendar view format, dates with schedule openings the volunteer is qualified to fill appear with the *Help Wanted* icon. Volunteers can click on any of these dates to add themselves to the schedule. If volunteers need to remove themselves from the schedule, they can click on a specific date they are scheduled.



## Volunteer Information Center

### Volunteer information for **Andrea Campbell**

[Home](#) [Mail](#) [My Profile](#) [My Schedule](#) [My Service History](#) [Time Sheet](#) [Account](#)

Schedule for

**Thursday, September 25, 2014**

**You are scheduled**

7:00 a to 11:00 a

**Welcome Center Desk** [Description](#)

Can't serve on this date? Click the Remove me button to remove yourself from these times

[Remove me](#)

### Schedule

**Welcome Center Desk** [Description](#)

7:00 a to 11:00 a Campbell, Andrea

11:00 a to 3:00 p Mata, Christina

3:00 p to 7:00 p Stover, Heather


[Calendar view](#)

[Exit](#)

[Close this window](#) | [Privacy policy](#)

You can control whether or not volunteers have the ability to remove themselves from the schedule, as well as the number of days before they are scheduled that they are allowed to remove themselves. If volunteers remove themselves from a date on the schedule, you can set up your account so you **receive an alert** [ ] notifying you of the change. The opening a volunteer leaves behind when they remove themselves appears immediately on the schedule so that others can sign-up to serve in their place.

You can also set up the self-scheduling feature to use a list format as shown below:



## Volunteer Information Center

**Volunteer information for Andrea Campbell**

Home
Mail
My Profile
My Schedule
My Service History
Time Sheet
Account

**Instructions**  
Your regularly scheduled volunteer shifts appear on the calendar. Click the "Next month" or "Previous Month" buttons to view a different month. For a printable view of your schedule click the "Printable view" button.

**Sign-Up!**  
Schedule yourself for volunteer duty

	Date	Assignment	From	To	
<input type="checkbox"/> Check to sign-up	September 4, 2014 (Thursday)	Welcome Center Desk [Info Desk]	7:00 p	11:00 p	
<input checked="" type="checkbox"/> You are scheduled for	September 4, 2014 (Thursday)	Welcome Center Desk [Info Desk]	7:00 a	11:00 a	<a href="#">Remove me</a>
<input type="checkbox"/> Check to sign-up	September 5, 2014 (Friday)	Welcome Center Desk [Info Desk]	7:00 p	11:00 p	
<input checked="" type="checkbox"/> You are scheduled for	September 5, 2014 (Friday)	Welcome Center Desk [Info Desk]	7:00 a	11:00 a	<a href="#">Remove me</a>
<input checked="" type="checkbox"/> You are scheduled for	September 8, 2014 (Monday)	Welcome Center Desk [Info Desk]	7:00 a	11:00 a	<a href="#">Remove me</a>
<input checked="" type="checkbox"/> You are scheduled for	September 9, 2014 (Tuesday)	Welcome Center Desk [Info Desk]	7:00 a	11:00 a	<a href="#">Remove me</a>
<input checked="" type="checkbox"/> You are scheduled for	September 10, 2014 (Wednesday)	Welcome Center Desk [Info Desk]	7:00 a	11:00 a	<a href="#">Remove me</a>
<input type="checkbox"/> Check to sign-up	September 11, 2014 (Thursday)	Welcome Center Desk [Info Desk]	7:00 p	11:00 p	
<input checked="" type="checkbox"/> You are scheduled for	September 11, 2014 (Thursday)	Welcome Center Desk [Info Desk]	7:00 a	11:00 a	<a href="#">Remove me</a>
<input type="checkbox"/> Check to sign-up	September 12, 2014 (Friday)	Welcome Center Desk [Info Desk]	7:00 p	11:00 p	
<input checked="" type="checkbox"/> You are scheduled for	September 12, 2014 (Friday)	Welcome Center Desk [Info Desk]	7:00 a	11:00 a	<a href="#">Remove me</a>
<input checked="" type="checkbox"/> You are scheduled for	September 15, 2014 (Monday)	Welcome Center Desk [Info Desk]	7:00 a	11:00 a	<a href="#">Remove me</a>
<input checked="" type="checkbox"/> You are scheduled for	September 16, 2014 (Tuesday)	Welcome Center Desk [Info Desk]	7:00 a	11:00 a	<a href="#">Remove me</a>
<input checked="" type="checkbox"/> You are scheduled for	September 17, 2014 (Wednesday)	Welcome Center Desk [Info Desk]	7:00 a	11:00 a	<a href="#">Remove me</a>
<input type="checkbox"/> Check to sign-up	September 18, 2014 (Thursday)	Welcome Center Desk [Info Desk]	7:00 p	11:00 p	
<input checked="" type="checkbox"/> You are scheduled for	September 18, 2014 (Thursday)	Welcome Center Desk [Info Desk]	7:00 a	11:00 a	<a href="#">Remove me</a>

Click the "Remove me" button to remove yourself from the schedule for a selected assignment and date

[Continue](#) Click Continue to schedule yourself for the assignments and dates selected above  
[Printable view](#)  
[Cancel](#)  
[Exit](#)

Close this window | [Privacy policy](#)

The calendar format is best for organizations that have ongoing volunteer participation, while the list format is well suited for special events that have volunteer needs for a fixed number of days.

You can find directions on how to configure the *My Schedule* tab to allow self-scheduling in [help topic 2170 \[pg:1494\]](#).

### My Service History Tab

If you track volunteer [service information \[pg:1581\]](#) in Volgistics, volunteers can select the *My Service History* tab in VicNet to see their service hours and other information. You can show volunteers just their service totals, or all their service history since they began volunteering. Volunteers can create printable views of their service records if they want a printed service report for themselves (for their tax records, for example).

If volunteers have [mandatory service \[pg:1419\]](#) (a certain number of hours they must perform by a given date), they can see their progress in fulfilling this goal on the *My Service History* tab.

**Your Logo Here**

**Volunteer Information Center**

**Volunteer information for Andrea Campbell**

Home | Mail | My Profile | My Schedule | **My Service History** | Time Sheet | Account

**Instructions**  
Click the "Printable view" button for a printable view of this information.

**Jun.-Sept. 2014 Service Challenge Service Goal**

	Hours
Service goal:	320:00
Recorded so far:	244:00
Service remaining:	76:00
Started:	06-01-2014
Target date:	09-30-2014
Days left:	26

Progress:

0% | 25% | 50% | 75% | 100%

**Totals**  
Start date: December 26, 2007  
Year-to-date hours: 676:00  
Life hours: 2,754:25

**Service by year**  
Click on a year to view your records for the year.

Year	Hours	Merit hours	Absences
2014	676:00	929:30	1
2013	1,013:29	1,013:29	3
2012	1,016:00	1,016:00	0
2010	3:40	3:40	0
2009	22:56	22:56	0
2008	22:20	22:20	0
<b>Life total:</b>	<b>2,754:25</b>	<b>3,007:55</b>	<b>4</b>

Printable view

Exit

Close this window | Privacy policy

You can control whether or not volunteers see this tab in VicNet, plus customize which fields appear. [Help topic 1207 \[pg:1465\]](#) has information on how to do this.

### Time Sheet Tab


If you'd like volunteers to post their own volunteer [service information \[pg:1581\]](#) online, they can do this using the VicNet

#### Time Sheet

tab. Entries the volunteers make will automatically be transferred to the Service tab of their volunteer record so you can [view the volunteer's service \[pg:1579\]](#) as a [System Operator \[pg:0065\]](#).

You can customize the time sheet to suit a variety of service recordkeeping needs. For example, you can limit the time period for which service can be posted; collect service on a daily or monthly basis; and even add fields to collect additional [service measures \[pg:1557\]](#) (for example, the number of *miles driven* or *meals delivered*). You can optionally audit the time sheet entries that volunteers make. [Help topic 1072 \[pg:1408\]](#) explains how to set up your account so you can audit entries a volunteer makes from the *Time Sheet* tab.




Volunteer Information Center

**Volunteer information for Andrea Campbell**

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[My Schedule](#)
[My Service History](#)
[Time Sheet](#)
[Account](#)

**Instructions**  
To post your hours, enter your service information in the Time Sheet box and then click the "Continue" button.

**Time Sheet**

What was the date of your service?

**August 2014**

S	M	T	W	T	F	S
		25	26	27	28	29
		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	31					
	<input type="radio"/>					

**September 2014**

S	M	T	W	T	F	S
		1	2	3	4	
		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	

What times did you serve? 8 : :00 am until 9 : :00 am

Which assignment did you serve in? Choose one

**Continue**

**Your recent service entries:**

Date	Assignment	Hours
08-29-2014	Welcome Center Desk [Main Hospital/Info Desk]	4:00
08-28-2014	Welcome Center Desk [Main Hospital/Info Desk]	4:00
08-27-2014	Welcome Center Desk [Main Hospital/Info Desk]	4:00
08-26-2014	Welcome Center Desk [Main Hospital/Info Desk]	4:00
08-25-2014	Welcome Center Desk [Main Hospital/Info Desk]	4:00

For your complete service history select the "My Service History" tab.

**Exit**

Close this window | [Privacy policy](#)

The Time Sheet tab can be configured to appear for all volunteers, for no volunteers, or for just the volunteers with a certain [Type or Flag \[pg:0212\]](#). [Help topic 1204 \[pg:1460\]](#) shows how to control whether or not the *Time Sheet* tab appears in your account, and which fields appear on it.

### Account Tab

The Account tab is where volunteers will select a permanent password after [logging-in with a temporary password \[pg:1702\]](#), change their permanent password, and [opt-in or opt-out \[pg:0323\]](#) of [text messaging \[pg:0352\]](#).

VicNet

Page 1736

You can set up the instructions that appear on the Account tab, and control access, by selecting [Setup \[pg:0887\]](#) from the menu, expanding the VicNet link, and selecting *Account tab*. If your account has [text messaging enabled \[pg:0321\]](#), there is not a way to disable the Account tab. This is because it is required so that volunteers can opt-in and out of text messaging.

## **VicNet for Coordinators**

If you use Volgistics to track assignment level supervisors as [Coordinators \[pg:0163\]](#), you can give these Coordinators access to VicNet. Coordinators do not need to be Volgistics [System Operators \[pg:0065\]](#), and there's no limit to the number of Coordinators you can track in Volgistics. Because Coordinators are people who manage or supervise specific volunteer assignments, they use VicNet a bit differently than volunteers.

The first thing to note is that there may be cases where one person has a volunteer record

*and*

a Coordinator record in your account. In this case, the volunteer record is used to track things such as the service hours, scheduling, and [Checklist \[pg:0142\]](#) information for the person, while the Coordinator record is used by them to manage the assignment(s) they oversee. [Help topic 1093 \[pg:1653\]](#) explains how the VicNet login process may differ for these individuals.

Coordinators can have access to 5 tabs in VicNet: Home, Mail, Volunteers, My Schedule and Account. The Home, Mail and Account tabs are very similar in VicNet for volunteer and Coordinator records. Please refer to the sections of the help topic above for information on how these work for Coordinator records. This section of the help topic will explain more about how the Volunteers and My Schedule tabs work for Coordinators.

In addition to this help topic, it may be helpful to watch the training videos designed to teach Coordinators how to use VicNet. These videos can give you a good idea of the different ways VicNet can be set up, as well as giving you a chance to see what Coordinators will see when they use the system. You can find the training videos here.

## Volunteers Tab for Coordinators

Volunteers and Coordinators are linked through the assignments they have in common. You can learn how to set up a Coordinator to oversee certain assignments in the [Connecting Coordinators and Assignments](#) [ ] section of help topic 1111. The Volunteers tab of the Coordinator record lists volunteers who have certain [Status\(es\)](#) [pg:1832] as well as a certain [Role\(s\)](#) [pg:0103] in an assignment(s) the Coordinator oversees.

**Your Logo Here**

**Volunteer Information Center**

Coordinator information for **Betty Valasquez**

Home | Mail | **Volunteers** | My Schedule | Account

**Volunteers**

Name	Assignment	Role
Becker, Anna Home: (956) 794-8872 Cell: (207) 620-4275 annabecker@spambob.com	Gift Shop Helper [Main Hospital/Gift Shop]	Assigned
Derosier, Gladys Cell: (201) 637-2272 gladysjerosier@dodgit.com	Gift Shop Helper [Main Hospital/Gift Shop]	Assigned
Gatto, Keith Home: (583) 232-7834 Cell: (214) 866-2536 karengatto@dodgit.com	Gift Shop Helper [Main Hospital/Gift Shop]	Assigned
Hamm, Michele Cell: (214) 637-0918 michelemhamm@dodgit.com	Gift Shop Helper [Main Hospital/Gift Shop]	Assigned
Kirkland, Tammy tammykirkland@mailinator.com	Gift Shop Helper [Main Hospital/Gift Shop]	Assigned
Knox, Harold Cell: (214) 747-1090 haroldknox@mailinator.com	Gift Shop Helper [Main Hospital/Gift Shop]	Assigned
Kurt, Kristie kristiedkurt@mailinator.com	Gift Shop Helper [Main Hospital/Gift Shop]	Assigned
Mauk, Joy joyjmauk@dodgit.com	Gift Shop Manager [Main Hospital/Gift Shop]	Assigned
McOhee, Emilia Home: (506) 385-0419 Cell: (202) 365-7728 emiliammoghee@dodgit.com	Gift Shop Helper [Main Hospital/Gift Shop]	Assigned
Perry, Victoria Cell: (209) 800-0484 victoriaperry@mailinator.com	Gift Shop Manager [Main Hospital/Gift Shop]	Assigned
Pierce, Pauline paulinejperce@dodgit.com	Gift Shop Helper [Main Hospital/Gift Shop]	Assigned
Pitts, Carol Cell: (215) 606-5174 carolrpitts@dodgit.com	Gift Shop Manager [Main Hospital/Gift Shop]	Assigned
Posada, Margaret Home: (334) 359-2850 margaretposada@trashymail.com	Gift Shop Helper [Main Hospital/Gift Shop]	Substitute
Saladin, Wanda Home: (307) 939-7819 wandarsaladin@pookmail.com	Gift Shop Manager [Main Hospital/Gift Shop]	Assigned

14 volunteers listed


Printable view

Exit

Close this window | Privacy policy

You control which Status(es) or Role(s) a volunteer record must have to appear on the Volunteers tab by selecting [Setup](#) [pg:0887] from the menu, expanding the VicNet link, and selecting *Volunteers tab (for coordinators)*.

Coordinators can also view more fields from the volunteer's record, as well as update these fields if you allow. To do this, the Coordinator clicks on the name of a specific volunteer on the Volunteers tab. This will bring up a page showing the additional information for that volunteer.



**Volunteer Information Center**

---

**Coordinator information for Betty Valasquez**

Home
Mail
Volunteers
My Schedule
Account

**Michele Hamm** [Return to volunteers](#)

**Contact Information**

First name:

Last name:

Title:

Nickname:

Type: **High School**

Street 1:

Street 2:

City:

State:  Zip:

Home phone:   OK to call me here


Work phone:   OK to call me here

Cell phone:   OK to call me here

Email address:

Save

**Photo**  
Click the Upload link to upload a photo of this volunteer.



[Upload](#)

**Demographics**  
We collect the following information only to help us get a better idea of the demographic make-up of our volunteers.

Date of birth:

Age:

T-Shirt Size:

Ethnicity: **White/Caucasian**

Gender: **Female**

School:

Save

**Emergency Contact**  
The volunteer's emergency contact information.

<p><b>1</b></p> <p>First name: <input type="text" value="Sylvia"/></p> <p>Last name: <input type="text" value="Hamm"/></p> <p>Title: <input type="text" value="Choose"/></p> <p>Street 1: <input type="text" value="3425 Dancing Dove Lane"/></p> <p>Street 2: <input type="text"/></p> <p>City: <input type="text" value="Wayland"/></p> <p>State: <input type="text" value="MI"/> Zip: <input type="text" value="49348"/></p>	<p><b>2</b></p> <p>First name: <input type="text"/></p> <p>Last name: <input type="text"/></p> <p>Title: <input type="text" value="Choose"/></p> <p>Street 1: <input type="text"/></p> <p>Street 2: <input type="text"/></p> <p>City: <input type="text"/></p> <p>State: <input type="text" value="Choose"/></p> <p>Zip: <input type="text"/></p>
---	---

To enable Coordinators to do this, the *Coordinators can view volunteer records* box must be checked on the page you see after you select [Setup \[pg:0887\]](#) from the menu, expand the VicNet link, and select *Volunteers tab (for coordinators)*.

Click the

*Fields*

link to select the fields you want the Coordinators to see. If you want the Coordinators to only be able to see the information (but not change it), check the box in the *Read only* column. [Help topic 1035 \[pg:1445\]](#) may also be helpful if you want to allow Coordinators to upload or clear volunteer photos.

**My Schedule Tab for Coordinators**

Coordinators can view, print, and manage the schedules for the assignment (or assignments) they supervise on the *My Schedule* tab in VicNet. If you have enabled Coordinators to view the *My Schedule* tab, when they click on the tab they will see the month view of the schedule showing all the volunteers who are scheduled, as well as unfilled openings, for the assignment.

**Your Logo Here**

**Volunteer Information Center**

Coordinator information for **Betty Valasquez**

Home Mail Volunteers **My Schedule** Account

September 2014 Prev month Next month

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
<b>Aug 31</b>	<b>1 Labor Day</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>
<input type="checkbox"/> 9:30 a - 3:30 p Gift Shop Manager <input checked="" type="checkbox"/> 10:00 a - 3:00 p Gift Shop Helper A. Becker C (207) 620-4275 <input checked="" type="checkbox"/> 3:00 p - 8:30 p Gift Shop Manager C. Pitts C (215) 605-5174 <input checked="" type="checkbox"/> 3:00 p - 8:00 p Gift Shop Helper K. Kurt C (201) 941-4007	<input checked="" type="checkbox"/> 9:30 a - 3:30 p Gift Shop Manager J. Mauk C (216) 737-8979 <input checked="" type="checkbox"/> 10:00 a - 3:00 p Gift Shop Helper K. Gatto C (214) 865-2536 <input checked="" type="checkbox"/> 3:00 p - 8:30 p Gift Shop Manager C. Pitts C (215) 605-5174 <input checked="" type="checkbox"/> 3:00 p - 8:00 p Gift Shop Helper M. Hamm C (214) 637-0918	<input checked="" type="checkbox"/> 9:30 a - 3:30 p Gift Shop Manager J. Mauk C (216) 737-8979 <input checked="" type="checkbox"/> 10:00 a - 3:00 p Gift Shop Helper K. Gatto C (214) 865-2536 <input checked="" type="checkbox"/> 3:00 p - 8:30 p Gift Shop Manager C. Pitts C (215) 605-5174 <input checked="" type="checkbox"/> 3:00 p - 8:00 p Gift Shop Helper M. Hamm C (214) 637-0918	<input checked="" type="checkbox"/> 9:30 a - 3:30 p Gift Shop Manager J. Mauk C (216) 737-8979 <input checked="" type="checkbox"/> 10:00 a - 3:00 p Gift Shop Helper K. Gatto C (214) 865-2536 <input checked="" type="checkbox"/> 3:00 p - 8:30 p Gift Shop Manager C. Pitts C (215) 605-5174 <input checked="" type="checkbox"/> 3:00 p - 8:00 p Gift Shop Helper M. Hamm C (214) 637-0918	<input checked="" type="checkbox"/> 9:30 a - 3:30 p Gift Shop Manager W. Saladin C (212) 525-7412 <input checked="" type="checkbox"/> 10:00 a - 3:00 p Gift Shop Helper K. Gatto C (214) 865-2536 <input checked="" type="checkbox"/> 3:00 p - 8:30 p Gift Shop Manager V. Perry C (209) 800-0484 <input checked="" type="checkbox"/> 3:00 p - 8:00 p Gift Shop Helper E. McNeese C (202) 365-7728	<input checked="" type="checkbox"/> 9:30 a - 3:30 p Gift Shop Manager W. Saladin C (212) 525-7412 <input checked="" type="checkbox"/> 10:00 a - 3:00 p Gift Shop Helper K. Gatto C (214) 865-2536 <input checked="" type="checkbox"/> 3:00 p - 8:30 p Gift Shop Manager V. Perry C (209) 800-0484 <input checked="" type="checkbox"/> 3:00 p - 8:00 p Gift Shop Helper H. Knox C (214) 747-1090	<input checked="" type="checkbox"/> 9:30 a - 3:30 p Gift Shop Manager W. Saladin C (212) 525-7412 <input checked="" type="checkbox"/> 10:00 a - 3:00 p Gift Shop Helper A. Becker C (207) 620-4275 <input checked="" type="checkbox"/> 3:00 p - 8:30 p Gift Shop Manager V. Perry C (209) 800-0484 <input checked="" type="checkbox"/> 3:00 p - 8:00 p Gift Shop Helper T. Kirkland C (201) 257-7548
<b>7</b>	<b>8</b>	<b>9</b>	<b>10</b>	<b>11</b>	<b>12</b>	<b>13</b>
<input checked="" type="checkbox"/> 9:30 a - 3:30 p Gift Shop Manager J. Mauk C (216) 737-8979 <input checked="" type="checkbox"/> 10:00 a - 3:00 p Gift Shop Helper A. Becker C (207) 620-4275 <input checked="" type="checkbox"/> 3:00 p - 8:30 p Gift Shop Manager C. Pitts C (215) 605-5174 <input checked="" type="checkbox"/> 3:00 p - 8:00 p Gift Shop Helper M. Hamm C (214) 637-0918	<input checked="" type="checkbox"/> 9:30 a - 3:30 p Gift Shop Manager J. Mauk C (216) 737-8979 <input checked="" type="checkbox"/> 10:00 a - 3:00 p Gift Shop Helper K. Gatto C (214) 865-2536 <input checked="" type="checkbox"/> 3:00 p - 8:30 p Gift Shop Manager C. Pitts C (215) 605-5174 <input checked="" type="checkbox"/> 3:00 p - 8:00 p Gift Shop Helper M. Hamm C (214) 637-0918	<input checked="" type="checkbox"/> 9:30 a - 3:30 p Gift Shop Manager J. Mauk C (216) 737-8979 <input checked="" type="checkbox"/> 10:00 a - 3:00 p Gift Shop Helper K. Gatto C (214) 865-2536 <input checked="" type="checkbox"/> 3:00 p - 8:30 p Gift Shop Manager C. Pitts C (215) 605-5174 <input checked="" type="checkbox"/> 3:00 p - 8:00 p Gift Shop Helper M. Hamm C (214) 637-0918	<input checked="" type="checkbox"/> 9:30 a - 3:30 p Gift Shop Manager J. Mauk C (216) 737-8979 <input checked="" type="checkbox"/> 10:00 a - 3:00 p Gift Shop Helper K. Gatto C (214) 865-2536 <input checked="" type="checkbox"/> 3:00 p - 8:30 p Gift Shop Manager C. Pitts C (215) 605-5174 <input checked="" type="checkbox"/> 3:00 p - 8:00 p Gift Shop Helper M. Hamm C (214) 637-0918	<input checked="" type="checkbox"/> 9:30 a - 3:30 p Gift Shop Manager W. Saladin C (212) 525-7412 <input checked="" type="checkbox"/> 10:00 a - 3:00 p Gift Shop Helper K. Gatto C (214) 865-2536 <input checked="" type="checkbox"/> 3:00 p - 8:30 p Gift Shop Manager V. Perry C (209) 800-0484 <input checked="" type="checkbox"/> 3:00 p - 8:00 p Gift Shop Helper T. Kirkland C (201) 257-7548	<input checked="" type="checkbox"/> 9:30 a - 3:30 p Gift Shop Manager W. Saladin C (212) 525-7412 <input checked="" type="checkbox"/> 10:00 a - 3:00 p Gift Shop Helper K. Gatto C (214) 865-2536 <input checked="" type="checkbox"/> 3:00 p - 8:30 p Gift Shop Manager V. Perry C (209) 800-0484 <input checked="" type="checkbox"/> 3:00 p - 8:00 p Gift Shop Helper H. Knox C (214) 747-1090	<input checked="" type="checkbox"/> 9:30 a - 3:30 p Gift Shop Manager W. Saladin C (212) 525-7412 <input checked="" type="checkbox"/> 10:00 a - 3:00 p Gift Shop Helper A. Becker C (207) 620-4275 <input checked="" type="checkbox"/> 3:00 p - 8:30 p Gift Shop Manager V. Perry C (209) 800-0484 <input checked="" type="checkbox"/> 3:00 p - 8:00 p Gift Shop Helper H. Knox C (214) 747-1090

You can also allow Coordinators to manage the schedule for their assignments. They will not be able to make [new openings \[pg:0776\]](#) for assignments, or schedule volunteers for assignments where scheduling is allowed for "any times"--only [System Operators \[pg:0065\]](#) can do this. However, they can schedule volunteers to fill unfilled openings, remove volunteers from the schedule, and edit existing schedule entries. To do this, they will need to go to the daily view of the schedule for a certain date, then click the *Change* link beside the schedule entry.



## Volunteer Information Center

### Coordinator information for **Betty Valasquez**

[Home](#) [Mail](#) [Volunteers](#) [My Schedule](#) [Account](#)

### Wednesday, September 3, 2014

		From	To	Assignment	Volunteer	Reg
<input checked="" type="checkbox"/>	<a href="#">Change</a>	9:30 a	3:30 p	Gift Shop Manager	Mauk, Joy	Yes
<input checked="" type="checkbox"/>	<a href="#">Change</a>	10:00 a	3:00 p	Gift Shop Helper	Gatto, Keith	Yes
<input checked="" type="checkbox"/>	<a href="#">Change</a>	3:00 p	8:00 p	Gift Shop Helper	Becker, Anna	Yes
<input type="checkbox"/>	<a href="#">Change</a>	3:00 p	8:30 p	Gift Shop Manager	Open	

[Previous day](#)

[Next day](#)

[Calendar view](#)

[Exit](#)

[Close this window](#) | [Privacy policy](#)

This takes them to a page where they can make changes such as modify the volunteer's scheduled times, schedule a substitute for the volunteer, add a note to the schedule entry, remove the volunteer from the schedule, or set up the entry to occur on a regular pattern such as on every Wednesday.

## Volunteer Information Center

**Coordinator information for Betty Valasquez**

Home
Mail
Volunteers
My Schedule
Account

**Wednesday, September 3, 2014**

**Schedule entry**

Date: Wednesday, September 3, 2014

Assignment: Gift Shop Helper

Times: 3:00 p to 8:00 p (regularly)

Volunteer: Anna Becker

- No change
- Schedule this substitute: Becker, Anna
- Remove Anna Becker from the schedule for this date only
- Remove Anna Becker from this schedule for this date, and all days forward
- Remove Anna Becker as a regular volunteer from this schedule completely

Regular schedule:

Every	Sun	Mon	Tue	Wed	Thu	Fri	Sat
1st	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2nd	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3rd	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4th	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5th	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Alternate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Starting: January 4 2012

- Ongoing
- Ending: January 1 2020

Volunteer note:

Save
Cancel

Exit

Close this window | Privacy policy

## Controlling Access to VicNet

You control which [Status\(es\)](#) [pg:1832] volunteers must have in order to access VicNet, and whether certain [Types or Flags](#) [pg:0212] are required on their records, on the VicNet Ground Rules page. To get to this page, select [Setup](#) [pg:0887] from the menu, expand the VicNet link, and select *Ground rules*. You also control whether or not [Coordinators](#) [pg:0163] can use VicNet on this page.

As explained in the

How VicNet Works

section of this help topic, volunteers and Coordinators access VicNet through the VicNet portal for your organization. In most cases, volunteers and Coordinators log-in initially with the email address and temporary password you assign to the record, and then select a permanent password. In some cases, the volunteers select a [password on the application form](#) [pg:1665], or have a temporary password imported using the free Import Utility program.

[Help topic 2233](#) [pg:1714] explains how to set up the password reset message volunteers and Coordinators will receive. It also shows how to send the message to multiple volunteers at once. There is not a way to send reset messages to multiple Coordinators at once. You will need to do this from the Vic tab of each Coordinator's record as shown in [help topic 2234](#) [pg:1717].

## **Previewing VicNet**

If you're new to Volgistics, you might like to see what VicNet looks like for a volunteer or Coordinator. You can do this by previewing VicNet for any volunteer in your database. You must have at least one volunteer in your database to do this. If you haven't entered any volunteers yet, back-up and [enter a volunteer record \[pg:1877\]](#) first.

You can preview VicNet for a selected volunteer or Coordinator before you create a link to VicNet from your web site.

To preview VicNet from a volunteer's perspective:

1. Choose Volunteers from the menu.
2. Select a volunteer. You can choose any volunteer you'd like. You'll preview VicNet from the perspective of the volunteer you choose.
3. Click on the [Vic tab \[pg:1810\]](#) for the selected volunteer.

If the Preview button on the VIC tab appears disabled, the selected volunteer does not currently have access to VicNet. The VIC tab will tell you why. In this case, select a different volunteer (one who does have access to VicNet), or adjust the selected volunteer's record so they can access VicNet.

4. Click the **Preview** or **Mobile preview** button.

Previewing VicNet for a Coordinator follows the same basic process except you select *Coordinators* from the menu instead of *Volunteers* in step 1.

Note that previewing VicNet for a selected volunteer is also a handy way to answer questions a volunteer might have about something they see when they visit VicNet. When you preview VicNet for a selected volunteer, you'll see the same thing they do. You can learn more about previewing VicNet in [help topic 2159 \[pg:1705\]](#).

## **Why is it called 'VicNet?'**

'Vic' stands for 'Volunteer Information Center' and 'Net' is how you access it (over the Internet). Thus the name 'VicNet.'

There is also a module called *VicTouch*. [VicTouch \[pg:1778\]](#) gives volunteers a way to interact with Volgistics through onsite touch screen kiosks.



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# The VicTouch Touch Screen Monitor

Help topic 1030

Added or revised 12-26-2007

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While it is possible to use [VicTouch \[pg:1778\]](#) at a PC that does not have a touch screen monitor (volunteers would use a computer mouse to select buttons), touch screen monitors generally provide an interface that is easier to use than a mouse. Some volunteers may not be familiar with the use of a mouse, others may be accustomed to a left-handed mouse rather than one that is setup for right-handed users. If your VicTouch station(s) are located in public areas, touch screen monitors are more secure than a computer mouse. This help topic explains the basics about touch screen monitors and provides guidance for choosing a touch screen monitor to use with VicTouch.

## **Where to get a touch screen monitor**

Volgistics does not sell touch screen monitors; however, there are many touch screen monitor vendors around. If your organization has an information services department, they may already have established sources for hardware from which they can purchase a touch screen monitor. You can find touch screen monitor vendors online. If you perform a web search for 'touch screen monitors' you'll find a variety of different vendors.

## **Cost**

Touch screen monitor prices are available online at many of the touch screen monitor vendor's web sites. Prices vary depending on the type and size of monitor you choose, and whether or not the monitor has a PC built into it (your touch screen monitor must either be attached to a PC, or have a PC built-in to it).

## **Resistive touch screens versus capacitive touch screens**

Touch screen monitors come in two varieties, resistive and capacitive. You can use VicTouch with either variety, although capacitive monitors are generally recommended.

Resistive monitors respond to pressure from anything on the screen, but their surfaces are a bit less durable. Capacitive monitors respond only to the touch of an ungloved finger, but are more durable.

With a resistive monitor, you can touch the screen with just about anything: gloved or ungloved fingers, the end of a pen or pencil, the edge of a credit card, and so forth. Choose a resistive monitor only if your VIC workstation will be in a location where arriving and departing volunteers would be wearing gloves.

While capacitive monitors respond only to the touch of an ungloved finger, their surfaces are harder and better suited to the kind of un-attended, high-volume access your VicTouch station may receive.

## **Flat panel versus regular monitor**

Either will work. Flat panel monitors are good if the space for your VicTouch station is limited, and a conventional computer monitor will not fit. Flat panel monitors typically cost more than conventional CRT displays but may last longer and have a sharper image.

## Monitor size

Touch screen monitors come in a variety of screen sizes, from 14 inches to 21 inches, or more. Since VicTouch will work with any size monitor, monitor dimensions are a matter of preference and budget.

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# How to Sign-in and Sign-out at VicTouch: a Brief Guide for Volunteers

Help topic 1147

Added or revised 03-23-2017

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*This help topic is intended to help volunteers better understand how to use the VicTouch module.*

VicTouch is a touchscreen based Volunteer Information Center (abbreviated as "Vic") that allows volunteers to check-in and out upon arrival and departure from the facility where you volunteer. Your volunteer service hours are recorded automatically when you sign-in and sign-out so it is important to do this so your organization has an accurate record of your volunteer service.

## **Sign-in For Individuals**

Here are the general steps for checking in at your organization's VicTouch station. Note that many aspects of the check-in sequence are customizable, so the pictures and directions provided may vary from what you will actually see when you sign-in to serve at your organization.

### 1. Enter your volunteer PIN

Each volunteer must have a PIN before he or she can sign-in at VicTouch. How you obtain your PIN is determined by your organization. In many cases they will assign one to you; however, they might ask you to choose your own PIN. Regardless of how you obtain your PIN, it is something you will need to be able to recall in order to sign-in. If you do not know your PIN, please contact the volunteer office at the organization you volunteer with.

To start, enter your PIN by touching the appropriate number buttons on the keypad.

# Volunteer Information Center



Welcome. The Volunteer Information Center is where volunteers check-in and out. If you are ready to check-in or out, enter your PIN to get started.

If you are interested in volunteering, or you have trouble checking-in or out, please contact Linda in Volunteer Services (ext. 302).

## Enter your volunteer PIN number

Enter your volunteer ID number using the keypad buttons, and then touch the Continue button.

1	2	3	
4	5	6	Cancel
7	8	9	← Backspace
*	0	#	Continue

After entering your PIN, touch the **Continue** button.

## 2. Confirm your name

The next screen in the check-in sequence will ask you to confirm your name.

### Is this Jennifer Boston ?

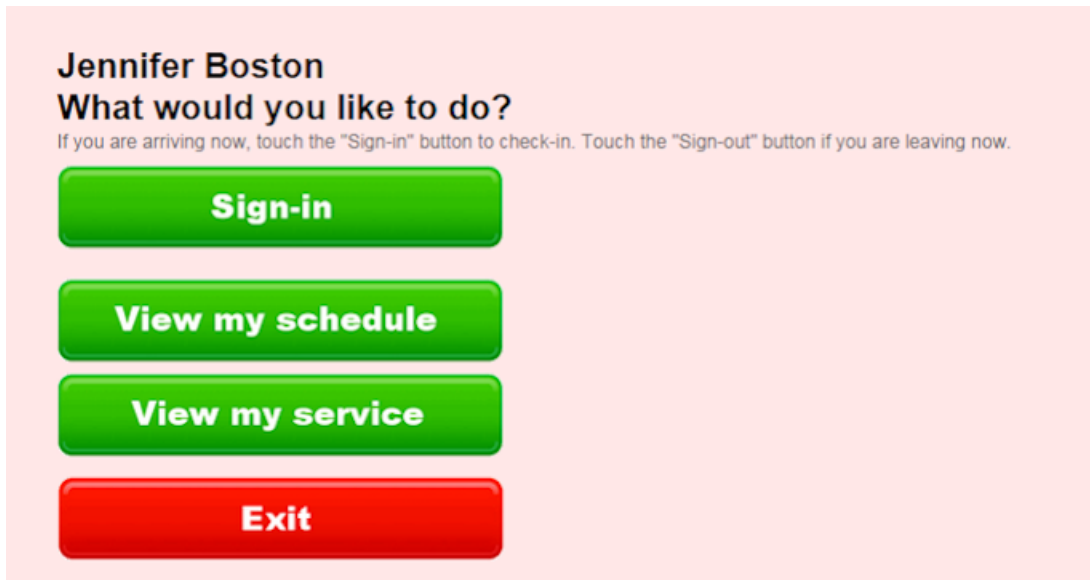
If you're not the volunteer whose name is shown, please press "No" and try to sign-in again. If you need additional help, please contact the Volunteer Services office.

Yes
No

If the screen displays the correct name, touch the **Yes** button. If the name displayed is not yours, touch the **No** button and try again.

## 3. What would you like to do?

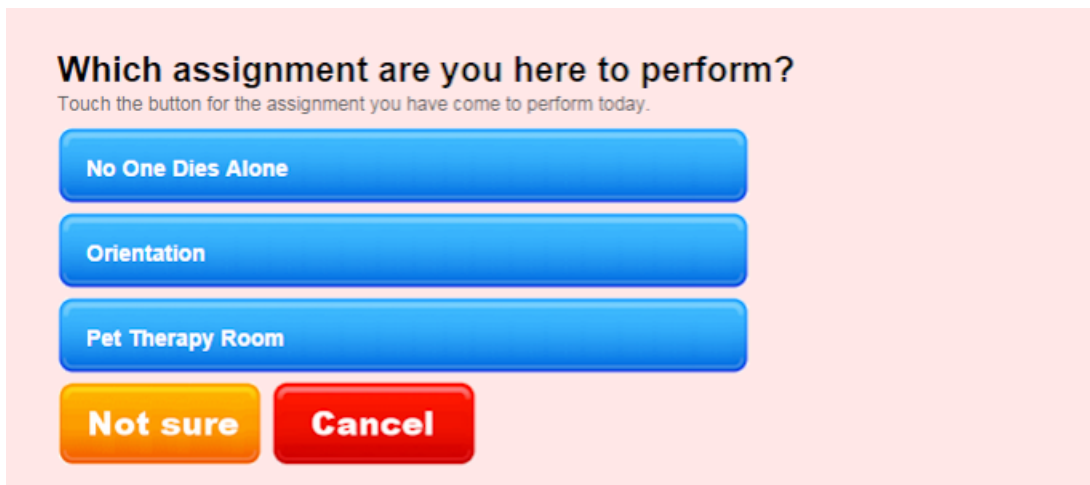
After you confirm your identity, the menu screen will appear and this allows you to choose what you'd like to do. In this case, you are signing-in to begin your shift so touch the **Sign-in** button.



If you are a group leader signing-in for a group, you will be asked how many volunteers are serving in your group. Please see the *Sign-in for Groups* section below for more information.

#### 4. Choose the Assignment you are here to perform

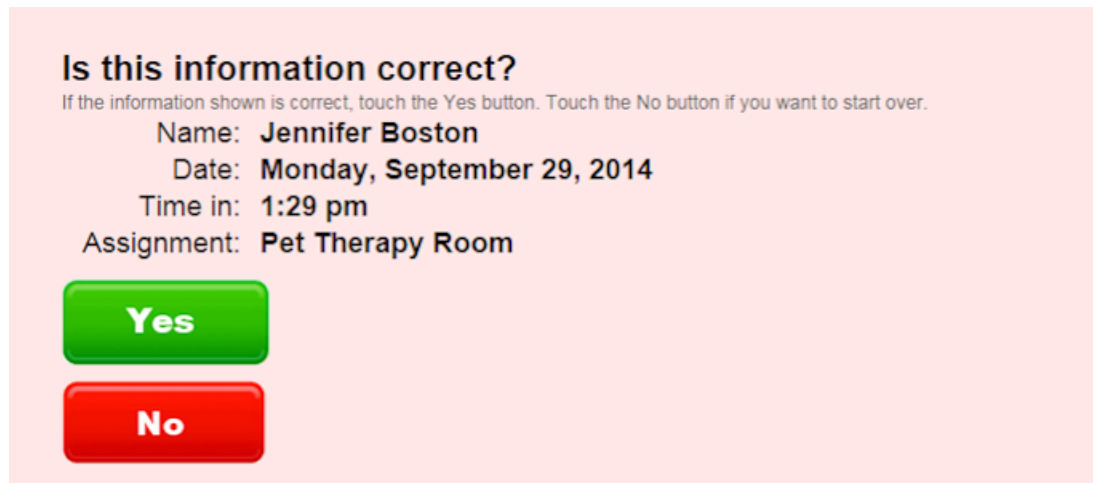
Many, but not all, organizations require volunteers to select the name of the Assignment they are working in as part of the sign-in process. Assignments are usually the job, or task, you will perform as a volunteer. Assignments may also be the name of an event or a department.



If you see this screen, touch the name of the Assignment you are there to perform. Some organizations also include a **Not sure** button that you can select if you're unsure of your Assignment.

## 5. Confirm the sign-in information

As long as you did not select the **Cancel** button, the next screen will ask you to confirm that the information shown is correct. This is important because the name, date, time and Assignment name indicated on this screen will be used to track your service.



**Is this information correct?**  
If the information shown is correct, touch the Yes button. Touch the No button if you want to start over.

Name: **Jennifer Boston**  
Date: **Monday, September 29, 2014**  
Time in: **1:29 pm**  
Assignment: **Pet Therapy Room**

**Yes**

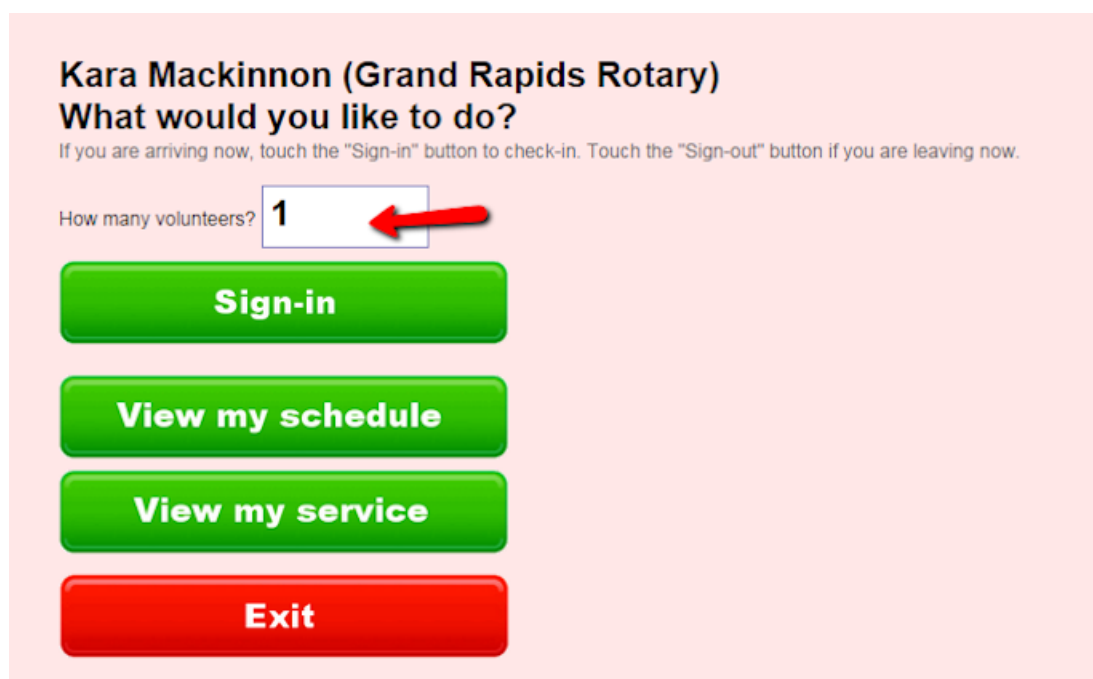
**No**

If the screen displays the correct information, touch the **Yes** button. If the information displayed is not accurate, touch the **No** button and try again.

Once you confirm your selections, you are officially signed in.

## **Sign-in For Groups**

If you are a group leader, the sign-in process will follow the same steps as the sign-in for individuals. The difference is that after you enter your PIN and confirm your identity, you will see a field asking how many volunteers are serving in your group.



**Kara Mackinnon (Grand Rapids Rotary)**  
**What would you like to do?**  
If you are arriving now, touch the "Sign-in" button to check-in. Touch the "Sign-out" button if you are leaving now.

How many volunteers?  ←

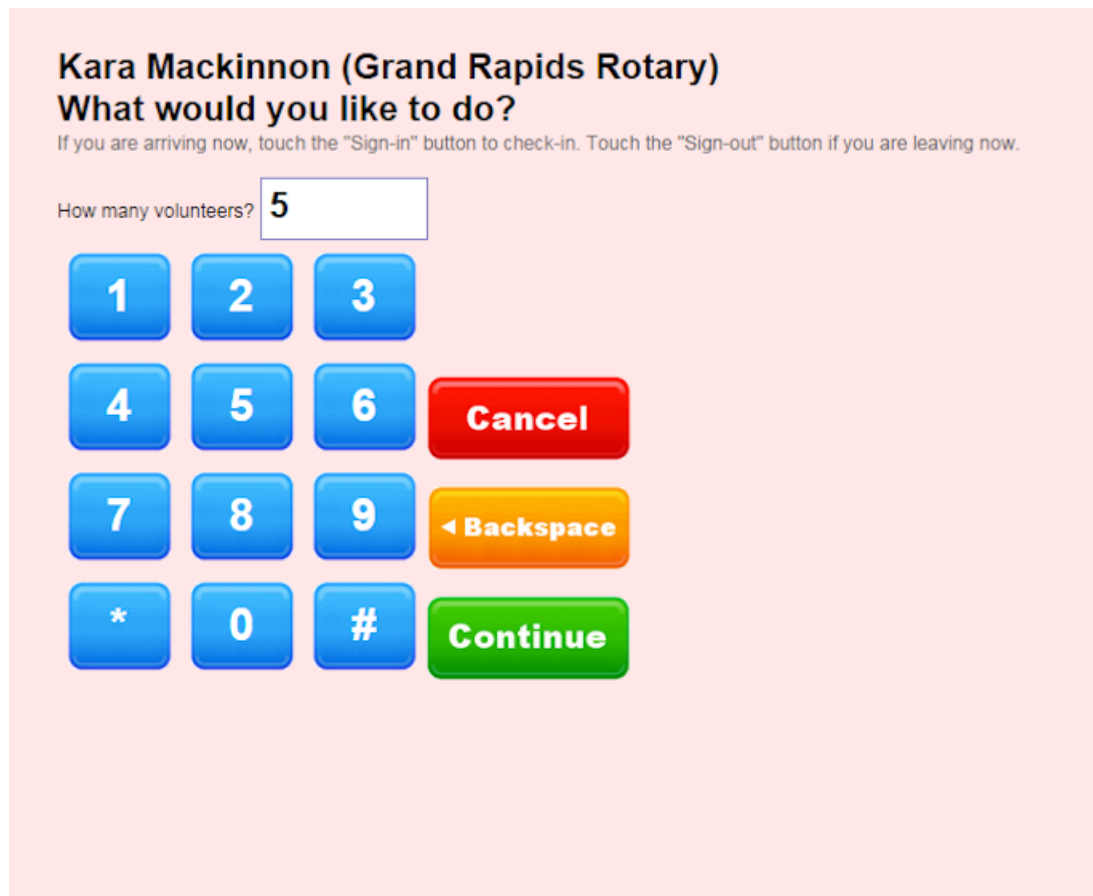
**Sign-in**

**View my schedule**

**View my service**

**Exit**

If the number listed is not correct, touch the *How many volunteers?* field and then use the keypad to enter the number of volunteers in your group today.



Press the **Continue** button when the correct number has been entered, and then continue the sign-in process outlined in the *Sign-in for Individuals* section above.

## Sign-Out

When you have completed your volunteer service, you will need to return to the VicTouch station to sign-out. The system needs both a sign-in and sign-out time to accurately record your hours so remembering to sign-out is very important.

The process for signing out of VicTouch is basically the same as signing in. Enter your PIN, touch the **Continue** button, and confirm your identity. Touch the **Sign-out** button on the menu screen so the system records when you finished serving.

If you are switching Assignments instead of signing-out completely, touch the **Switch assignments** button, and then choose the name of the Assignment you will be performing next.

**Jennifer Boston**  
**What would you like to do?**

If you are arriving now, touch the "Sign-in" button to check-in. Touch the "Sign-out" button if you are leaving now.

**Sign-out**

**Switch assignments**

**View my schedule**

**View my service**

**Exit**



The system will sign you out from the first Assignment and sign you in for the next. After you finish serving for the day, you will still need to sign-out for the Assignment you switched to. *Please note that organizations can choose whether or not the **Switch assignments** button shows so you may not see this option.*

### **Messages and Greeting Cards**

When you sign-in or sign-out, you may see a message from your organization. The message will only appear once and there is not a way to see it again after the first time you view it.

## Mail for Jennifer Boston



Message  
Date: Monday, September 29, 2014  
Subject: New Parking Pass

Hi Jennifer,

Please stop by the volunteer office (room 3029) before you leave today.  
Your new parking pass is ready for you to pick-up.

Thanks,  
Linda Sherman  
Volunteer Services Manager

Touch the Continue button when you have finished reading a mail message.

**Continue**

Your organization may also use VicTouch to send you a card on a special occasion such as your birthday, service anniversary date, or a holiday. You may see cards just once, or for a number of days, depending on your organization's settings for this.

Greetings!



The Volunteer Department wishes all our volunteers a prosperous and happy New Year!

We know your time with family and friends is valuable, so we wish you a special thank you for your volunteer service during this busy holiday season!

Thank you,  
Arnold Cabrera  
Volunteer Services

Touch the Continue button when you have finished reading a mail message.

**Continue**



When you are done viewing the message or card, touch the **Continue** button to go to the next screen. If for some reason you do not see the **Continue** button, don't panic. The system will advance to the next screen after about a minute of inactivity.

## Viewing Schedule and Self-Scheduling

Your organization may have setup their account to allow you to view your schedule and/or self-schedule for new dates. If they allow this, you will see a **View my schedule** button after you enter your PIN and confirm your identify. The current month's schedule will show by default. You can move to the next or the previous month by touching the appropriate button at the top of the screen.

You may also see an **Email me a copy** and/or **Text me a copy** button if your organization has set this up and you have opted to have schedule reminders sent to you. If you touch these buttons, the system will send you a message with the days you are scheduled for in the month you are viewing.

If your organization has setup self-scheduling, you will see a *Help wanted* icon on the calendar on any dates where there are open Assignments you can schedule yourself for.

**Schedule for Jennifer Boston**  
Touch any date to see the schedule for that day.

Calendar navigation: **Sep 2014** | **Nov 2014** | **Email me a copy** | **Finished**

We need volunteers on days that have the Help wanted symbol. Touch any of these days to learn more or to sign-up.

**HELP WANTED**

**October 2014**

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
			1	2	3 <b>HELP WANTED</b>	4 9:30 a to 11:30 a Pet Therapy Room
5 9:30 a to 11:30 a Pet Therapy Room	6 <b>HELP WANTED</b>	7 <b>HELP WANTED</b>	8	9	10 <b>HELP WANTED</b>	11 9:30 a to 11:30 a Pet Therapy Room
12 9:30 a to 11:30 a Pet Therapy Room	13	14	15 <b>HELP WANTED</b>	16	17 <b>HELP WANTED</b>	18 <b>HELP WANTED</b> 9:30 a to 11:30 a Pet Therapy Room
19 <b>HELP WANTED</b> 9:30 a to 11:30 a Pet Therapy Room	20 <b>HELP WANTED</b>	21	22	23	24 <b>HELP WANTED</b>	25 <b>HELP WANTED</b> 9:30 a to 11:30 a Pet Therapy Room
26 9:30 a to 11:30 a Pet Therapy Room	27	28 <b>HELP WANTED</b>	29 <b>HELP WANTED</b>	30 <b>HELP WANTED</b>	31	

Touch a date where the *Help wanted* icon appears to see open assignments and shifts for that date. If you'd like to schedule yourself for a shift, touch the **Schedule me** button beside an opening.

**Schedule for Monday, October 20, 2014**

**Return to calendar** **Finished**

**Openings & scheduled volunteers:**

---

**Pet Therapy Room**

---

2:00 p to 4:00 p      Would you like to serve on this date? Click the Schedule-Me button to schedule yourself here  
1 volunteer still needed

**Schedule me**

---

7:00 p to 9:00 p      Flores, Iva

---

Once you are scheduled, you can also remove yourself from a shift if you cannot make it. To do this, touch the date you're scheduled and then the **Remove me** button.

**Schedule for Monday, October 20, 2014**

**Return to calendar** **Finished**

**Your schedule for this date:**

---

2:00 p to 4:00 p  
Pet Therapy Room [Main Hospital/Rehabilitation]  
Can't serve on this date? Touch the Remove Me button to remove yourself from these times

**Remove me**

---

**Openings & scheduled volunteers:**

---

**Pet Therapy Room**

---

2:00 p to 4:00 p      Boston, Jennifer

---

7:00 p to 9:00 p      Flores, Iva

---

If you do not see a **Remove me** button, it means that your organization does not allow volunteers to remove themselves from shifts, or that it is too close to the date the shift is scheduled to remove yourself. In either case, you will need to contact the organization you volunteer with to let them know you cannot serve the shift you are scheduled for.

When you are done using the schedule page, click the **Finished** button to return to the main menu. *If you are already signed-in but have not served yet, be sure to touch the **Exit** button on the menu page to return the system to the keypad screen. If you have not served but are signed-in, touching the **Sign-out** button will make it so your hours are not accurately recorded!*

### Viewing Service History

Your organization may allow you to use VicTouch to view information about your volunteer service such as the hours you served in a certain year, your start date, your lifetime service hours, and totals for other service measures they record. If they have set this up, you will see a **View my service** button after you enter your PIN and confirm your identity. The first screen you see will show your service totals collapsed by year.

## Service history for Jennifer Boston



Totals  
 Start date: October 25, 2012  
 Year-to-date hours: 146:09  
 Life hours: 384:39

### Service by year

Year	Hours	Merit Hours	Absences
2014	146:09	273:54	0
2013	206:00	206:00	0
2012	32:30	32:30	0
Life total	384:39	512:24	0

View details for year

View details for year

View details for year

Finished

You can touch the **View details for year** button to see the details for a certain year.

## Service history for Jennifer Boston

Totals  
 Start date: October 25, 2012  
 Year-to-date hours: 146:09  
 Life hours: 384:39

### 2012 Service

Date	Assignment	Times	For	Hours	Merit Hours	Absences
12-30-2012	Pet Therapy Room	9:30 a to 11:30 a		2:00	2:00	0
12-29-2012	Pet Therapy Room	9:30 a to 11:30 a		2:00	2:00	0
12-23-2012	Pet Therapy Room	9:30 a to 11:30 a		2:00	2:00	0
12-22-2012	Pet Therapy Room	9:30 a to 11:30 a		2:00	2:00	0
12-16-2012	Pet Therapy Room	9:30 a to 11:30 a		2:00	2:00	0
12-15-2012	Pet Therapy Room	9:30 a to 11:30 a		2:00	2:00	0
12-09-2012	Pet Therapy Room	9:30 a to 11:30 a		2:00	2:00	0
12-08-2012	Pet Therapy Room	9:30 a to 11:30 a		2:00	2:00	0
12-02-2012	Pet Therapy Room	9:30 a to 11:30 a		2:00	2:00	0
12-01-2012	Pet Therapy Room	9:30 a to 11:30 a		2:00	2:00	0
11-25-2012	Pet Therapy Room	9:30 a to 11:30 a		2:00	2:00	0
11-24-2012	Pet Therapy Room	9:30 a to 11:30 a		2:00	2:00	0
11-18-2012	Pet Therapy Room	9:30 a to 11:30 a		2:00	2:00	0
11-17-2012	Pet Therapy Room	9:30 a to 11:30 a		2:00	2:00	0
11-11-2012	Pet Therapy Room	9:30 a to 11:30 a		2:00	2:00	0
10-09-2012	Orientation	7:00 a to 9:30 a		2:30	2:30	0
2012 total				32:30	32:30	0

Finished

View service for all years

When you are done viewing your service information, click the **Finished** button to return to the main menu. *If you are already signed-in but have not served yet, be sure to touch the **Exit** button on the menu page to return the system to the keypad screen. If you have not served but are signed-in, touching the **Sign-out** button will make it so your hours are not accurately recorded!*

---

## Does VicTouch count as a system operator?

Help topic 1161

Added or revised 2-14-2008

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No, using VicTouch will *not* impact the number of system operators available in an account. While you must enter an existing system operator's credentials to start VicTouch, this process does not log that system operator into Volgistics; it simply confirms that the user is authorized to start VicTouch. Therefore, that system operator is not prevented from using Volgistics at other computers while VicTouch is running. Note that organizations can run VicTouch at as many different computer stations as they would like.

### Related help

[Help Topic 2205 \[pg:0065\]](#) - System Operator

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## Getting Started with VicTouch

Help topic 1184

Added or revised 03-02-2017

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[VicTouch \[pg:1778\]](#) is an optional module that can be used in conjunction with Volgistics to allow volunteers to interact with the system to track service, receive messages, and manage schedules at VicTouch workstations at your volunteer office or service site.

The Volgistics system itself provides powerful volunteer tracking capabilities with or without use of the optional VicTouch (and [VicNet \[pg:1724\]](#)) modules. It is up to an organization to determine whether VicTouch will be useful for their specific purposes. For example, organizations where volunteers serve in a central location would have reason to implement VicTouch, whereas VicTouch may not lend itself to organizations where volunteer service is performed off-site or at various locations because it would not be feasible for volunteers to check-in and out at centrally located Internet-connected workstations.

If an organization decides that VicTouch is something they would like to utilize, [Administrators \[pg:0052\]](#) have significant control over how - and by whom - the module is used.

### Setting up VicTouch

#### **Step 1. Choose which volunteers should be allowed to use VicTouch**

It often makes sense for only certain volunteers to be able to use VicTouch. For example, perhaps volunteers with the [Active Status \[pg:1832\]](#) should be able to use VicTouch, but volunteers with the *Inactive* Status should not. Administrators can customize the Status(es) volunteers must have in order to use VicTouch on the [VicTouch Ground Rules \[pg:1511\]](#) page.

#### **Step 2. Choose which Assignment buttons should appear when a volunteer checks in**

When a volunteer goes to check-in for service at the VicTouch station, they can optionally be required to choose the [Assignment \[pg:0096\]](#) they are there to perform. The VicTouch Check-in Sequence [Assignment Selection Screen setup page \[pg:1515\]](#) is where an Administrator decides whether or not volunteers should indicate their Assignment when they sign-in at VicTouch.

Once the checkbox stating that volunteers should indicate their Assignment at VicTouch is marked, Administrators can choose which Assignment buttons are displayed as possible choices for the volunteer. For example, all active Assignments, or the volunteer's Assignments when the volunteer has a particular [Role \[pg:0103\]](#), or one of several Roles, in the Assignment.

In addition to any Assignments selected on this page, buttons will also always appear for any Assignment with the "Sign-in option" [\[pg:1761\]](#) box checked on the Assignment record.

### Step 3. Enable message delivery at VicTouch

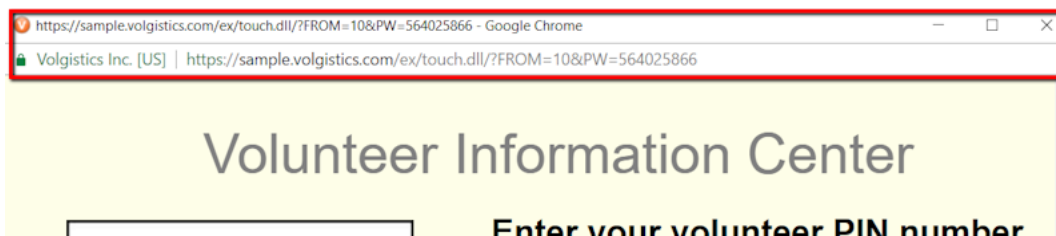
Organizations can send [Vic mail \[pg:0315\]](#) messages so volunteers see the message when they sign-in or sign-out at the VicTouch station. The Administrator should make sure this feature is enabled on the [VicTouch Mail Screen setup page \[pg:1510\]](#) in order to be able to do this.

### Step 4. Optionally setup Greeting Cards

You can setup the system to automatically display a message to the volunteer when they sign-in around their birthday or service anniversary. Messages can also be setup to offer holiday greetings. There are spots for two holidays, but you can update the messages throughout the year if you want to note more than two holidays. You can find directions on how to setup this feature in [help topic 2326 \[pg:1776\]](#).

### Step 5. Setup the VicTouch station

For the most safe and secure VicTouch experience, you must launch the module in kiosk mode. Kiosk mode basically causes the module's display to fill the entire monitor screen, and it eliminates the web browser controls and URL address.



The reason this is important is it prevents volunteers (or others) from shutting down the module, navigating to other web sites, or copying your account's VicTouch URL address. The last reason is particularly important because if people copy the URL address they could start VicTouch anywhere--and then sign-in and out as if they were at your facility.

Traditionally, VicTouch is designed to be used on a desktop computer running the Microsoft Windows operating system. The computer should be dedicated to just being used for VicTouch, and should have a [touchscreen monitor \[pg:1744\]](#) attached for user input (the keyboard and mouse controls are removed). If you go with the traditional route, the computer you use does not need to be the latest greatest model in terms of things such as processing speed, memory, graphics, etc. because the computer will only be performing one task. The main thing it needs are a reliable and secure Internet connection, and a supported operating system (Windows 7 or 10 at this point).

If you go with the traditional route, you can find information on how to setup the computer in [help topic 8271 \[pg:1527\]](#). If your IT department is setting up the computer for you, they will need to contact you for information from your account in some of the steps.

With the growing popularity of mobile devices such as tablets, we have seen a movement toward using these devices as sign-in stations instead of the traditional desktop computer with a touchscreen. This is perfectly acceptable, but there is not a built-in way to launch VicTouch in kiosk mode in most cases. This means you could have security risks to consider.

Apple tablets have a feature called Guided Access that can be used to emulate kiosk mode to give a safe and reliable experience. You can learn how to use this in [help topic 8269 \[pg:1792\]](#).

To our knowledge, Android tablets do not have a similar feature, but you can purchase apps to launch the web browser (and VicTouch) in kiosk mode. Be sure to get an app that allows you to hide the website address if you are concerned about this being exposed to users. You can learn how to start VicTouch from the tablet's web browser in [help topic 1203 \[pg:1933\]](#), but it will be up to you to follow the instructions from the app's producers to enable kiosk mode.

**Please note:**

Having multiple VicTouch stations is completely acceptable. The cost to use VicTouch that is part of your account's [service level \[pg:0719\]](#) is the same whether you have one station or one hundred. No additional licensing is required to add additional sign-in stations. If an organization wants to use more than one workstation for VicTouch, they should just follow the setup procedures for each VicTouch station.

**Special Circumstances**

The guidelines for setting up the VicTouch stations outlined above are the recommendations for giving the most secure and reliable experience for situations where the station is unattended. Organizations are free to modify their usage based on their circumstances. For example, using a computer with a mouse instead of a touchscreen monitor, or not launching in kiosk mode if someone will be monitoring the station. It is up to you to assess your organization's needs and decide if the risks of using VicTouch like this are acceptable.

**How Volunteers Use VicTouch**

Once you have your account configured and the VicTouch stations setup, volunteers can start using VicTouch as a time clock to record their hours. In order to use the time clock function, volunteers must sign in to VicTouch with their [volunteer PIN \[pg:1856\]](#). Each volunteer's PIN is unique and can be found in the Number field on the [Core tab \[pg:1868\]](#) of the volunteer's record. PINs are assigned by Volgistics each time a new volunteer record is added to the system. You can control how the system selects the number as shown in [help topic 2247 \[pg:1015\]](#).

If a volunteer has a hard time remembering his number, you can go to the Core tab of the volunteer's record and change the number to be something different. If the number you select is already in use, you will be prompted to select a different number.

**Bailey, George**

The screenshot shows a user interface for a volunteer record. At the top, there are tabs for Core, Profile, Service, Schedule, History, Contacts, Notes, Vic, and Docs. Below the tabs are buttons for Save, Cancel, Archive, Delete, Combine, New, Previous, and Next. There is also a 'Tagged' checkbox and a 'Copy' icon. The main form area is titled 'Name' and contains several fields: Last name: Bailey, First name: George, Middle name: (empty), Title: (dropdown), Number: 1946, Status: Active (dropdown), and Type: Adult (dropdown). A red arrow points to the Number field.

One option to let the volunteers know their PIN is to send them an email message that contains the PIN. For example, you can send a message letting volunteers know they will need to sign-in at the VicTouch station and place the code

**[[number]]**

in the body of the message where you want the PIN to appear. The system will replace the code with each recipient's PIN. You can find more information on using email codes in messages in [help topic 2103 \[pg:0386\]](#).

You may also want to include a link to [help topic 1147 \[pg:1745\]](#) in your email message because it shows volunteers how to use VicTouch. If you want to link to the written help topic, use this URL address:  
<https://www.volgistics.com/ex/Help.dll?ACT=21&HID=&TOPIC=1147>

If you want to link to the video tutorial for the help topic, use this URL address:  
<https://www.volgistics.com/Videos/HT1147.htm>

Another option to get volunteers started is to hold an orientation or training. If you do this, the video tutorial mentioned above is a great resource to show at the training.

Some organizations also like to print a [Volunteer List report \[pg:0692\]](#) containing volunteer names and PINs. This list would be a convenient reference to have on-hand when telling volunteers what their PIN is. Each organization may have different needs regarding whether or not PINs should be private. If there is not a need for privacy, the list could be left by the sign-in station. If more privacy is required, the list could be left with a person stationed by the sign-in station.

To create such a list:

1. Choose Print from the menu.
2. Click on Volunteer list.
3. Click on the *Create a new volunteer list report* link.
4. On the Options tab, select how you would like the report to be sorted.
5. On the Fields tab, select the name field(s) that should be displayed on the report and check the box next to *Number*.
6. You can give the report a title and set the formatting for PDF reports on the *Page Design* tab.
7. On the Include tab, choose the format you want for the report. You can optionally select to include just certain volunteers on the report such as those with the Active [Status \[pg:1832\]](#).
8. On the Save tab, give the report a new name so you can find it to run again when new volunteers are added. When you're ready, click the **Save and Print** button.
9. When the Include tab appears again, click the **Start printing** button.

## **How VicTouch is Helpful for Volgistics System Operators**

VicTouch's time clock feature automatically creates a service entry on the volunteer's [Service tab \[pg:1581\]](#) once a volunteer has checked out. As long as a volunteer was required to touch an Assignment button as part of the check-in process, their hours will be associated with that Assignment. Once the hours are recorded, the service information is available to include in reports such as the [Service Detail \[pg:0560\]](#) or [Service Summary \[pg:0580\]](#) reports.

VicTouch is also connected to the [Who's Here \[pg:1772\]](#) feature, which allows System Operators to see which volunteers are currently checked-in, were previously checked-in, and are scheduled to serve on the current date. It also optionally shows the current date's unfilled [schedule openings \[pg:0776\]](#). If a volunteer forgot to sign-in when they arrived, but signs-in before they leave, a System Operator can adjust the volunteer's arrival time from the Who's Here page so that the volunteer's time is recorded correctly when they sign-out.

Administrators can control what happens if volunteers forget to sign-out at the bottom of the [VicTouch Ground Rules \[pg:1511\]](#) page. They can select to have the entry [audited \[pg:1415\]](#), how many hours must pass before the automatic sign-out occurs, and how many hours are given for the entry when an automatic sign-out takes place.

System Operators can also see who was here on a certain date in the past by using the [Volunteer service details \(stock\) \[pg:0612\]](#) report located under the *Service Detail* reports. When you run the report, just select *These* days and select the specific date you want the report to cover from the dropdown lists.

### Related help

[Help Topic 1030 \[pg:1744\]](#) - The VicTouch Touch Screen Monitor

[Help Topic 1072 \[pg:1408\]](#) - Auditing Vic Service Entries

[Help Topic 1147 \[pg:1745\]](#) - How to Sign-in and Sign-Out at VicTouch: A Brief Guide for Volunteers

[Help Topic 1161 \[pg:1755\]](#) - Does VicTouch count as a system operator?

[Help Topic 1176 \[pg:1507\]](#) - VicTouch PIN Screen Setup Page

[Help Topic 1203 \[pg:1933\]](#) - Starting VicTouch

[Help Topic 1212 \[pg:1759\]](#) - Using VicTouch for Groups

[Help Topic 2152 \[pg:1856\]](#) - Using Volunteer Numbers

[Help Topic 2166 \[pg:0731\]](#) - How do I change the service level on my account?

[Help Topic 2214 \[pg:1511\]](#) - VicTouch Ground Rules

[Help Topic 2224 \[pg:1515\]](#) - Assignment Selection Screen Setup

[Help Topic 2225 \[pg:1761\]](#) - Why do volunteers always see a button for a certain assignment at VicTouch?

[Help Topic 2226 \[pg:1519\]](#) - How do I control which assignments a volunteer can choose when they sign-in at VicTouch?

[Help Topic 2283 \[pg:1762\]](#) - Shutting Down VicTouch

[Help Topic 2289 \[pg:1765\]](#) - VicTouch desktop shortcuts

[Help Topic 2307 \[pg:1772\]](#) - Who's Here

[Help Topic 2326 \[pg:1776\]](#) - Greeting Cards

[Help Topic 3021 \[pg:1778\]](#) - VicTouch

[Help Topic 8269 \[pg:1792\]](#) - Using Apple's Guided Access for VicTouch

[Help Topic 8270 \[pg:1523\]](#) - Setting-Up Internet Explorer for VicTouch

[Help Topic 8271 \[pg:1527\]](#) - Setup a VicTouch Computer

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## Using VicTouch for groups

Help topic 1212

Added or revised 05-13-2016

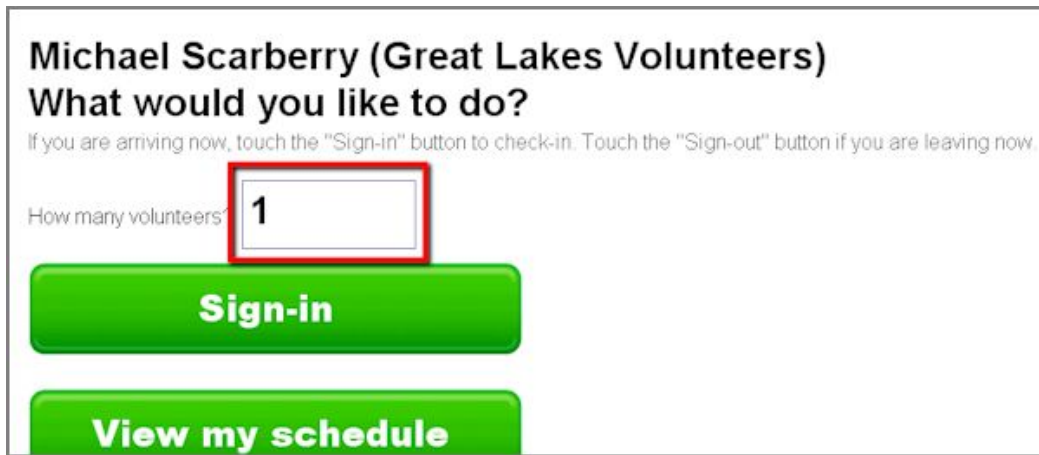
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If you use [VicTouch \[pg:1778\]](#) and you track [volunteer groups \[pg:1909\]](#) in Volgistics, group contacts can sign-in to VicTouch when their group serves. If you would like to allow groups to sign-in to VicTouch, you should make sure this feature is enabled. [Help topic 1211 \[pg:1508\]](#) explains how to do this.

Group leaders will enter the PIN from the group record to sign in to VicTouch. The PIN can be found on the [Vic tab \[pg:1810\]](#) of the group's record. Because you do not track the individual group members when you use group records, we recommend only giving the PIN to the group's leader (or a few selected individuals). This is because only one person will be able to sign-in to VicTouch for the group.

When you allow groups to enter the number of volunteers who serve, the sign-in process will work similar to the process for individuals until they get to the menu screen where volunteers select what action they would like to perform. At this point, the groups will see a an extra field where they can enter the number of volunteers serving:

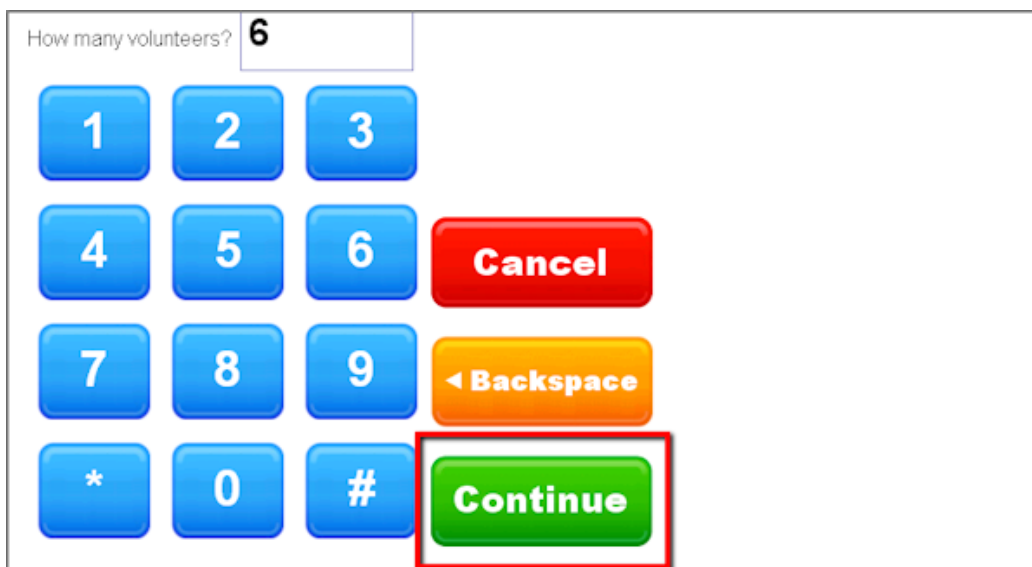




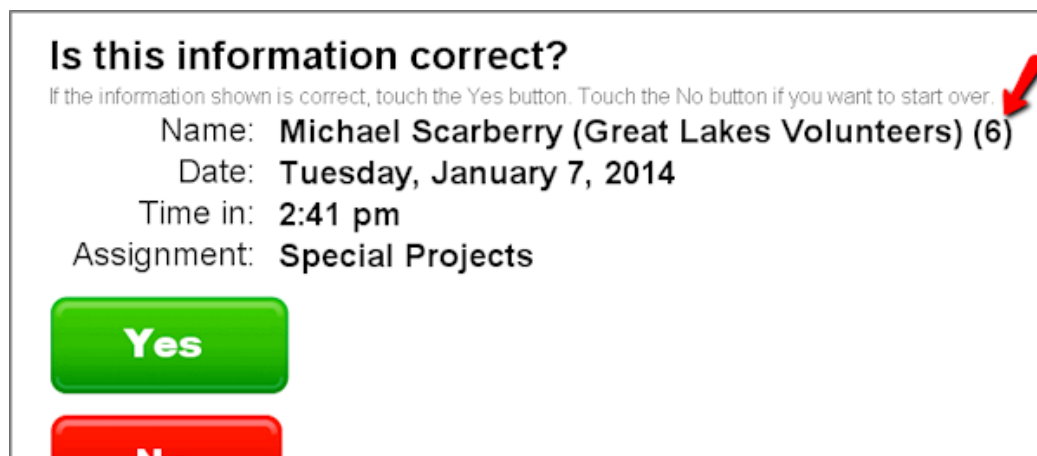
This field will default to whatever is recorded as the default value for the Volunteers field used for service entries on group records. If no default value is entered, it will default to one (1). To setup a default value for the Volunteers field:

1. Select [Setup \[pg:0887\]](#) from the [menu \[pg:0215\]](#).
2. Expand the *Field options* link.
3. Select *Service tab*.
4. Select *Volunteers*.
5. Enter a number in the *Default entry* field.
6. Click the **Save** button.

If the group leader needs to enter a different value for the number of volunteers serving, they should touch the field shown above and then use the keypad to enter the number of volunteers. After they are done, they will need to touch the **Continue** button.



They can then touch the **Sign-in** button to continue the sign-in process. When they get to the confirmation screen, the number of volunteers entered will appear in parentheses behind the leader and group names.



**Is this information correct?**  
If the information shown is correct, touch the Yes button. Touch the No button if you want to start over.

Name: **Michael Scarberry (Great Lakes Volunteers) (6)**  
Date: **Tuesday, January 7, 2014**  
Time in: **2:41 pm**  
Assignment: **Special Projects**

**Yes**  
**No**

If volunteers arrive (or depart) while the group is serving and the group is still signed-in to VicTouch, the number of volunteers can be updated in two different ways. A [System Operator \[pg:0065\]](#) can go to the [Who's Here \[pg:1772\]](#) page to edit the number of volunteers. Or, the group leader can enter their PIN at VicTouch, confirm their identity, and then touch the *Change number of volunteers?* field. After they use the keypad to enter the updated number of volunteers, they will need to click the **Continue** button to save the change.

When the group is done serving, they will enter their PIN and then touch the **Sign-out** button to complete the service entry.

#### **Related help**

[Help Topic 1147 \[pg:1745\]](#) - How to Sign-in and Sign-out at VicTouch: A Brief Guide for Volunteers

[Help Topic 1184 \[pg:1755\]](#) - Getting Started with VicTouch

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## **Why do volunteers always see a button for a certain assignment at VicTouch?**

Help topic 2225

Added or revised 10-04-2016

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You can optionally make assignment buttons appear for selected assignments that all volunteers will see when they sign-in at VicTouch, even if these assignments do not appear on their [Service tab \[pg:0138\]](#).

To make an assignment button appear at VicTouch for all volunteers:

1. Choose Assignments from the [menu \[pg:0215\]](#).
2. Select the Assignment you want to appear as an assignment option for all volunteers.
3. On the Assignment tab, check the *Sign-in option* checkbox.

Assignment   Coordinators   Profile   Description   Volunteers   Schedule   Rules

Save   Cancel   Combine, move or delete

**Name**

Site: Main Hospital  
Place: Info Desk

Assignment: North Lobby Desk

Cluster: i Information & Reception Desks ▾

Status: Active ▾ i  Advertise i  Sign-in option i  Schedule reminders i

4. Click the **Save** button.

To stop an assignment button from appearing at VicTouch for all volunteers:

1. Choose Assignments from the [menu \[pg:0215\]](#).
2. Select the Assignment for which you want to stop a button from appearing at VicTouch.
3. On the Assignment tab, un-check the "Sign-in option" checkbox.
4. Click the **Save** button.

Note that volunteers may continue to see a button for this assignment **if** they have a [Role \[pg:0103\]](#) in the assignment and you select to have assignments with that Role display on the [assignment selection screen \[pg:1515\]](#) setup page.

## Related help

# Shutting Down VicTouch

Help topic 2283

Added or revised 04-13-2015

By design there is not an obvious way to stop the [VicTouch module \[pg:1778\]](#), such as a **Close** or **Cancel** button. And if you operate VicTouch in [kiosk mode \[pg:1765\]](#) as recommended, you will not see the usual web browser controls for closing the browser. This is by design because it prevents people from exiting VicTouch without authorization (normally, you'll want to leave VicTouch running all the time). If you want to stop VicTouch from running on a VicTouch workstation, you enter a special exit code that will shut down the system.

To shut down VicTouch:

1. Use the same buttons volunteers use to enter their PIN to enter the VicTouch exit code. By default, the exit code is the pound or number sign (#) followed by 99.

# Enter your volunteer PIN number

Enter your volunteer ID number using the keypad buttons, and then touch the Continue button.

<input type="button" value="1"/>	<input type="button" value="2"/>	<input type="button" value="3"/>	
<input type="button" value="4"/>	<input type="button" value="5"/>	<input type="button" value="6"/>	<input type="button" value="Cancel"/>
<input type="button" value="7"/>	<input type="button" value="8"/>	<input type="button" value="9"/>	<input type="button" value="← Backspace"/>
<input type="button" value="*"/>	<input type="button" value="0"/>	<input type="button" value="#"/>	<input type="button" value="Continue"/>

Please note that this code can be updated for security purposes. To do this, select [Setup \[pg:0887\]](#) from the menu, expand the *VicTouch* link, select *Ground rules*, and go to the *Exit code* field.

2. Touch the **Continue** button after you enter your VicTouch exit code.

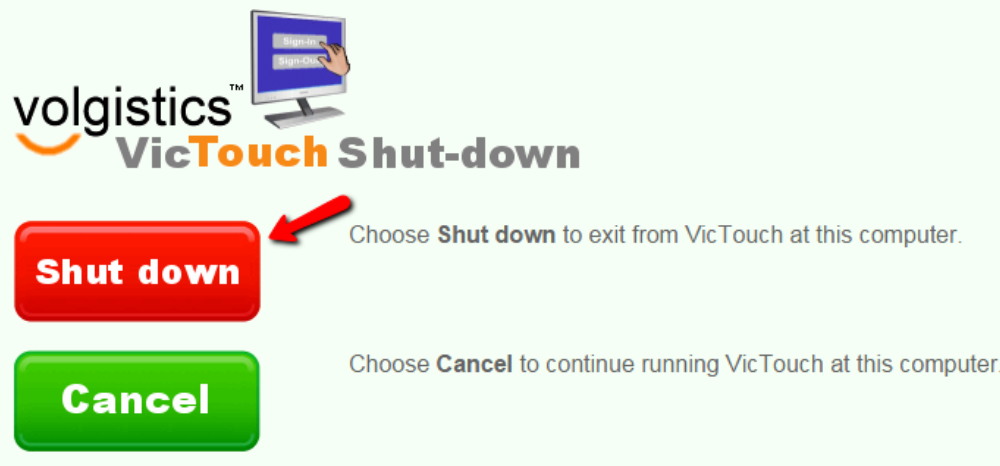
# Enter your volunteer PIN number

Enter your volunteer ID number using the keypad buttons, and then touch the Continue button.

#99



3. On the VicTouch Shut-down page, touch the **Shut down** button to stop VicTouch at this computer, or touch the **Cancel** button to continue running VicTouch.



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## VicTouch desktop shortcuts

Help topic 2289

Added or revised 12-16-2016

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You may want to setup your [VicTouch \[pg:1778\]](#) computer (or computers) so the VicTouch module can be started without anyone having to enter Volgistics login credentials. You can do this by creating desktop shortcut(s) that contain the full URL for your account's specific VicTouch portal.

This kind of desktop shortcut is useful if you want to add VicTouch to the computer's Windows *Startup* folder so VicTouch will start automatically anytime the computer is restarted, ready for volunteer interaction.

To provide a secure work station, VicTouch must be used in kiosk mode. Kiosk mode makes VicTouch fill the entire computer monitor and removes the usual browser controls – including the menu and tool bars – from view. Currently only Windows Internet Explorer 11 and Google Chrome web browsers come with the option to launch a web page in kiosk mode already available. For this reason VicTouch is only supported for Internet Explorer Version 11 and Google Chrome.

Internet Explorer is available free from Microsoft for Windows, and Chrome is available free from Google for Windows, Mac, or Linux. If you would like to use VicTouch with a mobile device, like Apple's iPad, please see [help topic 8269 "Using Apple's Guided Access for VicTouch" \[pg:1792\]](#).

In Section 2, choose the directions for the web browser you're using with your VicTouch work stations.

### Section 1 - Setup VicTouch so it does not require login credentials and copy the URL address

If you are setting up multiple VicTouch sign-in stations, you will only need to complete Section 1 once.

1. Login to Volgistics normally.
2. Choose Setup from the [menu \[pg:0215\]](#).
3. Select VicTouch.
4. Select Ground Rules.
5. Locate the "Startup" section pictured here:

**Startup**

Always require login credentials for VicTouch startup

Your public account identifier is: **101**

Your VicTouch access code is:

Use this URL in your desktop shortcut to VicTouch:

<https://www.volgistics.com/ex/touch.dll/?FROM=101&PW=502394297>

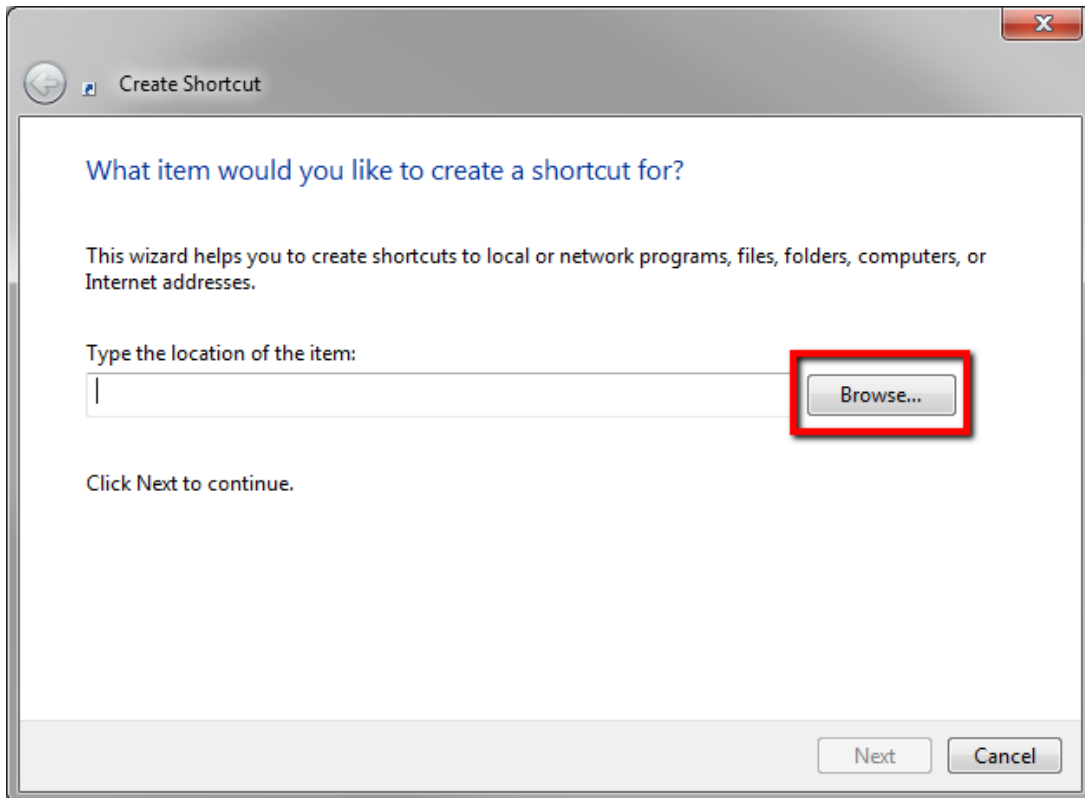
6. Be sure the *Always require login credentials for VicTouch startup* checkbox is not checked.
7. Copy the VicTouch URL (the long string of red text) to your Clipboard by highlighting the text and pressing the "Control" and "C" keys on your keyboard at the same time. You'll need this in Section 2.
8. If you've made any changes, click the **Save** button.
9. If you are working at the computer where you'll be setting up the shortcut, select Exit from the menu and close the web browser window.

Now you have the information you'll need to create a VicTouch shortcut that will launch VicTouch without anyone having to enter account credentials.

## Section 2A - Create a desktop shortcut for launching VicTouch in Internet Explorer

Follow these steps to create a desktop shortcut that will start VicTouch in Internet Explorer's kiosk mode. If you're using Google Chrome, follow the steps in Section 2B instead of these.

1. Right-click an open area on the desktop, point to New, and click Shortcut. This opens the 'Create Shortcut' window shown here:



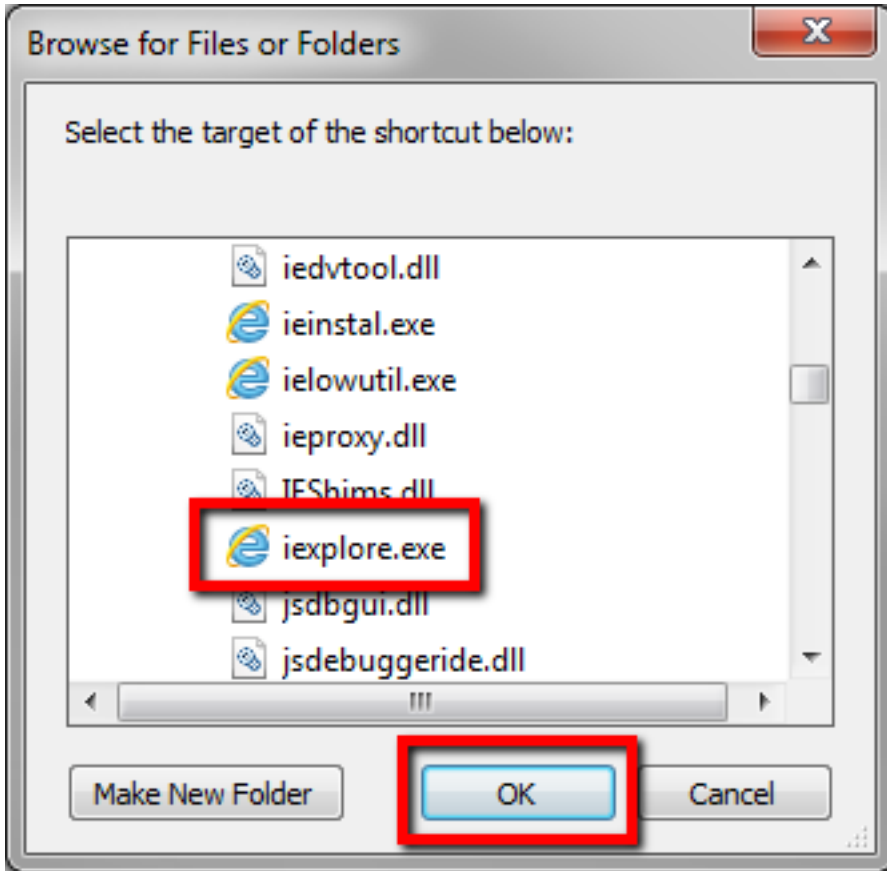
2. Click the Browse button and then navigate to the location of the Internet Explorer program file (iexplore.exe). The Internet Explorer program file is usually located at:

C:\Program Files\Internet Explorer\iexplore.exe

-OR-

C:\Program Files (x86)\Internet Explorer\iexplore.exe

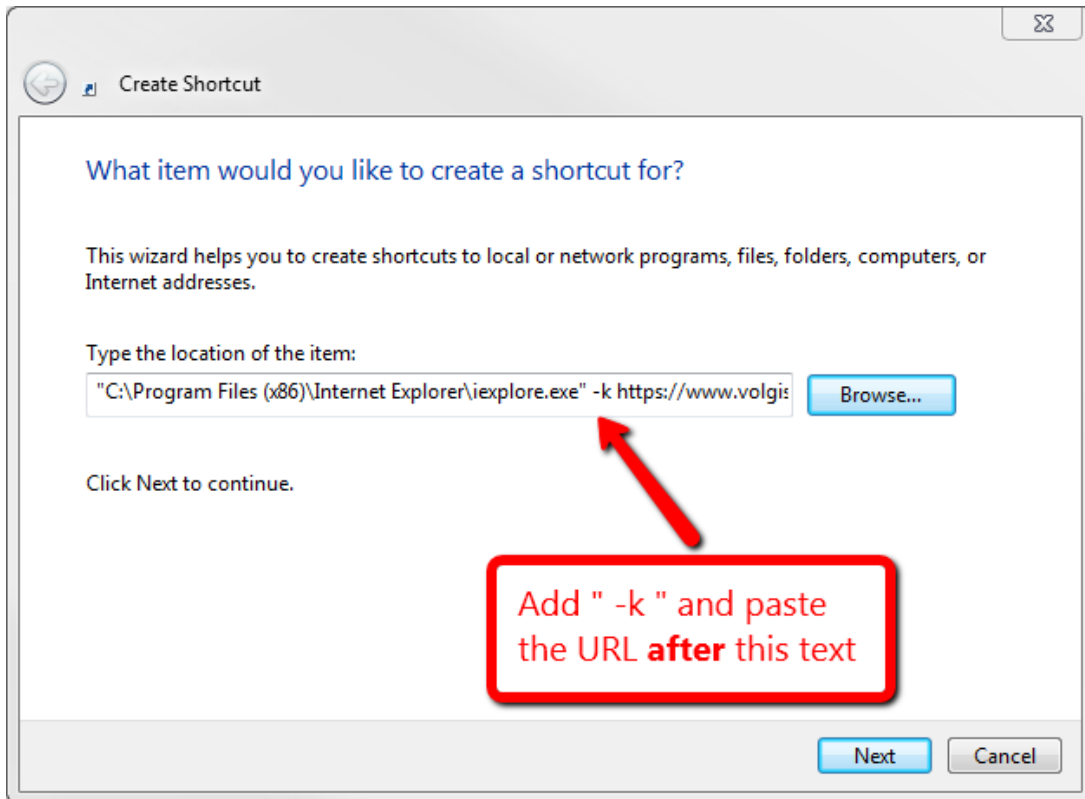
3. Once you've located the Internet Explorer program file (iexplore.exe), click on the name of the file and then the OK button.



4. Before clicking the **Next** button, add **-k** (with a space before and after) after the iexplore.exe file name, and then paste your VicTouch URL after this. You can do this by right-clicking after "k " and selecting **Paste** from the pop-up menu.

The VicTouch URL should be on your computer's Clipboard already from Section 1. If it is not, complete the steps from Section 1 and then begin Section 2A over again. If the path to the iexplore.exe file name appears inside quote characters, enter this text after the closing quote character.





5. Click the **Next** button.

6. Enter "VicTouch" in the Name field.

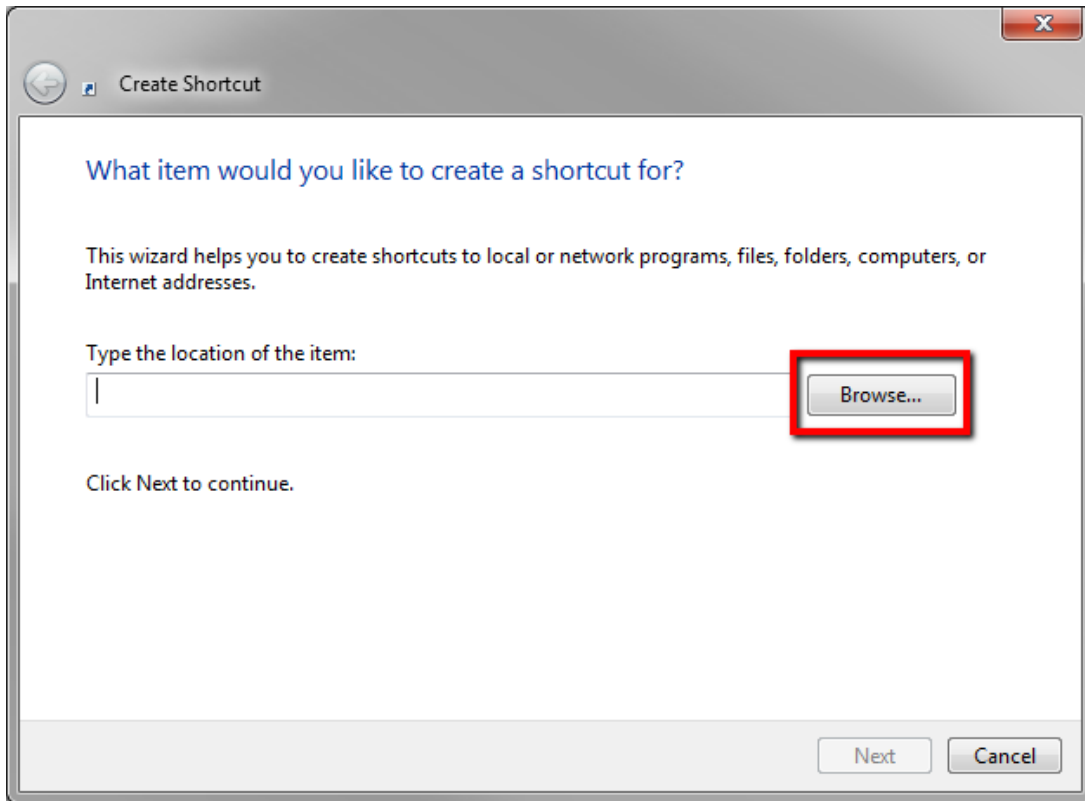
7. Click the **Finished** button.

To launch VicTouch in Kiosk mode, simply double click the VicTouch shortcut you just created. For directions on how to shut down the module, please see [help topic 2283 \[pg:1762\]](#).

## **Section 2B - Create a desktop shortcut for launching VicTouch in Chrome**

Follow these steps to create a desktop shortcut that will start VicTouch in Google Chrome's kiosk mode. If you're using Internet Explorer, follow the steps in Section 2A instead of these.

1. Right-click an open area on the desktop, point to New, and click Shortcut. This opens the 'Create Shortcut' window shown here:



2. Click the **Browse** button and then navigate to the location of the Chrome program file (chrome.exe). The Chrome program file is usually located at:

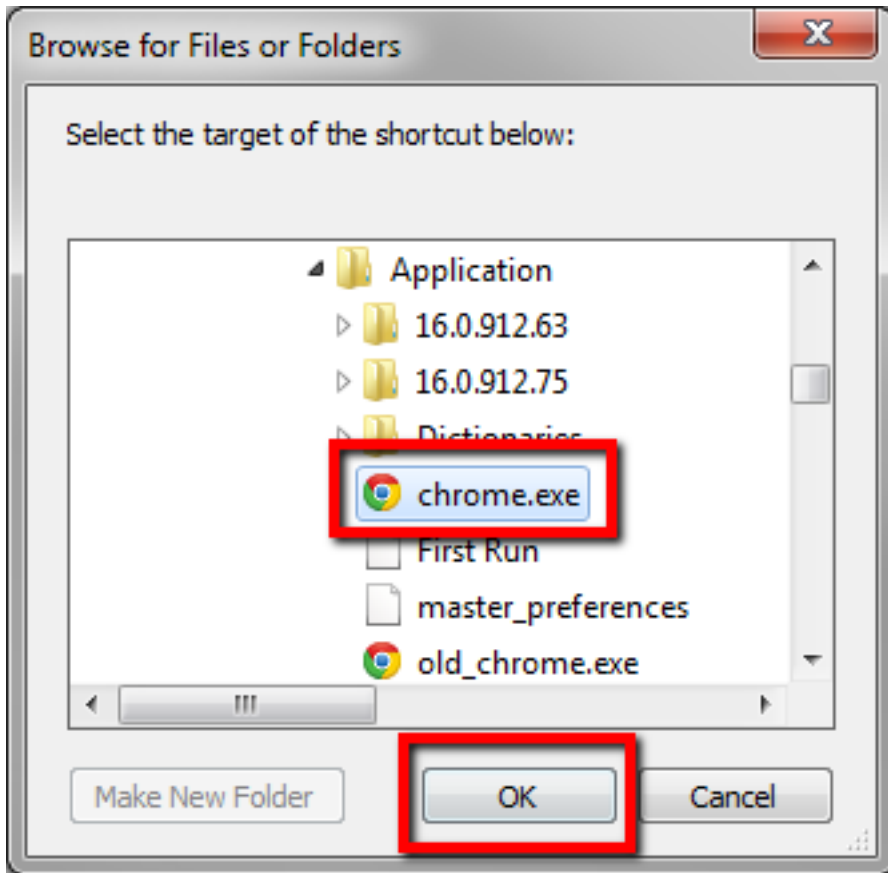
C:\Documents and Settings\{UserName}\Local Settings\Application Data\Google\Chrome\Application

-OR-

C:\Users\{UserName}\App Data\Local\Google\Chrome\Application

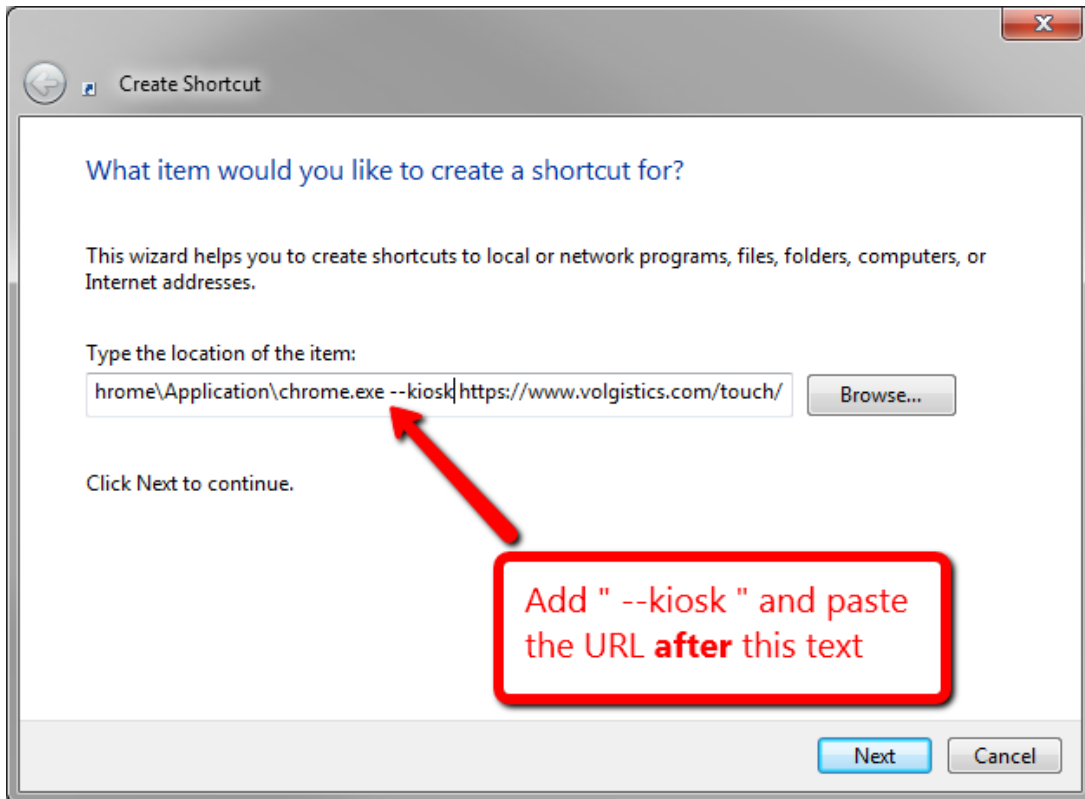
Replace {UserName} with the user name that was used to install Chrome.

3. Once you've located the Chrome program file (chrome.exe), click on the name of the file and then the **OK** button.



4. *Before* clicking the **Next** button, add `--kiosk` (with a space before and after) after the `chrome.exe` file name, and then paste your VicTouch URL after this. You can do this by right-clicking after "kiosk " and selecting **Paste** from the pop-up menu.

The VicTouch URL should be on your computer's Clipboard already from Section 1. If it is not, complete the steps from Section 1 and then begin Section 2B over again. If the path to the `chrome.exe` file name appears inside quote characters, enter this text after the closing quote character.



5. Click the **Next** button.
6. Enter "VicTouch" in the Name field.
7. Click the **Finished** button.

To launch VicTouch in Kiosk mode, simply double click the VicTouch shortcut you just created. For directions on how to shut down the module, please see [help topic 2283 \[pg:1762\]](#).

### Section 3 - Configuring VicTouch to launch during Windows Startup

After completing the sections above, the computer can optionally be configured to launch VicTouch automatically when the VicTouch computer is turned on or restarted.

Complete the following steps at the VicTouch computer for each VicTouch station you want to start automatically when the computer is turned on or restarted.

1. If VicTouch is running, shut-down VicTouch so you see the Windows desktop. Please see [help topic 2283 \[pg:1762\]](#) for help on this if you need it.
2. Right-click on the VicTouch shortcut icon you created and choose **Copy** from the pop-up menu.
3. Click the **Start** button and choose **Programs** or **All Programs**
4. Right-click on the **Startup** folder, and choose **Paste** from the pop-up menu

Now when the computer is restarted, VicTouch will be launched automatically.

## Section 4 - Troubleshooting

If you find that you still need to enter your account credentials when you start VicTouch from this shortcut, repeat the sections listed above. In Section 1, make sure the *Always require login credentials for VicTouch startup* checkbox is not checked and you click the **Save** button before exiting the page.

If you choose to enter your account's URL address by typing it in, make sure you enter the address exactly as it is shown on the VicTouch Ground Rules page. Check to be certain you have entered your public account identifier (not your Volgistics account number) and VicTouch access code exactly as they appear. Also be sure you've entered the question mark (?), and ampersand (&) characters. A simple mistake in the way you type the link will cause it to fail. To prevent errors in entering the information, we recommend that you copy and paste the URL address as shown in Section 1 of this help topic. This will help eliminate many minor typographical errors.

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## Who's Here

Help topic 2307

Added or revised 07-13-2016

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The "Who's Here" page works in combination with [VicTouch \[pg:1778\]](#). It shows you a real-time list of the volunteers who have signed-in so far today, and which assignment they have come to perform. Who's Here is an excellent tool for monitoring who is on-site in organizations where volunteers serve primarily at one or several fixed locations.

### Setup Access to Who's Here

You access Who's Here from within Volgistics. Any Volgistics system operator may be given access to the Who's Here page. The Who's Here page is not currently available to Coordinators or Volunteers through [VicNet \[pg:1724\]](#) or VicTouch.

To setup a Volgistics System Operator so they can – or cannot - access the Who's Here page:

1. Choose Setup from the [menu \[pg:0215\]](#).
2. Select "System Operators."
3. Click on the name of a System Operator.
4. On the [System Operator page \[pg:1433\]](#), under "This operator may have access to..." check "Who's Here" if you want the selected System Operator to have access to the Who's Here page. Uncheck "Who's Here" if you do not want the selected System Operator to have access to the Who's Here page.
5. Click the **Save** button.

### Using Who's Here

To open the Who's Here page, simply choose "Who's Here" from the Volgistics [menu \[pg:0215\]](#).

## Who's Here

1:24 pm

	Tag	Volunteer	Assignment	Time In	Time Out	
Signed-out:	<input type="checkbox"/>	<a href="#">Carter, Kathryn</a>	Greeters	5:56 am	11:32 am	<a href="#">Edit</a>
	<input type="checkbox"/>	<a href="#">Carter, Kathryn</a>	Greeters	6:00 am	11:30 am	
Signed-out:	<input type="checkbox"/>	<a href="#">Feldman, Lance</a>	Greeters	6:02 am	11:31 am	<a href="#">Edit</a>
Signed-out:	<input type="checkbox"/>	<a href="#">Beesley, Margaret ("Margie")</a>	Cardiovascular Waiting Room	7:00 am	11:05 am	<a href="#">Edit</a>
	<input type="checkbox"/>	<a href="#">Beesley, Margaret ("Margie")</a>	Cardiovascular Waiting Room	7:00 am	11:00 am	
<input type="checkbox"/>	<input type="checkbox"/>		Surgery Waiting Room	7:00 am	11:00 am	
Here now:	<input type="checkbox"/>	<a href="#">Morrison, Jerry</a>	Patient Advocate	8:58 am		<a href="#">Edit</a>
Here now:	<input type="checkbox"/>	<a href="#">Torres, Elizabeth ("Lizzy")</a>	Department Assistant	8:58 am		<a href="#">Edit</a>
	<input type="checkbox"/>	<a href="#">Torres, Elizabeth ("Lizzy")</a>	Department Assistant	9:00 am	5:00 pm	
	<input type="checkbox"/>	<a href="#">Morrison, Jerry</a>	Patient Advocate	9:00 am	5:00 pm	
	<input type="checkbox"/>	<a href="#">Mauk, Joy</a>	Gift Shop Manager	9:30 am	3:30 pm	
Here now:	<input type="checkbox"/>	<a href="#">Mauk, Joy</a>	Gift Shop Manager	9:30 am		<a href="#">Edit</a>
Here now:	<input type="checkbox"/>	<a href="#">Barker, Geraldine ("Gerry")</a>	Mail Delivery	9:59 am		<a href="#">Edit</a>
	<input type="checkbox"/>	<a href="#">Barker, Geraldine ("Gerry")</a>	Mail Delivery	10:00 am	2:30 pm	
	<input type="checkbox"/>	<a href="#">Pierce, Pauline</a>	Gift Shop Helper	10:00 am	3:00 pm	
Here now:	<input type="checkbox"/>	<a href="#">Pierce, Pauline</a>	Gift Shop Helper	10:02 am		<a href="#">Edit</a>
	<input type="checkbox"/>	<a href="#">Saenz, Charles ("Chuck") Trainee</a>	Mail Delivery	10:30 am	2:30 pm	
	<input type="checkbox"/>			11:00 am		

You can leave the Who's Here page open (or open it in a full page mode as described in the *Full page* section below) to monitor volunteer arrivals and departures. The Who's Here page automatically updates once every minute so you'll see volunteer arrivals and departures in real time without having to refresh the page manually. If you want to force the page to refresh now, click the **Refresh** button in the lower right hand corner. Otherwise the page will refresh itself automatically every sixty seconds.

If you'd like to go directly to a volunteer's record from the Who's Here page, you can click on the name of the volunteer. You can also [tag \[pg:1529\]](#) volunteer records to use the tags feature to [work with a group \[pg:1530\]](#) of records. **Please note:** It is not possible to go to a volunteer's record or tag a volunteer record when the Who's Here page appears in full page view as described in the *Full page* section below.

### Options

The Who's Here page always lists the volunteers who are currently signed-in. The words "Here now:" appear next to each volunteer on the list currently signed-in. You can customize the page settings to show other options by clicking the **Settings** button in the lower right hand corner. This opens an *Options* window where you can customize your page view. When you're done making changes, click the **Save these Settings** button to keep your page setup. To hide the *Options* window, click the **Hide Settings** button.

3 Volunteers here now  
1 Volunteers signed out

[Help](#)

---

**Options:**

Include:

Who was here

Scheduled volunteers

Schedule openings

Include Site and Place names

Include nicknames

Sort by:

Volunteer

Assignment

Time

Exit to a full page display

### Include

Who was here. If you want the Who's Here page to include volunteers who signed-in earlier today and who since signed-out, check the "Who was here" checkbox. Uncheck the "Who was here" checkbox if you do not want the list to include volunteers who were signed-in earlier today. If you include them, these volunteers appear on the list with the words "Signed-out" next to their name.

Scheduled volunteers. If you want the Who's Here page to include volunteers who are scheduled for today, check the "Scheduled volunteers" checkbox. Uncheck the "Scheduled volunteers" checkbox if you do not want the list to include volunteers scheduled for today. If you include them, scheduled volunteers appear on the list with an icon by their name to show how they were scheduled. See the picture below for more information.

Schedule openings. If you want the Who's Here page to include unfilled [schedule openings \[pg:0776\]](#) for today, check the "Schedule openings" checkbox. Uncheck the "Schedule openings" checkbox if you don't want the list to include today's schedule openings. If you include them, schedule openings appear on the list with an icon by the entry. See the picture below for more information.

#### *Schedule Icons*

- Unfilled schedule opening
- Filled schedule opening
- Scheduled volunteer (who does not fill an opening)

### Include Site and Place names.

If you want the Who's Here page to list the Site and Place the Assignment falls under, check the "Include Site and Place names" checkbox. Uncheck the "Include Site and Place names" checkbox if you want the Assignment names to appear without the Site and Place information. If you include them, the Site and Place will appear in brackets behind the Assignment's name. See [Help topic 2099 \[pg:0096\]](#) if you need more information on how Sites, Places and Assignments are setup.

### Include nicknames.

If you want the Who's Here page to list the information in the volunteer's Nickname field (from the [Core tab \[pg:1868\]](#)), check the "Include nicknames" checkbox. Uncheck the "Include nicknames" checkbox if you do not want the volunteer's Nickname field to appear. If information is entered in the nickname field, it will appear behind the volunteer's name. For example, if a volunteer named *Theodore Smith* has *Teddy* entered in the Nickname field, his name will now appear as *Theodore Smith ("Teddy")*. If no information is entered in the Nickname field, only the volunteer's first and last names will appear.

### Sort by

Use the Sort by options to change the way the Who's Here list is sorted. Choosing "Volunteer" sorts the list alphabetically by the volunteer's last name; choosing "Assignment" sorts the list alphabetically by Assignment name; and choosing "Time" sorts the list according to time-in.

### **Editing service records through Who's Here**

You can use the Who's Here page to make changes to volunteer time-in, time-out, assignment and group size selections. This is useful in situations where volunteers signed-in later than when they actually arrived, chose the wrong assignment, forgot to sign-out, or had volunteers join or leave the group while they were serving.

To edit an entry for a volunteer who is currently signed-in; or for a volunteer who has already signed-out today; click the Edit link next to their name. This opens the entry in an edit box like the one shown here:

Here now:	Blackport, Henry	Coordinator and Chairperson	9:13 am	Edit	
Here Now:					
Volunteer: Binkman, Sara					
Time in:	9	:	14	am	Add Current Time
Time out:		:		am	Add Current Time
Assignment:	Room Visitor [Great Lakes Community Hospital\South Campus]				
				Save	Cancel
Here now:	Jeter, Susan	Parking Lot Clean-up	10:13 am	Edit	

Use the "Time-in," "Time-out," "Assignment," and "Group Size" fields to make any changes you'd like. The "Group Size" field will only appear if you have setup VicTouch to accept [group \[pg:1909\]](#) sign-in and the field being edited is a group record. [Help topic 1212 \[pg:1759\]](#) explains more.

You can click the

### **Add Current Time**

button to insert the present time into the "Time-in" or "Time-out" fields. This time is taken from the local computer that is being used to edit the service entry so it may appear different than the sign-in and sign-out times set by the default time settings for your account. [Help topic 2111 \[pg:1383\]](#) explains more about where to find and set the default time setting for your account. Click the **Save** button to save your changes. Click the **Cancel** button to close the edit box without saving any changes.

If a volunteer is currently signed-in, and they indicate that they actually arrived earlier than when they signed-in (for example, they may have forgotten to sign-in initially), you can optionally use the edit box to change their Time-in to the earlier time. In this case you would leave the Time-out field blank. The volunteer will still be signed-in, and their time-out will be recorded as usual when the volunteer later signs-out at VicTouch.



If a volunteer is currently shown to be "Here now," but you determine that they have actually left and forgotten to sign-out, you can optionally use the edit box to sign them out and record their time-out. Simply enter what you've determined to be their actual time-out in the "Time-out" field. This will cause their hours to be recorded for the times indicated, as if they had signed-out at VicTouch regularly. Note that if volunteers forget to sign-out, VicTouch will eventually sign them out automatically, according to the way you've configured your system. Help topic [2214 \[pg:1511\]](#) explains this automatic sign-out process further.

### **Full page**

While you're working in Volgistics, you can view the Who's Here page anytime you want to see who has signed-in or out simply by choosing Who's Here from the menu. If you want to leave the Who's Here page running on your desktop, or display it on a wall-mounted monitor, you can switch to a full page display by clicking the **Full page** button.

When you click the **Full page** button, you will exit from your current Volgistics session, however the Who's Here page will continue to run, and it will fill your entire browser window.

If you'd like to leave the Who's Here page running in a browser window on your computer desktop continuously, and use Volgistics at the same time, click the **Full page** button, open a new browser window (or frame), and then login to Volgistics again normally. You'll have Who's Here running in one window and Volgistics in another.

### **Current time**

The Who's Here page displays the current time for the time zone selected for your Volgistics System Operator profile. If the time that appears on the Who's Here page is not the correct time for your time zone, you (or your organization's [Volgistics Administrator \[pg:0052\]](#)) should update the time zone setting for your System Operator profile. [Help topic 2111 \[pg:1383\]](#) explains how to do this.

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## **Greeting Cards**

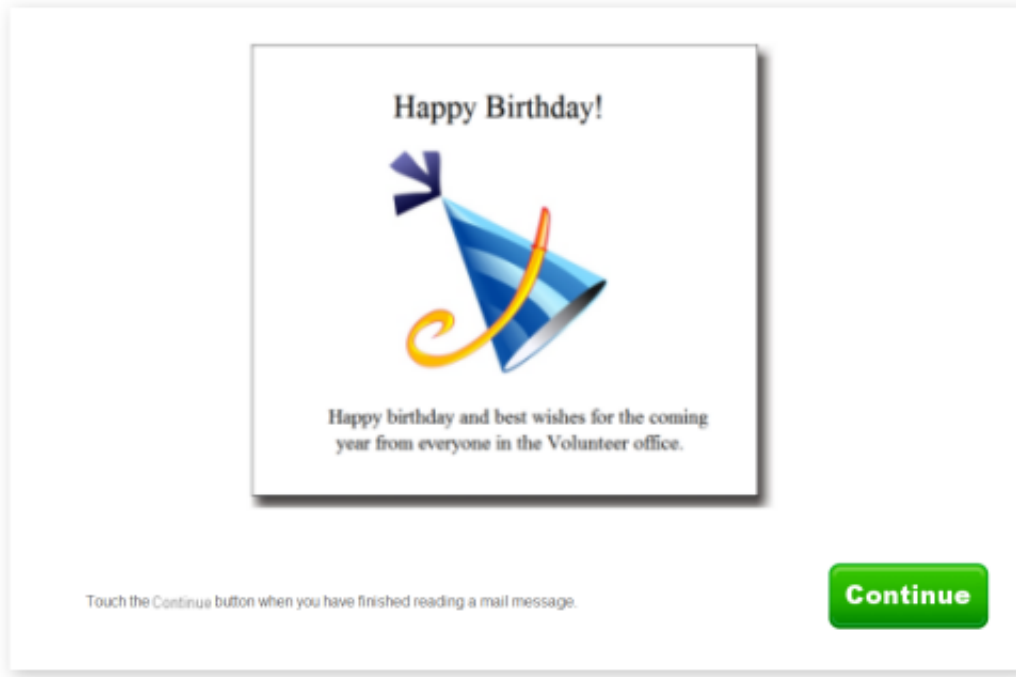
Help topic 2326

Added or revised 10-26-2007

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If you use the [VicTouch \[pg:1778\]](#) module you can optionally deliver electronic greeting cards to volunteers as they check-in. This is a friendly way to wish volunteers a 'happy birthday' or to pass along a holiday greeting. Volunteers receive your greeting cards when they check-in on the days you've scheduled greeting cards to be delivered.

A sample 'Happy Birthday' card is shown here.



Greeting cards come with several stock images. You can either use these stock greeting card images, or upload your own greeting card graphics.

You can setup Volgistics to deliver the following types of greeting cards:

#### Birthday greetings

Electronic birthday cards may be delivered automatically on or around a volunteer's birthday. A volunteer must have (at least) a month and day of birth entered in the 'Date of birth' field on their Profile tab in order to receive a birthday card.

#### Start date anniversary cards

Electronic "Start date anniversary" cards may be delivered automatically on or around the anniversary of each volunteer's [start date \[pg:1890\]](#) to acknowledge another year of volunteer service.

#### Holiday cards

You can send holiday cards for specific date ranges that you specify. For example, you could post a 'Happy New Years' greeting the last week of December.

### **How to setup greeting card delivery**

If you have access to the Setup page you can setup VicTouch greeting card delivery like this:

1. Choose Setup from the [menu \[pg:0215\]](#).
2. Select 'VicTouch.'
3. Select 'Greeting Cards.'

4. Follow the instructions in [help topic 2327 \[pg:1520\]](#) to setup greeting card delivery.

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## VicTouch

Help topic 3021

Added or revised 05-16-2016

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VicTouch is the optional Volgistics module used to provide interactive onsite touchscreen kiosks for volunteers. Among other features, VicTouch provides a time-clock function volunteers can use to check in and out when they arrive and depart.

VicTouch kiosks are ideal for organizations where volunteers serve primarily on-site at a specific facility or campus. If this describes your organization - and you track volunteer hours - VicTouch is a great solution. It can eliminate manual record keeping for service hours altogether, and give you a precise record of which volunteers were onsite, and when.

### Why Is It Called VicTouch?

*Vic* stands for *Volunteer Information Center* and *Touch* is how you access the module (through a touchscreen). Thus the name *VicTouch*.

There is also a module called *VicNet*. Don't confuse VicTouch with VicNet. [VicNet \[pg:1724\]](#) is used to give volunteers and [Coordinators \[pg:0163\]](#) a way to interact with Volgistics system via the Internet. While the main purpose of *VicTouch* is to serve as a time clock at your facility.

You don't need to use VicTouch to use Volgistics. If your volunteer program is less centralized – or you don't want to use interactive kiosks – simply use Volgistics without the optional VicTouch module (you can still collect and track volunteer hours in Volgistics without VicTouch).

A volunteer must be in your Volgistics database before they can use VicTouch.

This help topic explains more about what equipment you need for VicTouch, how VicTouch is set up, what volunteers see when they use VicTouch, and other information about the module. You can click on a link in the *Contents* box below to go directly to a section of the help topic.

### Contents

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[Viewing Schedule and Self-Scheduling](#)

[Viewing Service History](#)

## Shutting Down VicTouch

## Let's Review

### Try It Out

#### What You Need to Use VicTouch

VicTouch is designed for use at a computer that has a touchscreen monitor attached to it. [Touchscreen monitors \[pg:1744\]](#) enable volunteers to interact without having to use a keyboard or a mouse so they're great even for people who are not familiar with computers. It has a very simple, intuitive interface so just about anyone with very basic English skills can use the system.

While VicTouch is designed to work at a touchscreen equipped computer, you can run VicTouch at a computer with a regular monitor for testing or evaluation purposes. When you run VicTouch at a computer with a regular monitor, you interact using your mouse rather than touching the screen as you would if a touchscreen monitor were attached.

The computer(s) you use to run VicTouch must have an Internet connection. Like Volgistics, VicTouch is a hosted application that uses the Internet to connect to your Volgistics database. As long as your VicTouch computer has a connection to the Internet, it does not need to be connected to your organization's internal network (except if the route to the Internet is through your internal network).

You can run VicTouch at as many locations as you'd like, as long as each station has a PC with an Internet connection. If you have more than one VicTouch station, Volunteers can sign-in at one station, and sign-out at another. The monthly [service fee \[pg:0710\]](#) for VicTouch is the same no matter how many stations are set up.

Kiosks, or specially built cabinets or pedestals used to hold the touchscreen monitor and the PC it is attached to, are not required for the VicTouch station, but they do offer a good degree of security when the station is located in an unattended public area. When a kiosk is not used, VicTouch workstations are often located at information desks, on a counter in the volunteer office, or on tables or shelves near the location(s) where volunteers arrive and depart. In some installations where security is a concern, the VicTouch computer and monitor are secured to a counter or desktop with security cables, or placed inside small, vented PC cabinets instead of inside a kiosk.

#### **Can I Use a Tablet for VicTouch?**

With the growing popularity of touchscreen tablets, many organizations are opting to use these devices for VicTouch instead of computers with touchscreen monitors. VicTouch can be launched on any device with a reliable Internet connection so this is perfectly fine. The main concerns regarding tablets revolve around security. Because tablets are small and portable, you should consider the security of the actual device itself. Also, for secure and reliable operation, we recommend that VicTouch is launched in kiosk mode to restrict the user to just the VicTouch module. This may be more complicated on a tablet. Please see the Kiosk Mode for Tablets box

[below for more information.](#)  
**Set Up a VicTouch Computer**

For security and reliability, we recommend setting up the web browser you use for VicTouch to launch in *kiosk mode*. Kiosk mode displays VicTouch without any of the typical operating system controls, such as borders, title bars, menus, and tool bars. Removing these controls prevents users from going to other web sites, or easily closing the browser window.

Microsoft Internet Explorer and Google Chrome both have built-in kiosk mode options so these are the web browsers we recommend and support for VicTouch. [Help topic 2289 \[pg:1765\]](#) explains how to configure Internet Explorer or Chrome to launch VicTouch in kiosk mode. You may be able to use other web browsers instead of Internet Explorer or Chrome if you purchase software to enable the browser to display in kiosk mode.

Setting up the computer to use VicTouch may also require additional steps. Please follow the directions in [help topic 8271 \[pg:1527\]](#) to ensure your computer is correctly set up for VicTouch.

## Kiosk Mode for Tablets

Most tablets use different web browser software than desktop computers. So you may, or may not, be able to launch VicTouch in kiosk mode through the web browser. Apple devices come with a feature called *Guided Access* that can be used to emulate kiosk mode. [Help topic 8269 \[pg:1792\]](#) has instructions on how to use this feature with VicTouch. Other tablets may have features similar to this. You will need to ask the retailer or manufacturer of the tablet if something like this is offered with their product. If a built-in feature is not available, we recommend using a third party app on the tablet so VicTouch is displayed in kiosk mode.

**Please note that we do not endorse or support any specific tablet or related software (such as an app).** It is up to you to research, purchase, and set up any tablet used for VicTouch, along with any kiosk software that may be needed.

Even with kiosk mode turned on, it's a good idea for you, or your organization's IT department, to "lock down" your VicTouch computer or device, especially if it's located in a public area. Locking-down a computer prevents people from accessing your network or changing the way the computer or device is set up. The specific steps for "locking down" a computer or device vary with different operating systems, devices, and network configurations--so providing instructions on how to do this is beyond the scope of this help topic. However, your organization's IT department or computer support person should be able to do this.

### **How VicTouch Works**

You can customize many VicTouch features, such as adding your own logo graphic; customizing the instructions on each screen; and tailoring the way volunteers choose the assignment they have come to perform. Here's what a *typical* sign-in process might look to a volunteer.

## Sign-in for Individuals

First, volunteers enter their PIN (you can learn more about volunteer PIN's in [help topic 2152 \[pg:1856\]](#)).

# Volunteer Information Center



Welcome. The Volunteer Information Center is where volunteers check-in and out. If you are ready to check-in or out, enter your PIN to get started.

If you are interested in volunteering, or you have trouble checking-in or out, please contact Linda in Volunteer Services (ext. 302).

## Enter your volunteer PIN number

Enter your volunteer ID number using the keypad buttons, and then touch the Continue button.

1	2	3	
4	5	6	Cancel
7	8	9	← Backspace
*	0	#	Continue

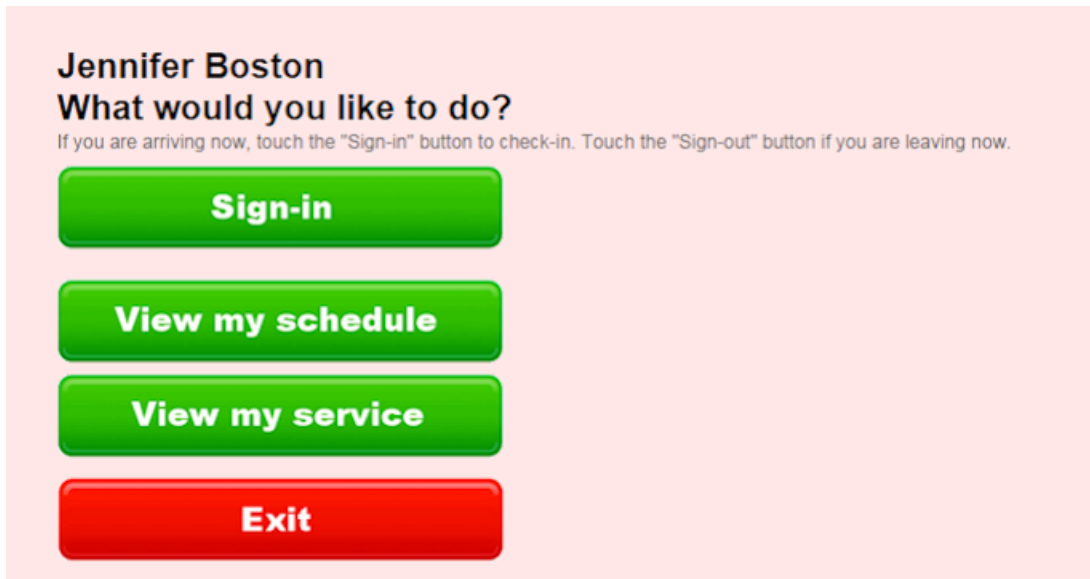
Next the volunteer will be prompted to verify if they have the correct record. If they made a mistake entering their PIN, they can press the **No** button to cancel the sign-in process.

## Is this Jennifer Boston ?

If you're not the volunteer whose name is shown, please press "No" and try to sign-in again. If you need additional help, please contact the Volunteer Services office.

Yes
No

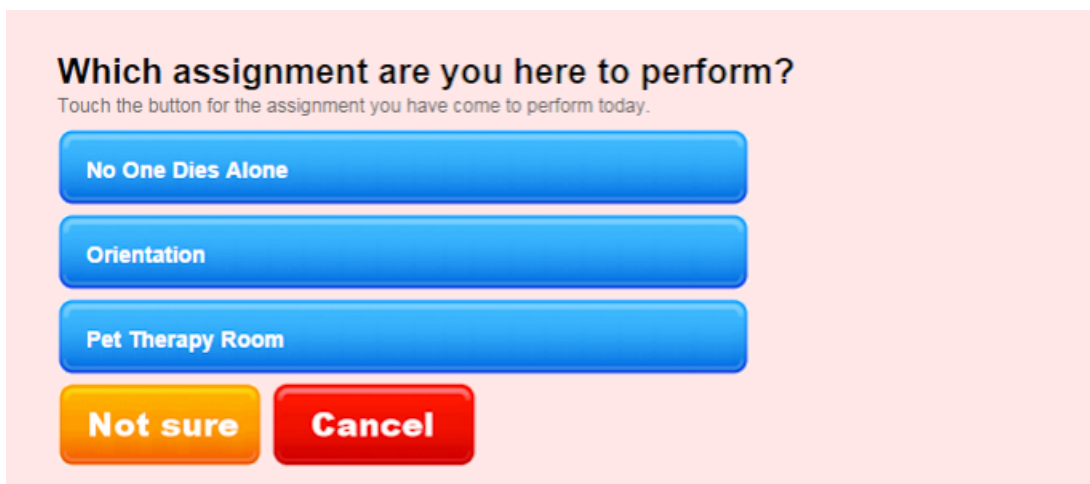
Once the volunteer confirms his or her identity, they press the **Sign-in** button to continue with the sign-in process.



If your account is set up to ask volunteers to choose the assignment they are serving in, they will see a screen asking them to choose their assignment. You can opt to include a

#### **Not sure**

button for volunteers who do not know their assignment. You can also customize which assignments appear for the volunteer to choose from. [Help topic 2224 \[pg:1515\]](#) explains how to select the options volunteers see on this page.



After the volunteer makes their selection, a confirmation screen appears in case they have made a mistake during sign-in.

## Is this information correct?

If the information shown is correct, touch the Yes button. Touch the No button if you want to start over.

Name: **Jennifer Boston**

Date: **Monday, September 29, 2014**

Time in: **1:29 pm**

Assignment: **Pet Therapy Room**

Yes

No

Once they confirm their selections, a volunteer is officially signed-in. Volunteers should sign-out at VicTouch using a similar procedure at the end of their duty.

You can quickly see the volunteers who have completed the sign-in process by going to the *Who's Here* page in your account. You can learn more about this page in [help topic 2307 \[pg:1772\]](#).

The screenshot shows the 'Who's Here' page in the Volgistics interface. The page title is 'Who's Here' and the current time is 3:25 pm. A sidebar on the left contains navigation links: Volunteers, Assignments, Coordinators, Schedule, Tickler, Post, Tags, Sets, Print, Mailbox, Who's Here (highlighted), Setup, Welcome, Help, and Exit. The main content area displays a table of active volunteers with columns for Tag, Volunteer, Assignment, Time In, Time Out, and Edit. Below the table are 'Tag these' and 'Un-tag these' buttons and a note that 20 volunteers are currently here.

Tag	Volunteer	Assignment	Time In	Time Out	Edit
Here now:	<input type="checkbox"/> <a href="#">Coronado, Amy</a>	Physical Therapy Assistant	10:55 am		Edit
Here now:	<input type="checkbox"/> <a href="#">Baccus, Lydia</a>	Laboratory Services Reception Desk	10:57 am		Edit
Here now:	<input type="checkbox"/> <a href="#">Boston, Jennifer</a>	Pet Therapy Room	1:29 pm		Edit
Here now:	<input type="checkbox"/> <a href="#">McGary, David</a>	Emergency Department	1:35 pm		Edit
Here now:	<input type="checkbox"/> <a href="#">Littlefield, James</a> Group: Comstock Park Rotary Club (6)	Special Projects	2:00 pm		Edit
Here now:	<input type="checkbox"/> <a href="#">Scarberry, Michael</a> Group: Great Lakes Volunteers (7)	Special Projects	2:01 pm		Edit
Here now:	<input type="checkbox"/> <a href="#">Becker, Anna</a>	Gift Shop Helper	2:59 pm		Edit
Here now:	<input type="checkbox"/> <a href="#">Gatto, Keith</a>	Gift Shop Helper	3:07 pm		Edit
Here now:	<input type="checkbox"/> <a href="#">Robinson, Sharon</a>	Emergency Department	3:10 pm		Edit

↑  
Tag these Un-tag these

20 Volunteers here now

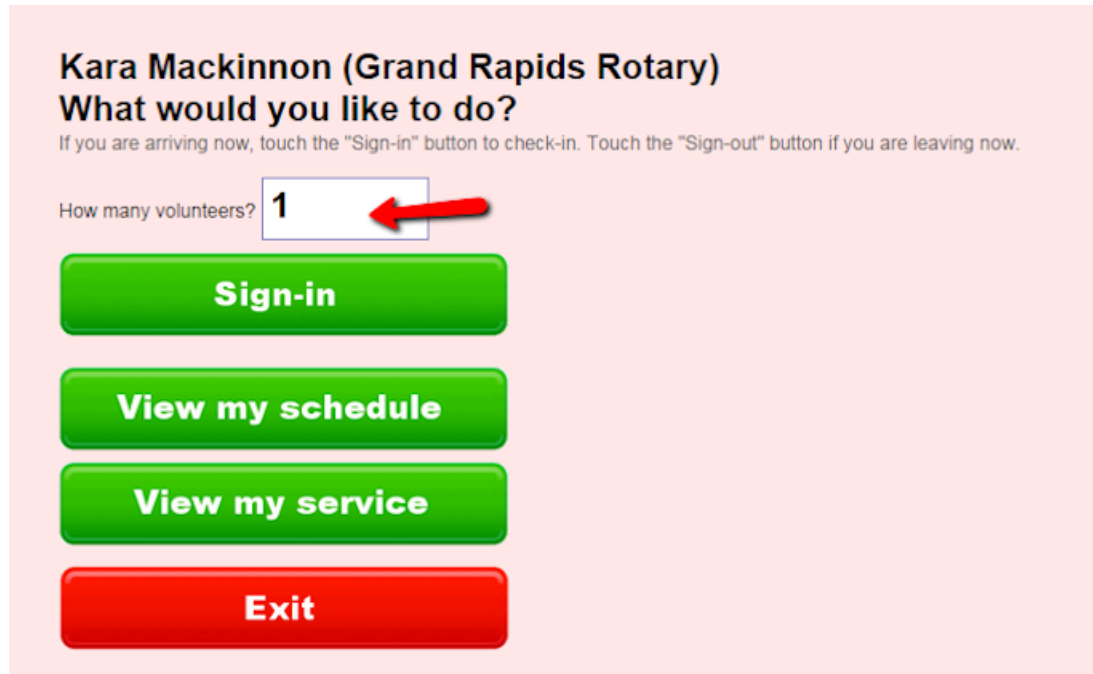
As soon as a volunteer signs-out, Volgistics automatically adds a service record for them showing their time-in, time-out, the Assignment they served in (if they selected one when they signed-in), and the number of hours they performed. You'll see these entries on the [Service tab \[pg:1581\]](#) in the volunteer's record.



VicTouch also includes features for detecting if a volunteer who signed-in has forgotten to sign-out. This feature will automatically sign-out these volunteers after a set interval. [Help topic 2214 \[pg:1511\]](#) explains how to set up this feature. You can optionally audit service entries posted for volunteers who forget to sign-out. See [help topic 1208 \[pg:1415\]](#) to learn more about auditing service entries.

### Sign-in for Groups

If your account uses [group records \[pg:1909\]](#), the sign-in process for groups is very similar to how individuals sign-in. The main difference is that the group leader will sign-in for the entire group of volunteers who are there to serve. After they confirm their identity, a field will appear that allows the leader to select how many volunteers are serving in the group.



The screenshot shows a mobile application interface for a group leader. At the top, it displays the name 'Kara Mackinnon (Grand Rapids Rotary)' and the question 'What would you like to do?'. Below this, there is a small instruction: 'If you are arriving now, touch the "Sign-in" button to check-in. Touch the "Sign-out" button if you are leaving now.' A text input field labeled 'How many volunteers?' contains the number '1', with a red arrow pointing to it. Below the input field are four large, rounded buttons: 'Sign-in' (green), 'View my schedule' (green), 'View my service' (green), and 'Exit' (red).

The leader can touch this field and then enter the number in the group using the keypad.

## Kara Mackinnon (Grand Rapids Rotary)

### What would you like to do?

If you are arriving now, touch the "Sign-in" button to check-in. Touch the "Sign-out" button if you are leaving now.

How many volunteers?

1	2	3	
4	5	6	Cancel
7	8	9	← Backspace
*	0	#	Continue

[Help topic 1212 \[pg:1759\]](#) has more information on how to set up and use VicTouch for groups.

### Switching Assignments

You may have volunteers who serve in more than one assignment, or position, at your organization during the same day. In this case, you can include a *Switch assignments* button to simplify the sign-out/sign-in process for them when they move from one assignment to another. The volunteer will sign-in to their first assignment as shown above. When they are ready to move from one assignment to the next, they just enter their PIN, confirm their identity, and press the **Switch assignments** button. This will sign them out of the first assignment and bring them to a screen where they can sign-in to the second assignment.

**Jennifer Boston**  
**What would you like to do?**

If you are arriving now, touch the "Sign-in" button to check-in. Touch the "Sign-out" button if you are leaving now.



To enable this feature, be sure the checkbox to include a **Switch assignments** button is checked on the [Menu Screen Setup \[pg:1508\]](#) page.

### **Vic Mail Messages**

Messaging features enable you to post messages for individual volunteers, all volunteers, or specific groups of volunteers. Volunteers receive your messages when they sign-in or out. To send messages through VicTouch, you must have [message delivery enabled \[pg:1510\]](#).

## Mail for Jennifer Boston



Message  
Date: Monday, September 29, 2014  
Subject: New Parking Pass

Hi Jennifer,

Please stop by the volunteer office (room 3029) before you leave today.  
Your new parking pass is ready for you to pick-up.

Thanks,  
Linda Sherman  
Volunteer Services Manager

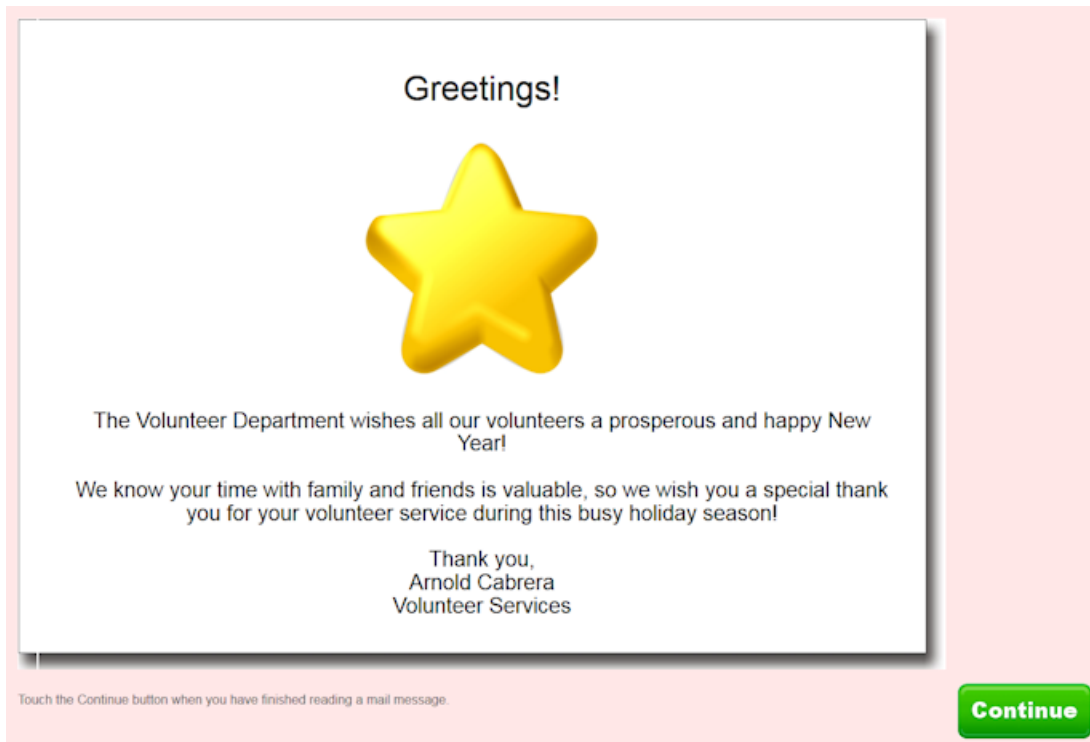
Touch the Continue button when you have finished reading a mail message.

**Continue**

You can learn more about how to send Vic Mail in [help topic 1127 \[pg:0315\]](#).

### **VicTouch Greeting Cards**

VicTouch also has a feature that will automatically display a birthday, or start date anniversary, card to the volunteer when he or she signs-in around their special day. This can also be used to send holiday cards when a volunteer signs-in during a date range you select. You can use the stock graphics for the Greeting Cards, or upload your own images.



For more information on the Greeting Card feature, please see help topics [2326 \[pg:1776\]](#) and [2327 \[pg:1520\]](#).

### Viewing Schedule and Self-Scheduling

You can also set up VicTouch to allow volunteers to look at the schedule to see when they are scheduled to serve next. You enable this on the [VIC My Schedule Setup Page \[pg:1453\]](#). If this is enabled, volunteers will see a **View my schedule** button after they enter their PIN and confirm their identity.

When volunteers view the schedule, they can select to have their schedule for the month sent to them by email or text as long as this is [enabled in your account \[pg:1595\]](#).

You can also set up [self-scheduling \[pg:1494\]](#) so that your volunteers can sign-up for shifts at the VicTouch kiosk.

## Schedule for Jennifer Boston

Touch any date to see the schedule for that day.



◀ Sep 2014

Nov 2014 ▶

Email me a copy

Finished

We need volunteers on days that have the Help wanted symbol. Touch any of these days to learn more or to sign-up.



### October 2014

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
			1	2	3	4 9:30 a to 11:30 a Pet Therapy Room
5 9:30 a to 11:30 a Pet Therapy Room	6	7	8	9	10	11 9:30 a to 11:30 a Pet Therapy Room
12 9:30 a to 11:30 a Pet Therapy Room	13	14	15	16	17	18 9:30 a to 11:30 a Pet Therapy Room
19 9:30 a to 11:30 a Pet Therapy Room	20	21	22	23	24	25 9:30 a to 11:30 a Pet Therapy Room
26 9:30 a to 11:30 a Pet Therapy Room	27	28	29	30	31	

If self-scheduling is enabled, volunteers will see a *Help Wanted* icon on the dates with available shifts that they are qualified to serve in. If they select a date, they will see details for the shifts and a **Schedule me** button they can press to sign-up.

### Schedule for Monday, October 20, 2014

Return to calendar

Finished

#### Openings & scheduled volunteers:

##### Pet Therapy Room

2:00 p to 4:00 p      Would you like to serve on this date? Click the Schedule-Me button to schedule yourself here  
1 volunteer still needed

Schedule me

7:00 p to 9:00 p      Flores, Iva

If you allow it, volunteers can also remove themselves from shifts if they cannot make it. To do this, they will need to press a date they are signed-up to serve on, and then press the **Remove me** button.

## Schedule for Monday, October 20, 2014

Return to calendar

Finished

Your schedule for this date:

2:00 p to 4:00 p

Pet Therapy Room [Main Hospital/Rehabilitation]

Can't serve on this date? Touch the Remove Me button to remove yourself from these times

Remove me

Openings & scheduled volunteers:

Pet Therapy Room

2:00 p to 4:00 p

Boston, Jennifer

7:00 p to 9:00 p

Flores, Iva

When the volunteer is done viewing the schedule, or scheduling him or herself, pressing the **Finished** button will return them to the menu screen.

### Viewing Service History

It's often motivating for volunteers to see their own time and service contributions. You can provide volunteers a way to do this through the VicTouch module. If you allow volunteers to view their service, they will see a **View my service** button after they enter their PIN and confirm their identity.

The volunteer's service information is collapsed by year initially:

### Service history for Jennifer Boston

Totals  
Start date: October 25, 2012  
Year-to-date hours: 146:09  
Life hours: 384:39

Year	Hours	Merit Hours	Absences
2014	146:09	273:54	0
2013	206:00	206:00	0
2012	32:30	32:30	0
Life total	384:39	512:24	0

Finished

If the volunteer presses the **View details for year** button, the screen will show all the service entries for the year that was selected:

## Service history for Jennifer Boston

### Totals

Start date: October 25, 2012

Year-to-date hours: 146:09

Life hours: 384:39

### 2012 Service

Date	Assignment	Times	For	Hours	Merit Hours	Absences
12-30-2012	Pet Therapy Room	9:30 a to 11:30 a		2:00	2:00	0
12-29-2012	Pet Therapy Room	9:30 a to 11:30 a		2:00	2:00	0
12-23-2012	Pet Therapy Room	9:30 a to 11:30 a		2:00	2:00	0
12-22-2012	Pet Therapy Room	9:30 a to 11:30 a		2:00	2:00	0
12-16-2012	Pet Therapy Room	9:30 a to 11:30 a		2:00	2:00	0
12-15-2012	Pet Therapy Room	9:30 a to 11:30 a		2:00	2:00	0
12-09-2012	Pet Therapy Room	9:30 a to 11:30 a		2:00	2:00	0
12-08-2012	Pet Therapy Room	9:30 a to 11:30 a		2:00	2:00	0
12-02-2012	Pet Therapy Room	9:30 a to 11:30 a		2:00	2:00	0
12-01-2012	Pet Therapy Room	9:30 a to 11:30 a		2:00	2:00	0
11-25-2012	Pet Therapy Room	9:30 a to 11:30 a		2:00	2:00	0
11-24-2012	Pet Therapy Room	9:30 a to 11:30 a		2:00	2:00	0
11-18-2012	Pet Therapy Room	9:30 a to 11:30 a		2:00	2:00	0
11-17-2012	Pet Therapy Room	9:30 a to 11:30 a		2:00	2:00	0
11-11-2012	Pet Therapy Room	9:30 a to 11:30 a		2:00	2:00	0
10-09-2012	Orientation	7:00 a to 9:30 a		2:30	2:30	0
2012 total				32:30	32:30	0

**Finished**

**View service  
for all years**

When the volunteer is done viewing their service, pressing the **Finished** button will return them back to the menu screen.

You can enable volunteers to see their service in VicTouch, and customize the instructions on the page, on the *VIC My Service Setup Page*. To get to this page:

1. Select [Setup \[pg:0887\]](#) from the menu.
2. Expand the VicTouch link.
3. Select *Service history screen*.

### **Shutting Down VicTouch**

If you run VicTouch in the web browser's kiosk mode as recommended, you'll notice that the usual operating system controls for minimizing or closing the VicTouch application are not visible on the screen. If the computer where VicTouch is used has not been locked-down, and a keyboard is attached, you can close the browser window where VicTouch is running by pressing ALT-F4 (the ALT key and the F4 key at the same time) on the keyboard.

Otherwise, you will need to enter a special code on the keypad screen in order to exit kiosk mode. [Help topic 2283 \[pg:1762\]](#) explains how to find out what the code is and where to enter the code to shutdown the VicTouch module.

### **Let's Review**

- VicTouch is the optional module you can use to set up interactive, onsite, touchscreen kiosks volunteers can use to sign-in and out when they arrive and depart.
- You are not required to use VicTouch. You can collect and track volunteer service in Volgistics even if you
- don't use the VicTouch module. [Help topic 1166 \[pg:1568\]](#) shows other ways service can be collected.



- While the VicTouch module is best when used at a touchscreen equipped computer, you can test VicTouch at any computer by using the mouse rather than a touchscreen monitor to make selections on the screen.
- When volunteers sign-in and out at VicTouch, their service is automatically recorded on the [Service tab \[pg:1581\]](#) in their record.
- VicTouch includes features for detecting when volunteers have forgotten to sign-out, and will sign them out automatically.
- You can optionally [audit service entries \[pg:1415\]](#) made for volunteers who forgot to sign-out.

## Try It Out

Volgistics trial accounts include VicTouch, and you can try VicTouch even without a touchscreen monitor. Here is how you can do this:

1. If you haven't already, enter at least one volunteer record in your database and make that volunteer have the Active [Status \[pg:1832\]](#). You can find directions on how to enter a record manually in [help topic 2298 \[pg:1877\]](#).
2. Note the volunteer's [number \[pg:1856\]](#) on the [Core tab \[pg:1868\]](#) of their record. This is their PIN.
3. Select [Setup \[pg:0887\]](#) from the menu.
4. Expand the VicTouch link.
5. Select *Launch at this computer*.
6. Use your computer's mouse to click the buttons to enter the volunteer's PIN and finish signing them in.
7. You can view the volunteer as being signed-in on the [Who's Here \[pg:1772\]](#) page for your account.
8. After you sign the volunteer out, you can [see a service entry \[pg:1579\]](#) for the service on the [Service tab \[pg:1581\]](#) of their record.

## Related help

- [Help Topic 1072 \[pg:1408\]](#) - Auditing Vic Service Entries
- [Help Topic 1184 \[pg:1755\]](#) - Getting Started with VicTouch
- [Help Topic 2152 \[pg:1856\]](#) - Using Volunteer Numbers
- [Help Topic 2166 \[pg:0731\]](#) - How do I change the service level on my account?
- [Help Topic 2214 \[pg:1511\]](#) - VicTouch Ground Rules
- [Help Topic 2283 \[pg:1762\]](#) - Shutting-down VicTouch
- [Help Topic 2307 \[pg:1772\]](#) - Who's Here
- [Help Topic 2326 \[pg:1776\]](#) - Greeting Cards
- [Help Topic 2534 \[pg:0082\]](#) - VicNet and VicTouch Trials
- [Help Topic 8270 \[pg:1523\]](#) - Setting-Up Internet Explorer for VicTouch

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## Using Apple's Guided Access for VicTouch

Help topic 8269

Added or revised 10-02-2013

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With the release of iOS 6, Apple introduced "Guided Access" to most iOS devices. This allows users to lock the device to a single app, disable areas of the screen, and prevent the orientation from changing when turning the device. We feel that these security features are robust enough to allow usage of [VicTouch \[pg:1778\]](#) on these iOS devices.

## 6 iOS 6 is compatible with:



### Configuring Guided Access

First, you will need to configure Guided Access for your device.

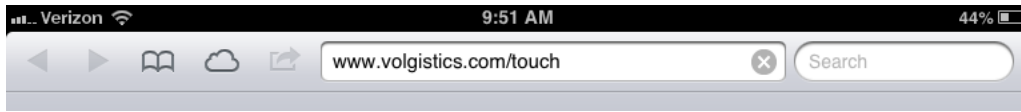
1. Open Settings and choose "General"
2. Select "Accessibility"
3. Under "Learning" select "Guided Access"
4. Move the slider to "ON"
5. Touch "Set Passcode" to setup a 4-digit passcode, used to exit Guided Access. This passcode is unique to Guided Access, and not connected with any other passcode you use on this device. You can also choose whether or not you would like to allow the screen to sleep. We recommend turning this setting "ON" to save battery life.



6. Close the Settings app

### Launching VicTouch

1. Open Safari
2. Navigate to [www.volgistics.com/touch](http://www.volgistics.com/touch)



3. Enter your login credentials and touch the Continue button.



## Login

VicTouch is the touch screen kiosk program you use with Volgistics to provide on-site time clock, scheduling, and communication features for volunteers. You need a Volgistics account in order to use VicTouch. To get a Volgistics account, or to learn more about Volgistics visit [www.volgistics.com](http://www.volgistics.com).

It's best to run VicTouch at a dedicated, touch screen equipped computer. For trial purposes, you can use VicTouch without a touch screen monitor at any computer. Simply use your mouse to simulate screen touches.

**To start VicTouch at this computer, enter your Volgistics account number, login name, and password; and then click the Continue button.**

Account number:

Email address:

Password:

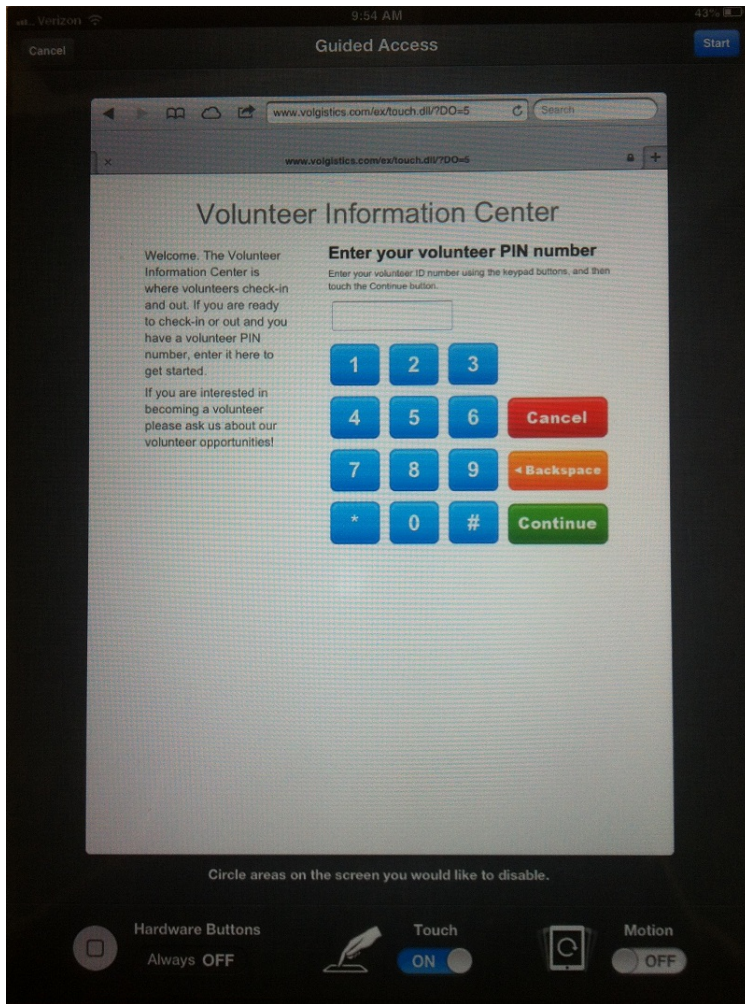
**Continue**

4. If the time zone displayed is correct, touch "Yes". If not, select "No" and choose the correct time zone
5. Touch the Continue button to finish launching VicTouch

Note that you are able to enter your full VicTouch URL in Safari, so that no login credentials are required. However, if you are using a device with a large screen, such as an iPad, the URL may be visible to users. Volunteers could potentially use the URL to launch VicTouch from other locations, such as their home computers. Therefore, this method is not recommended when launching VicTouch from a mobile device.

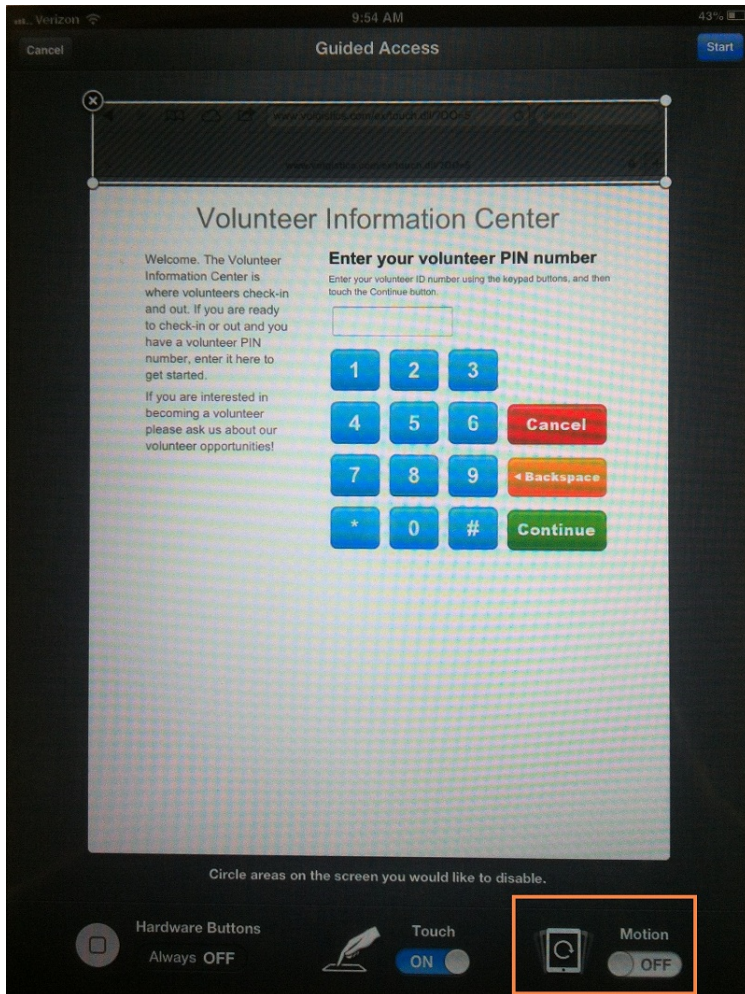
## Enabling Guided Access

1. With Safari open, and the VicTouch page displayed in the orientation you prefer (Portrait or Landscape), triple click the Home button (press it three times in rapid succession)

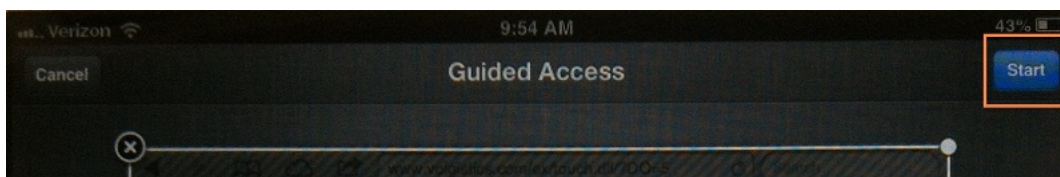


2. Now, circle areas of the screen you would like to "lock out". We recommend locking the areas containing the address and navigation options, as shown below.

3. Next to "Motion" move the slider to the "OFF" position. This will prevent users from changing the orientation, and getting around the locked out portions of the screen



4. Touch the "Start" button in the top right corner



Now, users will only be able to use Safari, and will not be able to navigate to another page. They will be locked into VicTouch.

#### Exiting VicTouch

To exit Guided Access and VicTouch:

1. Triple click the Home button
2. Enter your passcode for Guided Access
3. Touch "End"

Now, you can use your device normally. You can close the page with VicTouch, or exit Safari.

#### Problems Exiting VicTouch

Sometimes, Apple devices can become locked in Guided Access, preventing you from exiting VicTouch. You can correct this problem by performing a soft reset. Simply hold both the Home button and the Lock button until the Apple logo appears on the screen. The device will remain in Guided Access, but should allow you to enter your passcode and exit VicTouch.

**Related help**

[Help topic 3021 \[pg:1778\]](#) - VicTouch

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## Volunteer photos

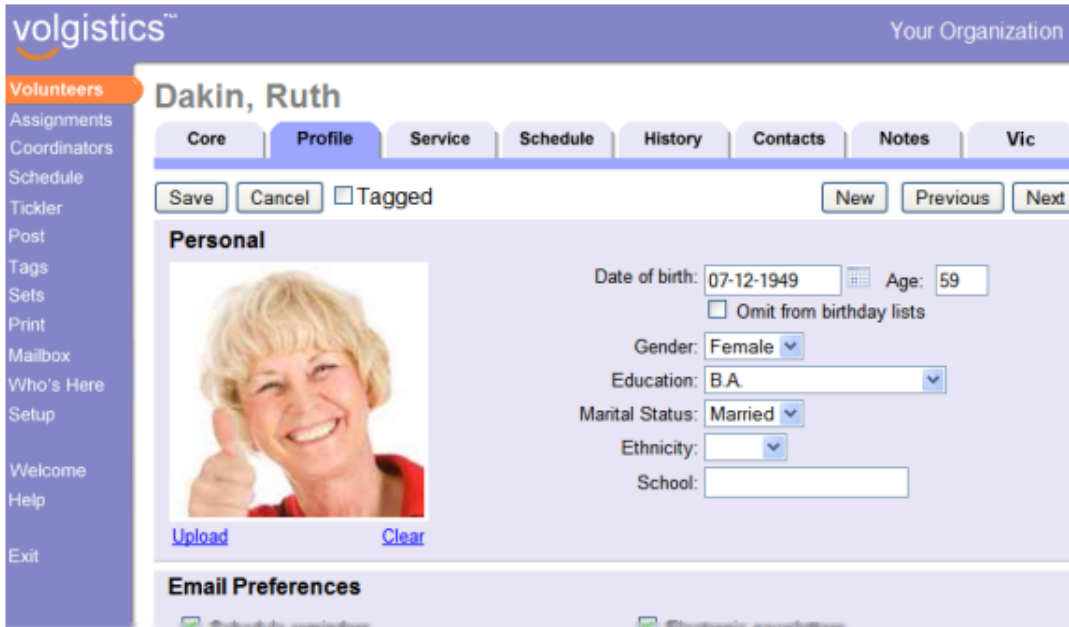
Help topic 1033

Added or revised 10-24-2011

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You can optionally store a photo of each volunteer in their volunteer record. You can upload volunteer photos yourself, and you can optionally allow volunteers and/or coordinators to upload their own photos through [VicNet \[pg:1724\]](#).

Volunteer photos appear on the Profile tab in each volunteer record if the Photo field is not hidden.



The screenshot shows the Volgistics interface for a volunteer's profile. The top navigation bar includes the Volgistics logo and "Your Organization". A left sidebar lists various menu items like "Volunteers", "Assignments", "Coordinators", etc. The main content area is titled "Dakin, Ruth" and has tabs for "Core", "Profile", "Service", "Schedule", "History", "Contacts", "Notes", and "Vic". The "Profile" tab is active. Below the tabs are buttons for "Save", "Cancel", "Tagged", "New", "Previous", and "Next". The "Personal" section features a photo of a woman giving a thumbs up, with "Upload" and "Clear" links below it. To the right of the photo are fields for "Date of birth" (07-12-1949), "Age" (59), "Omit from birthday lists" (checkbox), "Gender" (Female), "Education" (B.A.), "Marital Status" (Married), "Ethnicity", and "School". Below this is the "Email Preferences" section.

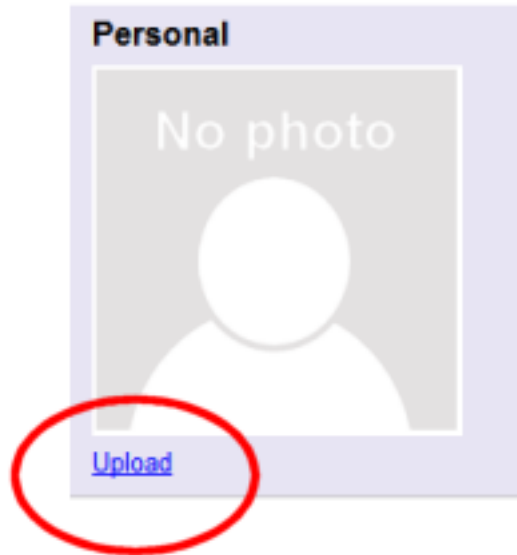
If you do not see volunteer photos when you view the Profile tab, photos are hidden for your system operator level, or the Photo field is hidden in your account. If you have access to the Setup page you can un-hide the photo field like this:

1. Choose Setup from the [menu \[pg:0215\]](#).
2. Select Field Options.
3. Select Profile tab (for volunteers).
4. Select Photo.
5. Change the Hidden drop-down to No.
6. Click the **Save** button.

### Uploading photos

You can upload volunteer photos from your computer or a memory card or digital camera you have attached to your computer. To upload a volunteer photo:

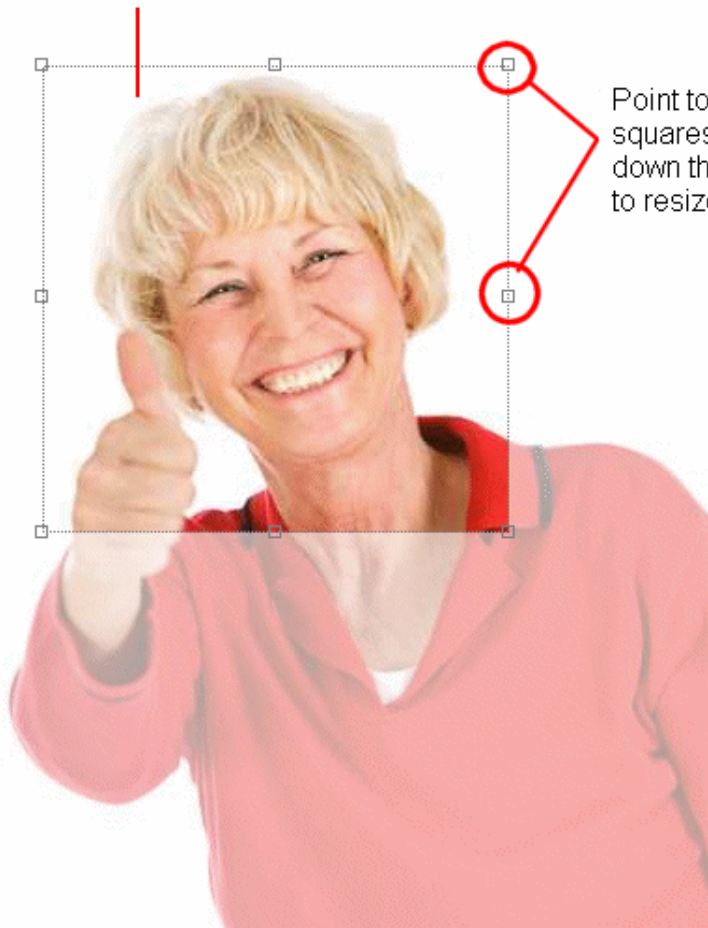
1. Choose Volunteers from the menu; locate the volunteer's record and then select the Profile tab.
2. Click the **Upload** link.



3. Click the Browse button and then select the photo file you want to upload. You can upload any image file in the ".gif," ".jpg," ".jpeg," or ".png" format, that is smaller than 10 megabytes (10,000K).
4. Once you've selected the photo file you want to upload click the **Upload** button. Depending on the size of the file you select, the upload may take a minute or more to complete. The 'Working...' message will go away once the file has been uploaded.
5. Crop the image. For consistency, Volgistics stores volunteer photos as square images. If the image you upload is rectangular, drag or resize the crop tool so it covers the portion of the image that includes the volunteer's face, as shown here:



Drag or stretch this crop tool so it covers the portion of the photo you want to upload



Point to any of these squares, and then hold down the mouse button to resize the crop tool

6. Click the **Submit** button. The uploaded image will now appear in the volunteer's record.

### **Remove a photo**

You can remove photos previously stored in a volunteer's record. When you remove a photo, the copy of the photo stored in the Volgistics system is deleted permanently. To remove a photo from a volunteer's record:

1. Choose **Volunteers** from the menu; locate the volunteer's record and then select the **Profile** tab.
2. Click the **Clear** link beneath the photo.
3. Click the **OK** button to confirm that it is okay to clear the photo.

### **Collecting volunteer photos through VicNet**

If you use the VicNet module you can give volunteers a way to view, and optionally upload or maintain their own photo. You can also allow coordinators to view and optionally upload photos of their volunteers.

To enable photos in VicNet for volunteers:

1. Choose Setup from the menu.
2. Select VicNet.
3. Select Profile tab (for volunteers).
4. Click the "Sections" link and then add a new "My Profile" tab section heading called *Photo* (or whatever you would like the section heading for the photo to be). You can optionally add any instructions you want volunteers to see in this section as well.
5. Click the **Save** button to save the new form section.
6. From the "VIC My Profile Tab" page click the "Photos" link.
7. Using the Form Section drop-down, select the form section you just created. Also choose if volunteers should be allowed to upload or clear their photos.
8. Click the **Save** button.

If you enable photos at VicNet, volunteers will see their photo on the "My Profile" tab. If you allow volunteers to upload their own photos, they upload photos using the same upload procedure explained above.

To enable photos in VicNet for Coordinators:

1. Choose Setup from the menu.
2. Select VicNet.
3. Select Volunteers tab (for coordinators).
4. Click the "Sections" link and then add a new "My Profile" tab section heading called *Photo* (or whatever you would like the section heading for the photo to be). You can optionally add any instructions you want Coordinators to see in this section as well.
5. Click the **Save** button to save the new form section.
6. From the "VIC Volunteers Tab" page click the "Photos" link.
7. Using the Form Section drop-down, select the form section you just created. Also choose if Coordinators should be allowed to upload or clear volunteer photos.
8. Click the **Save** button.

If you enable photos at VicNet for Coordinators, Coordinators will see volunteer photos on the "Volunteers" tab after they click on a volunteer's name. If you allow Coordinators to upload volunteer photos, they upload photos using the same upload procedure explained above.

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# Tracking Groups

Help topic 1045

Added or revised 04-28-2014

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Click on a link in the Content window below to be taken directly to that section of the Help topic.

## Content

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[Adding Group Records](#)

[Finding Group Records](#)

[Scheduling Groups](#)

[VicNet for Groups](#)

[Posting Service for Groups](#)

[Including or Excluding Group Records on Reports](#)

[Using Group Records with Checklist Items](#)

[Using Group Records with Awards](#)

## Introduction to Group Records

Many volunteer programs include both individual volunteers, as well as groups such as businesses; service clubs; and fraternal organizations that provide volunteer service. Volgistics gives you tools for tracking both kinds of volunteers: individuals and groups. This help topic explains the difference between Individual and Group records in Volgistics, and the features that are unique to Group records.

Each time you add a new volunteer record to Volgistics you can mark which kind of record it is: an Individual record or a Group record. You do this using the Kind field which appears in the Name box on the Core tab in each volunteer record.

The screenshot shows a form titled "Name" with several input fields. On the left side, there are fields for "Last name:", "First name:", "Middle name:", "Title:", and "Nickname:". On the right side, there are fields for "Number:", "Status:" (set to "Active"), "Type:", and "Kind:". The "Kind:" field has two radio buttons: "Individual" (which is selected) and "Group". A red circle is drawn around the "Kind:" field and its radio buttons.

Use Individual volunteer records when you want to track personal information (like name and address); volunteer service; Checklist items; or Awards for a person individually, or if you would like to include the individual in Volgistics emails and text messages.

Use Group volunteer records to track groups of people who serve collectively as part of a business; service or social club; fraternal organization; or similar group when you cannot or do not want to track the group's members individually. When you create a Group record, that single Group record will represent all of the members of that particular group. You can record the name and contact information for a group contact on each Group record; however you do not record the names of the individual members of the group in a Group record.

When entering service for a person who is a member of a Group, you will need to decide if the service applies to the Individual or the Group. To avoid double posting the service, be careful to exclude the person from the Group count and Group hours served if you decide to track the individual's service separately. If the service credit should be applied to the Group, do not also post the service to the Individual record.

Here are examples of when to track volunteers using Individual volunteer records and when to track volunteers using a Group record instead.

Nancy Wilson visits your organization one day to express her interest in becoming a volunteer. Nancy's neighbor is a volunteer, and what she's heard about your organization interests her. She's available to serve one day week. Nancy is clearly an individual volunteer and you would track her information in Volgistics using an Individual record.

Once a year your organization conducts a food drive for which hundreds of volunteers are needed to collect food items from homes in various neighborhoods throughout your community. No special volunteer screening is required, and a brief volunteer orientation is given to all volunteers who can help on the morning of the event. Peter Evans, President of the local Rotary Club contacts you and offers to participate. He tells you that his club will send twenty members on the day of the event. In this example it's not necessary for you to track these 20 volunteers individually. Instead, you create a single Group record for the Rotary Club in Volgistics, entering Peter Evans as the contact person for the group.

If you want to track the members of a group individually you can, however you should not create Group records for each group member you want to track individually. Use Individual volunteer records instead.

If you want to track the names – or any specific information such as service, Checklist items, or Awards – for each member of a group, you should track those volunteers using an Individual volunteer record for each person instead of creating a Group record for their group or a separate Group record for each group member. You can still link all of their records together [using a Flag \[pg:0212\]](#) if you want to be able to produce reports just for the volunteers who have a specific group association.

For example, an organization has 12 people who volunteer as part of their community's Retired Senior Volunteer Program (RSVP). Even though these volunteers are part of a group, the volunteer leader wants to be able to track the volunteer service for these people individually and give them awards individually. In this case the volunteer leader would track each of these RSVP members using an Individual volunteer record for each person instead of creating a Group record for "RSVP." The volunteer leader can then record volunteer service for these 12 volunteers just like they do for all other individual volunteers ( [manually \[pg:1569\]](#), or through [VicTouch \[pg:1778\]](#) or [VicNet \[pg:1724\]](#) ).

Once a month, the volunteer leader must send the RSVP office a report that shows the number of volunteer hours served by these 12 RSVP volunteers. The volunteer leader can accomplish this simply by adding an "RSVP" flag to the Flag field in each of these 12 Individual volunteer records. Then at the end of each month they run a Service Details report that includes only the volunteers who have the "RSVP" flag (they can even setup this report so it [runs automatically \[pg:0473\]](#) at the end of each month!).

Group volunteer records differ from Individual volunteer records several ways. The differences between Group and Individual records are explained next.

### **Adding Group Records**

To add a new Group record manually:

1. Choose Volunteers from the menu.

2. Click the **New volunteer** button.
3. Enter the name of the group's contact person in the Name box.
4. Check "Group" in the Kind field.

**Contact Name**

Last name:  Number:

First name:  Status:

Middle name:  Title:

Nickname:  Kind:  Individual  Group

Once you select Group in the Kind field, a new box appears for entering the group's information.

**Group**

Group name:

Members:  (How many members in this group?)

Participation: If this group serves more than once, they usually send:

The same volunteers each time

Different volunteers each time

Enter the following information about the group.

#### Group name

Enter the group name.

#### Members

If you know how many members this group has, enter the number of people who belong to this group in the Members field. For example, if the Downtown Rotary Club has 50 members, enter 50 here (even if not all 50 members will volunteer). You can leave this field zero if you're not sure how many members the group has.

#### Participation

Choose the option that you think best describes how this group will participate if they will volunteer more than once for your organization. Volgistics uses this information when it calculates **unduplicated volunteer counts** [pg:0452] on service reports.

Choose **The same volunteers each time** if the group will typically send the same people each time the group volunteers. For example, if ten students from a college sorority serve once a month, and it tends to be same ten students each time, choose "The same volunteers each time. "

Choose **Different volunteers each time** if the group will typically send different people each time the group volunteers. For example, if ten employees from a large corporation located in your community serve once a month, and it tends to always be a different 10 people each time, choose "Different volunteers each time."

## Address

Enter the address and contact information for the group contact person in the Address box.

5. Click the **Save** button save the new group record.

## Icons

Groups and Individuals appear with different icons to help you distinguish Group records from Individual records.

 - Individual

 - Group

## Finding Group Records

Once you've added Group records to your database, you can later find and retrieve these records by the group contact's name or by the group name.

To find by the group contact's name:

1. Choose Volunteers from the menu.
2. Enter the contact person's last name in the Last Name field.
3. Click the Go button to see the volunteers with that last name.
4. Click the contact person's name.

To find by the group name:

1. Choose Volunteers from the menu.
2. Enter the group name in the Group Name field (or you can just enter the first few letters of the group name here).
3. Click the Go button to see the Group volunteers that match your entry.
4. Click on the appropriate group record.

## Scheduling Groups

You can schedule group volunteers along with individual volunteers in Volgistics.

When you add a group to a schedule from the Schedule tab of the Group's record, you'll see an additional Volunteers field you can use to record the number of group members who are to be scheduled. This makes it possible for you to schedule multiple group members in a single step.

[Help topic 1197 - Scheduling groups \[pg:0753\]](#) explains more about group scheduling.

## VicNet for Groups

If you use VicNet, group contacts can use VicNet to self-schedule their group members, as well as to post volunteer hours for their group online.

Since you do not track the individual group members when you use Group records, Volgistics does not provide a way for each separate member of group to access their group's records through VicNet.

There are not currently any VicTouch features designed specifically for group contacts or group members.

[Help topic 1198 - Using VicNet for groups \[pg:1673\]](#) explains more about the unique features of VicNet for Group records.

## Posting Service for Groups

You can post hours and other service for groups [manually from individual group records \[pg:1569\]](#), from the [Post page for multiple records \[pg:1559\]](#), or the group contact can [post hours for their group online \[pg:1673\]](#) using the [VicNet \[pg:1724\]](#) option.

When you or the group contact post hours for a group, a

### *Volunteers*

field appears on the service record. Use the Volunteers field to enter the number of group members who participated in the volunteer service you're posting. Volgistics uses this group volunteer count when it calculates [unduplicated volunteer counts \[pg:0452\]](#) in reports.

If you choose to post the starting and ending times that volunteers serve when you post volunteer hours, Volgistics will calculate the total hours served by the group automatically based on what you enter in the Volunteers field. For example, if 10 members of a group all worked from 9:00 am to 11:00 am, your service entry would look like this:

The screenshot shows a web form titled "Service" with an "Add" button. The form contains the following fields and values:

- Assignment: Phone Bank (dropdown menu)
- From date: 02-20-2011 (calendar icon)
- To date: 02-20-2011 (calendar icon)
- From time: 9:00 am (time and AM/PM dropdown)
- To time: 11:00 am (time and AM/PM dropdown)
- Hours: 20:00
- Volunteers: 10 (circled in red)

Below the "Volunteers" field is the text: "(Number of group members who served these times)". At the bottom right of the form are "Save" and "Cancel" buttons.

The Hours field will automatically show 20:00 hours served (2 hours each for 10 volunteers).

If you do not post the starting and ending times when you post volunteer hours, you will need to enter the total number of hours served collectively by the group, and then enter the number of group members who participated in that service in the Volunteers field. For example, if a group served 50 hours altogether, and there were 16 group members who each served a portion of those hours, your service entry would look like this:

**Service**

**Add**

Assignment: Phone Bank

Date: 02-21-2011

Hours: 50:00

Volunteers: 16 (Number of group members who participated in this service)

Save Cancel

You control if starting and ending times are available for posting service with your account's [settings for service tracking \[pg:1429\]](#).

If your organization uses the [VicTouch \[pg:1778\]](#) module, the group's leader can also sign-in and out when they arrive and depart from your facility. With this option, the total for the group's service will be calculated automatically. [Help topic 1212 \[pg:1759\]](#) explains more about this option.

### Including or Excluding Group Records on Reports

When you print [stock \[pg:0595\]](#) or [custom \[pg:0467\]](#) reports in Volgistics there may be times when you want a particular report to exclude Group records, include only Group records, or include both individual and Group records. You can do this by checking the appropriate option on the Include tab for the report.

For example, if you wanted to modify a custom Volunteer List report so it includes both individual and Group records, you would do this by:

1. Choose Print from the menu.
2. Click Volunteer list to expand your Volunteer list reports.
3. Click on the name of the report you want to modify.
4. Click the **Modify it** button.
5. Select the Include tab.
6. Under "Which volunteers do you want to include in this report?" find the Kind heading and be sure the "Both individuals and groups" option is checked as shown here.



Which **volunteers** do you want to include in this report?

Tagged volunteers ( 0)

These volunteers:

**Status**

Any

Any of these

Active  Applicant  Inactive

LOA  Prospect

**Type**

Any

Any of these

Adult  College  Group

High School

**Kind**

Both individuals and groups

Individuals only

Groups only

**Flags**

Any

Any of these

7. Save or print the report.

### Using Group Records with Checklist Items

If you use the volunteer [Checklist \[pg:0142\]](#) features, you may have some Checklist items that should apply to both Group and individual records, or apply only to Group or individual records. Here is an example of how to setup a Checklist item to only apply to individual volunteers:

1. Choose [Setup \[pg:0887\]](#) from the menu.
2. Click Checklists.
3. Click on the name of a Checklist item you want to change, or click the "Add a new Checklist item" link to create a new Checklist item.
4. Under "Which volunteers should this item apply to?" select "Individuals only" in the "If their Kind is" section.

Which volunteers should this item apply to?

If their Status is:

- Active
- Applicant
- Inactive
- LOA
- Prospect

If their Kind is:

- Either individual or group
- Individuals only
- Groups only

If their Type  is  is not:

5. Finish configuring the Checklist item and then click the **Save** button.

Remember that Group records represent groups of volunteers who you do not track individually. For this reason there is not a way to use Checklist items to track whether or not specific members of a group have completed a Checklist item. If you setup a Checklist item that applies to Groups, you can use the Checklist in each Group record to show whether or not the group contact completed that item.

### Using Group Records with Awards

If you use Volgistics to track and queue volunteer [awards \[pg:1551\]](#), you may have some Awards that should not apply to Group records, should apply only to Group records, or should apply to both individual and Group records. Here is an example of how to setup an Award to only apply to Group records.

1. Choose [Setup \[pg:0887\]](#) from the menu.
2. Click Awards.
3. Click on the name of an Award item you want to change, or click the "Add a new award" link to create a new award.
4. Under "Volunteers receive this award only if, select "Groups only" in the "Their Kind is" section.

Volunteers receive this award only if...

Their Type  is  is not:

Their Flag  is  is not:

Their Kind is:

- Either individual or group
- Individuals only
- Groups only

Sequence:

Some awards are sequential, such as those based on 100, 500 and 1,000 hours of service. If this award

5. Finish configuring the award and then click the **Save** button.

Keep in mind that Group records represent groups of volunteers who you do not track individually. For this reason there is not a way to queue or track awards for specific members of a group who serve under a Group record. If you want to track awards for group members individually you can track those volunteers as Individuals instead of tracking them collectively as a Group.

If you setup an Award that applies to Groups, a Group will be queued for the award when the group members collectively meet the award requirements. For example, if you create an award which is given after 100 hours of service, the Group will be queued for the award if 50 members of the group each serve 2 hours.

Remember that when you have an Individual record for someone that is also a member of a Group, you will need to decide if the service applies to the Individual, the Group or both. If you want to avoid double posting the service, be careful to exclude the person from the Group count and Group hours served if you decide to track the individual's service separately. If the service credit should be applied to the Group, do not also post the service to the Individual record. You can link the individuals to the Group later by using a Flag as discussed in the sidebar on this page.

### Related help

[Help Topic 1990 \[pg:1816\]](#) - Tracking Multiple Contacts for a Group

[Help Topic 1197 \[pg:0753\]](#) - Scheduling groups

[Help Topic 1198 \[pg:1673\]](#) - Using VicNet for groups

[Help Topic 1205 \[pg:0756\]](#) - Schedule Icons

[Help Topic 1212 \[pg:1759\]](#) - Using VicTouch for groups

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## VIC Tab

Help topic 1076

Added or revised 01-24-2017

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The Vic tab has access information for the optional [VicNet \[pg:1724\]](#) or [VicTouch \[pg:1778\]](#) components. This tab appears on volunteer and [Coordinator \[pg:0163\]](#) records even if these modules are not included in your organization's service level. This allows you to try the modules on a [trial basis \[pg:0082\]](#).

You use the Vic tab to:

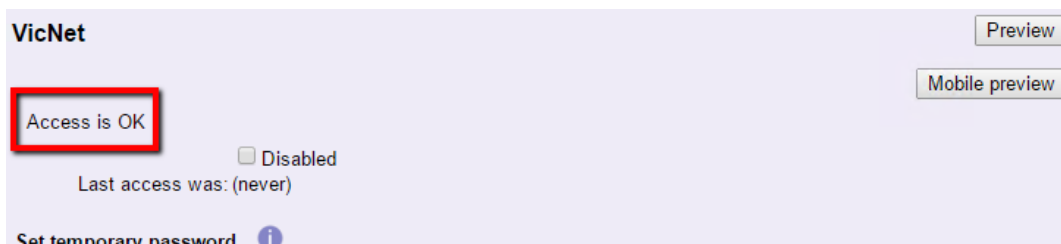
- Check or change a volunteer or Coordinator's ability to access the optional modules
- Preview VicNet from the perspective of a volunteer or Coordinator
- Set a temporary VicNet password for a volunteer or Coordinator
- Send a volunteer or Coordinator a link to set her password
- See dates volunteers viewed VicTouch [Greeting Cards \[pg:1776\]](#)
- Change a volunteer's privacy options

### VicNet Access

The VicNet box at the top has a variety of purposes. The first is showing the volunteer or Coordinator's ability to access VicNet.

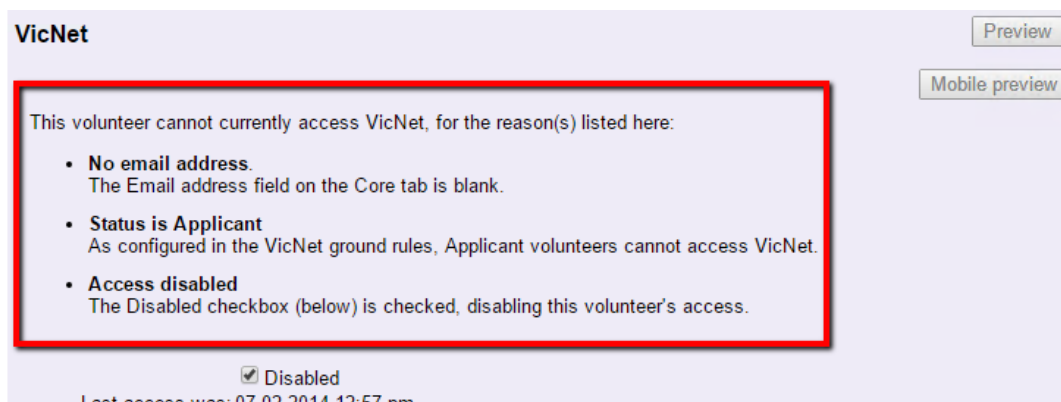
#### Access is OK

*Access is OK* means that this volunteer or Coordinator has an email address and their access to VicNet has not been disabled by you. Also in the case of volunteers, their volunteer Status is one that is allowed to access VicNet.



This volunteer (Coordinator) cannot currently access VicNet, for the reason(s) listed here

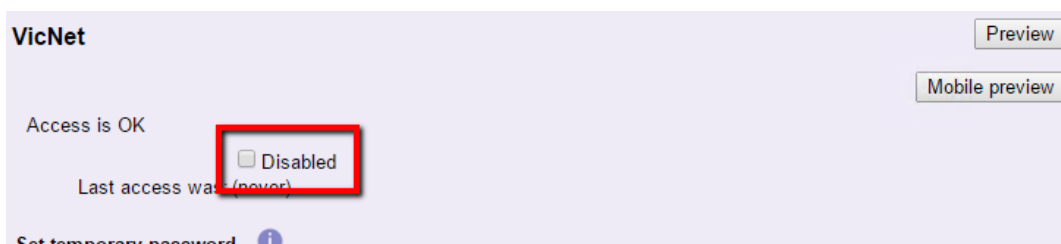
If access is not OK, you'll see this message and the reason(s) this volunteer or Coordinator cannot currently login to VicNet. If you would like this volunteer or Coordinator to be able to use VicNet, simply correct the conditions listed in this area.



### Access disabled

Check the *Disabled* checkbox and then click the **Save** button if you want to prevent this volunteer or Coordinator from being able to login to VicNet.

Un-check this box and click the **Save** button to permit this volunteer or Coordinator to access VicNet.

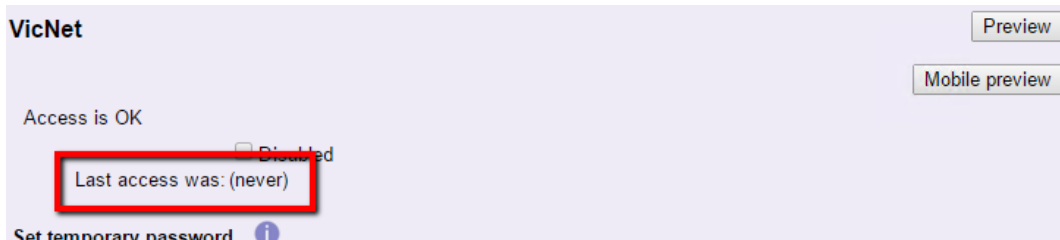


### Last access was

This field shows the date and time this volunteer or Coordinator last accessed VicNet:



If the volunteer or Coordinator has never accessed VicNet, this field will show *(never)*:



### Hint:

If you want to see the last date all your volunteers accessed VicNet, you can add the *Last access was* date to the list you see when you select Volunteers from the [menu \[pg:0215\]](#). You can find information on how to do this in [help topic 1202 \[pg:1381\]](#).

### Preview VicNet

Another thing you can do in the VicNet box is preview VicNet as the volunteer or Coordinator. To do this, simply click the **Preview** or **Mobile preview** button.



This will open the person's VicNet account in a new browser window. You can learn more about previewing records in [help topic 2159 \[pg:1705\]](#).

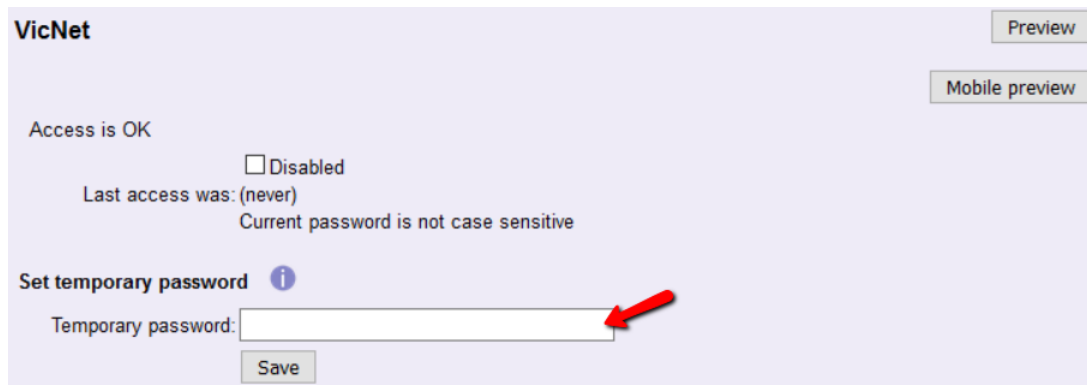
### VicNet Passwords

Finally, the VicNet box also allows you to set a temporary password for the volunteer or Coordinator, or send the volunteer or Coordinator a link she can use to set a password. For security purposes, Volgistics never displays the password currently established for a volunteer or Coordinator

### Set temporary password

There is not a way to send the volunteers their temporary password by email or text. So this option should only be used when you have some other way to communicate the temporary password to the volunteer or Coordinator.

To assign a temporary password, enter a password in the *Temporary password* field and then click the **Save** button. Because the volunteer or Coordinator will need to select a permanent password, the temporary password does not need to meet any password strength requirements setup for your account.



The screenshot shows the VicNet user interface. At the top left is the 'VicNet' logo. On the top right are 'Preview' and 'Mobile preview' buttons. Below the logo, it says 'Access is OK' and 'Last access was: (never)'. There is a checkbox for 'Disabled' which is unchecked, and a note that 'Current password is not case sensitive'. The 'Set temporary password' section has an information icon (i) and a text input field labeled 'Temporary password:'. A red arrow points to this input field. Below the input field is a 'Save' button.

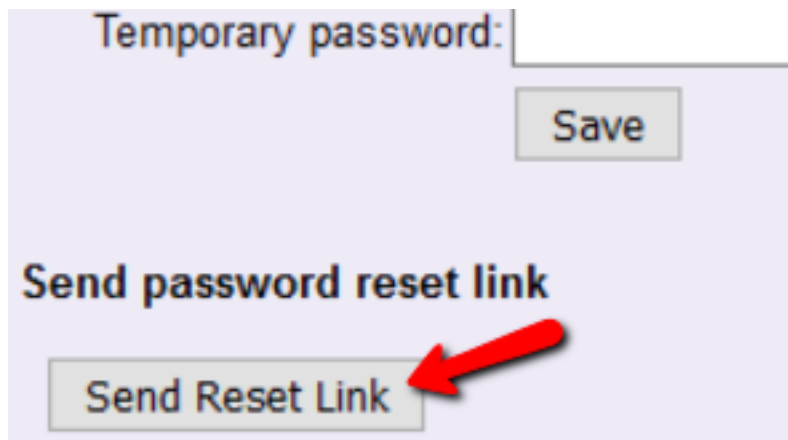
### **Please note:**

Setting a temporary password does not replace the person's current password if they have one. If the person remembers their current password, it will still work. If the person logs in with the temporary password, they will need to change the temporary password to a permanent password before they can work in VicNet.

### Send password reset link

You can send a link by email to the volunteer or Coordinator that can be used by her to set a VicNet password. If the Coordinator or volunteer has [opted-in to text messaging \[pg:0323\]](#), the password will also be sent by text message. The link will only stay active for 24 hours after you send it. If volunteers or Coordinators report that they click the link and it has expired, simply have them click the *Forget your password?* or *Need a password?* link on the VicNet login page. This will send out a new link to the person.

To send the message with the link, click the **Send Reset Link** button:



The screenshot shows a close-up of the 'Send password reset link' section. At the top, there is a text input field labeled 'Temporary password:' and a 'Save' button. Below this, the text 'Send password reset link' is displayed in a larger font. At the bottom, there is a button labeled 'Send Reset Link'. A red arrow points to this button.

## **VicTouch**

*There is not a way for Coordinators [pg:0163] to access VicTouch [pg:1778] so this section will not appear on the Vic tab for Coordinator records.*

### Access is OK

*Access is OK* means that the volunteer's access has not been disabled by you and their volunteer **Status [pg:1832]** is one that is allowed to access VicTouch. You control which Status(es) volunteers must have to access VicTouch on the **VicTouch Ground Rules [pg:1511]** page.

This volunteer cannot currently access VicTouch, for the reason(s) listed here:

You'll see the reason(s) this volunteer cannot currently login to VicTouch listed here. If you would like this volunteer to be able to use VicTouch, simply correct the conditions listed in this area.

### PIN number is

The VicTouch box also contains the PIN associated with that volunteer. This number, also found in the Number field on the Core tab, is what a volunteer should enter to login at VicTouch. Help topics **2152 [pg:1856]** and **2247 [pg:1015]** have information on how this number is assigned and how to change the settings.

### Greeting Card Status

If you have used the **Greeting Cards [pg:1776]** at VicTouch, this section of the VicTouch box will tell you whether cards have been used and/or delivered to the volunteer.

## **Privacy**

This box allows you to customize a volunteer's privacy settings on the VicNet and VicTouch schedules. *There is not a way for Coordinators [pg:0163] to appear on the schedule so this section will not appear on the Vic tab for Coordinator records.*

### Allow other volunteers to see when I am scheduled.

If this box is checked, the volunteer's name will be included on the schedule at VicNet and VicTouch when the schedule is setup to allow volunteers to see who else is scheduled. If the schedule is not configured to allow volunteers to view the other volunteers scheduled, marking this box will not have an effect. The settings for this are found on the **VIC My Schedule Setup Page [pg:1453]**.

If this box is unmarked, other volunteers will not be able to see this volunteer's name when looking at the schedule in VicNet or VicTouch--even if the schedule is setup to allow volunteers to see who else is scheduled. In place of this volunteer's name, it will say "Filled" next to the opening for which they are scheduled.

---

## How can I get a volunteer count?

Help topic 1173

Added or revised 02-14-2012

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Volunteer managers sometimes need to see the total number of volunteers in their organization or the total number of volunteers with certain characteristics. This help topic provides several options for obtaining volunteer counts in Volgistics.

### To see the number of volunteers

There is a count at the bottom of the Volunteers page. You can use this in combination with the Include options on the Volunteers page to get counts for different kinds of volunteers. Note that by clicking the "Advanced options" button, the user can select which volunteers are displayed by even more criteria.

In the example below, only Active Adult volunteers with the RSVP Flag will be displayed when the user clicks the "All" link at the top of the page.

### 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](#)

#### Include

Status:    
Type:    
Flag:    
Site:    
Set:    
Tags:    
[↑ Clear](#)

#### Find

Last Name:    
First Name:    
Number:    
Email:

The screen generated from these selections includes a volunteer count at the bottom. As seen below, four volunteers met the criteria entered on the Volunteers page.



## 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](#)

 [Email](#)

Name	Tag	Street	City	State
<a href="#">Howard, Ernie</a>	<input type="checkbox"/>	8712 Oak Street Apartment 12	Mt. Pilot	IN
<a href="#">McMurphy, Ernie</a>	<input type="checkbox"/>	1203 Second Street	North Bedford	IN
<a href="#">Rogers, Laura</a>	<input type="checkbox"/>	317 Kirkwood Apt 42	Bedford Falls	IN
<a href="#">Wilson, Nancy</a>	<input type="checkbox"/>	812 1st Street Apt 56	Bedford Falls	IN

4 volunteers listed

[New volunteer](#)



[Tag these](#)

[Un-tag these](#)

[Top](#)

### To obtain a printed list with a count

Sometimes there is a need to not only view a volunteer count, but to include it in a printed report. Here are three ways to do so:

1. The Volunteer List report contains an option to "Include a volunteer count." Selecting this item on the report's Options page will add a count of all listed volunteers to the bottom of the report. By choosing which volunteers you want to include in the list report on its Include page, you can generate lists and counts of specific groups of volunteers on the report.
2. If you want a count of the number of volunteers who performed service, both Service Details and Service Summary reports can include an [unduplicated count \[pg:0452\]](#) of the volunteers who had service during the time period included in the report. You choose to include the unduplicated volunteer count on a service report's Fields page.

---

## Tracking Multiple Contacts for a Group

Help topic 1990

Added or revised 10-25-2012

---

Use the [Core tab \[pg:1868\]](#) in the group record to store each group's main contact person's information. When you print address labels or address lists, Volgistics uses the address on the Core tab as the group's mailing address. Also, email messages are sent to the address stored on the Core tab. If a group has secondary contacts, you can store their information on the Contacts tab of the group's record for reference purposes.

The first step to do this is to add a Contact Kind field entry for tracking an additional group contact. If you have not done this already, here is how to add the entry:

1. Choose Setup from the [menu \[pg:0215\]](#).
2. Select 'Field Options.'
3. Select 'Contacts tab.'
4. Click the Kind link.

5. On the Field Properties page, enter the new kind (e.g. "Secondary Group Contact") in the 'Add a new item' field.

6. Click the **Save** button.

After you have made the new Contact Kind, you can add additional contacts for your group record by:

1. Choose Volunteers from the [menu \[pg:0215\]](#).

2. Open the record for the group you want to add additional contacts information on.

3. Click the Contacts tab.

4. Click the **Add a new contact** button.

5. Select the Contact Kind you created from the Kind field dropdown list.

## Bailey, George (Savings and Loan Volunteers)

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

Add a new contact  Tagged New Previous Next

**Secondary Group Contact**

Last name:  Kind: **Secondary Group Contact** ▼

First name:  Relationship:

Middle name:  Title:  Contacted:

Nickname:  Verified:

6. Enter the information for the secondary contact.

7. Click the **Save** button.

---

## Finding Archived Volunteer Records

Help topic 1998

Added or revised 10-22-2012

---

In Volgistics, your account is divided into two sections--the non-archived records and the archived records. Archived records have more limited functionality compared with non-archived records and each section is used for different purposes. [Help topic 1999 \[pg:0709\]](#) explains more.

There are times when you may need to locate a record that has been archived. To do this:

1. Choose Volunteers from the menu.

2. Click the "Advanced options" button under the "Include" section.

3. Check the box next to "Archived Volunteers".

4. Click the "All" link near the top of the Volunteers page to see all of your archived records. If you're looking for a specific record and know the volunteer's name, you can also click on the link for whatever letter starts the volunteer's last name or use the "Find" options to locate the record.

#### Related help

[Help Topic 1997 \[pg:0442\]](#) - Including Archived Records on Reports

[Help Topic 1999 \[pg:0709\]](#) - Archived Versus Non-archived Records

[Help Topic 2000 \[pg:1819\]](#) - Archiving Volunteer Records

[Help Topic 2027 \[pg:0719\]](#) - Service Levels

---

## Archiving Volunteer Records

Help topic 2000

Added or revised 10-05-2016

---

Volgistics includes an archive for storing old volunteer records that you don't currently need in the database, but you don't want to delete altogether. For instance, you might choose to archive the record for a volunteer who has moved away. If the volunteer returns, you can easily restore their record. If you do not mind accumulating records for inactive volunteers, then you do not need to archive volunteer records. However, most people like to maintain only the records they really need.

When you archive a volunteer record, Volgistics moves all information tied to the record into the archive. You may restore archived volunteer records at any time. When you restore a volunteer from the archive, all information except for the volunteer's schedule comes back. The schedule is not restored along with the record because, in many cases, the volunteer's former schedule has been taken over by another volunteer since the volunteer record was archived.

*When you archive a volunteer record it is, in effect, removed from the database and moved into a storage area. While the record is archived you cannot access or use the record the same way that you can use volunteer records you have not archived.*

- When you archive a volunteer's record, their volunteer information will no longer appear in any Volgistics reports, with the following exceptions: [volunteer service \[pg:1581\]](#) will always appear on [Service Detail \[pg:0560\]](#) and [Service Summary \[pg:0580\]](#) reports even for volunteer records that have been archived. This means that you can always count on

*Service Detail*

and

*Service Summary*

reports to include volunteer service even if the volunteer's record has been archived. Information from archived volunteer records can optionally be included in [Statistics \[pg:0593\]](#) reports. Archived volunteer records can also be exported using the [Excel spreadsheet \[pg:0513\]](#) reports. You can find more information on including information for archived records in these reports [here \[pg:0442\]](#). There is not a way to include archived volunteer records on other reports.

- When you archive a volunteer record, the volunteer is removed from any schedules they may have been on.
- Archived volunteers cannot use [VicNet \[pg:1724\]](#) or [VicTouch \[pg:1778\]](#).
- Archived volunteers cannot receive [email \[pg:0404\]](#), [text \[pg:0343\]](#) or [Vic Mail \[pg:0315\]](#) messages sent through Volgistics.
- Birthdays for archived volunteers do not appear on the [birthday list \[pg:1385\]](#).

You should not archive a volunteer record if you want to include that volunteer in any of the functions listed above.

[When to archive volunteer records](#)

There is not a hard and fast rule for when you should archive volunteer records for inactive volunteers. Since the [Service Detail \[pg:0560\]](#), [Service Summary \[pg:0580\]](#) and [Statistics \[pg:0593\]](#) reports can include [service data \[pg:1581\]](#) from archived records, you do not have to wait until year end service reports are complete to archive volunteer records. Keep in mind, however, that if there is still a possibility that past hour entries will need to be made for a newly inactive volunteer, you should not archive their record until those entries have been made. A good rule-of-thumb might be to archive inactive volunteer records quarterly or semi-annually. [Help topic 2222 \[pg:0878\]](#) "Find the Volunteers with No Recent Activity" shows how you can find the volunteers who have not had any service entries recorded on their record recently.

How to archive an individual volunteer record:

1. Select *Volunteers* from the [menu \[pg:0215\]](#), and then click on the letter of the alphabet that corresponds to the volunteer's last name. The corresponding list of volunteer names appears.
2. Click on the volunteer's name. The [Core tab \[pg:1868\]](#) opens.
3. In Volgistics, the [Status \[pg:1832\]](#) shows the volunteer's relationship with your organization. Volgistics does not automatically change a volunteer's Status when the record is archived so an archived record can have any Status. If you rely on Statuses to track volunteers, it is a good practice to change the Status on the record before archiving it.
4. Click the **Archive** button. A system prompt appears to confirm that it is okay to archive this volunteer record. ([What if I don't have an Archive button? \[pg:1605\]](#))
5. If you are certain that this is a record you would like to archive, click the **OK** button.

Volgistics moves the entire volunteer record into the archives--except for the volunteer's schedule, which is deleted. When the process is finished, Volgistics displays the initial Volunteers screen.

How to archive multiple volunteer records:

1. Before you begin, select *Tags* from the menu and click the **Clear all tags** button to make sure your session does not have any records that are currently tagged. Doing this will prevent records from being archived by accident. If the **Clear all tags** button is disabled, there are not any tagged records to clear.
2. Tag the volunteer records that you want to archive. If you need help with this, see [help topic 2139 \[pg:1538\]](#).
3. Select *Tags* from the menu.
4. In Volgistics, the volunteer [Status \[pg:1832\]](#) shows the volunteer's relationship with your organization. Volgistics does not automatically change volunteer Statuses when records are archived so an archived record can have any Status. If you rely on Statuses to track volunteers, it is a good practice to change the Status on the records before archiving them. You can do this for all of the tagged records by selected the desired Status from the dropdown in the *Change the **Status** of all tagged records to* section and then clicking the **Go** button.
5. Click the

**Go**

button located next to

**Archive**

*the tagged volunteer records*

. A system prompt appears to confirm that it is okay to archive the tagged volunteers. ([What if I can't complete this step? \[pg:1605\]](#))

6. If you are certain you would like to archive the tagged records, click the **OK** button.

How to view the archived volunteer records:

1. Select *Volunteers* from the **menu** [pg:0215].
2. Click the **Advanced options** button if the Advanced page is not already displayed.
3. Check the *Archived volunteers* checkbox. This changes your view of the volunteer records so you see just the archived volunteers. The page title changes to Archived Volunteers to let you know you're viewing the archives.
4. Use the letters of the alphabet or the *All* link to locate a specific archived volunteer record.

When you're finished working with the archived volunteer records, un-check the *Archived volunteers* checkbox on the Volunteers page to return to the non-archived records. You can also click the **Basic options** button to return to the basic page.

How to un-archive a volunteer record:

1. View the archived volunteer records as explained above.
2. Locate the archived volunteer record you want to restore.
3. Select the record and the **Core tab** [pg:1868] appears.
4. Click the **Restore** button to restore the record.
5. If you changed the volunteer's **Status** [pg:1832] to one that represents an archived volunteer, return it to a different Status if appropriate.

*If you wish to restore all of your archived volunteers at once, see **help topic 2038** [pg:0889].*

### **Related help**

[Help Topic 1997 \[pg:0442\]](#) - Including Archived Records on Reports

[Help Topic 1998 \[pg:1817\]](#) - Finding Archived Records

[Help Topic 1999 \[pg:0709\]](#) - Archived Versus Non-archived Records

[Help Topic 2001 \[pg:1822\]](#) - Delete Archived Volunteer Records

[Help Topic 2014 \[pg:1832\]](#) - Tracking Volunteer Status

[Help Topic 2034 \[pg:1852\]](#) - How do I restore a volunteer record from the archive?

[Help Topic 2137 \[pg:1530\]](#) - Working with Tags

[Help Topic 2175 \[pg:1605\]](#) - Why don't I see the "Archive" button?

[Help Topic 2222 \[pg:0878\]](#) - Find the Volunteers with No Recent Activity

[Help Topic 2330 \[pg:1893\]](#) - How to Handle Volunteer Records for Deceased Volunteers

### **Related Videos**

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## Delete Archived Volunteer Records

Help topic 2001

Added or revised 01-07-2016

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You can delete archived volunteer records individually or in groups. You will normally only delete archived records if you discover duplicates, or if you decide that there is no need to maintain the record(s) in the archives any longer.

**Deleted archived records can only be restored for 5 calendar days after they are deleted.** If 5 days pass and the record has not been restored, it will be permanently deleted from the system. There is not a way to "un-do" the deletion at this point.

You can find information on how to restore a deleted record during the 5 day hold period in [help topic 2311 \[pg:1888\]](#). Please note, that there is not a way to restore the schedule for a volunteer that has been deleted. All schedule information for the record will be lost.

There may be instances where you need to permanently delete a record before the 5 calendar day hold period ends. If you need to do this, see the [Remove a deleted archived record before the 5 day hold period ends](#) section at the bottom of this help topic.

When you delete an archived volunteer record, all of the data related to that volunteer – including their service records – are completely deleted from your database. You should not delete archived volunteer records for volunteers who have service records for the current calendar or [fiscal year \[pg:0062\]](#) if you want to include their service on year end service reports.

**Tip:** If you want to save the data from archived volunteer records before you delete them, you can use an [Excel spread sheet \[pg:0513\]](#) report to save the archived volunteer records to your own computer before you delete them. [Help topic 1997 \[pg:0442\]](#) has more information on this.

Click a link in the *Contents* box below to go to a specific section of the help topic.

### Contents

Delete a single archived volunteer record

Delete groups of archived volunteer records

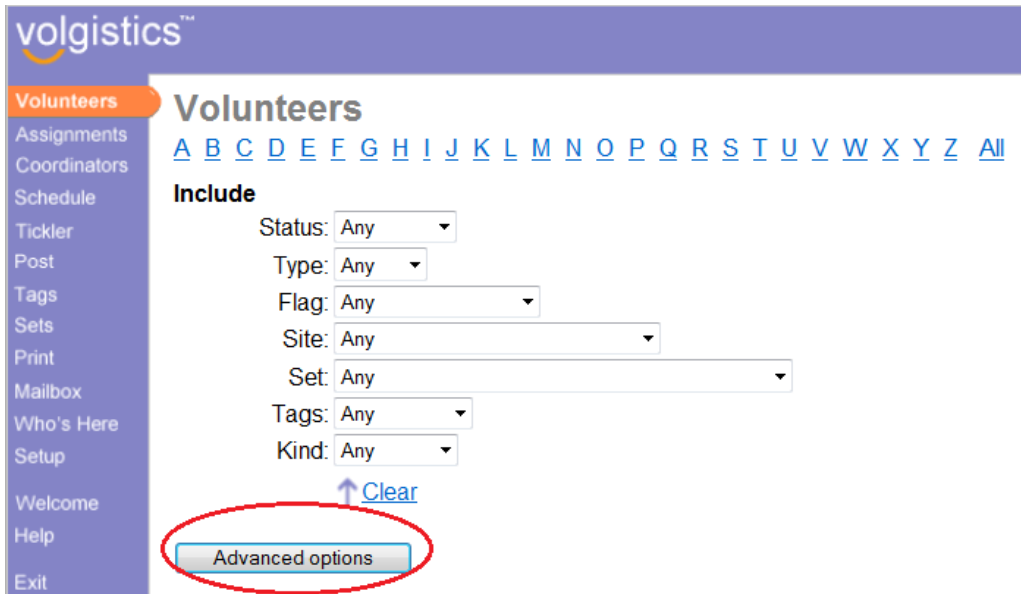
Choosing which archived records to delete

Remove a deleted archived record before the 5 day hold period ends

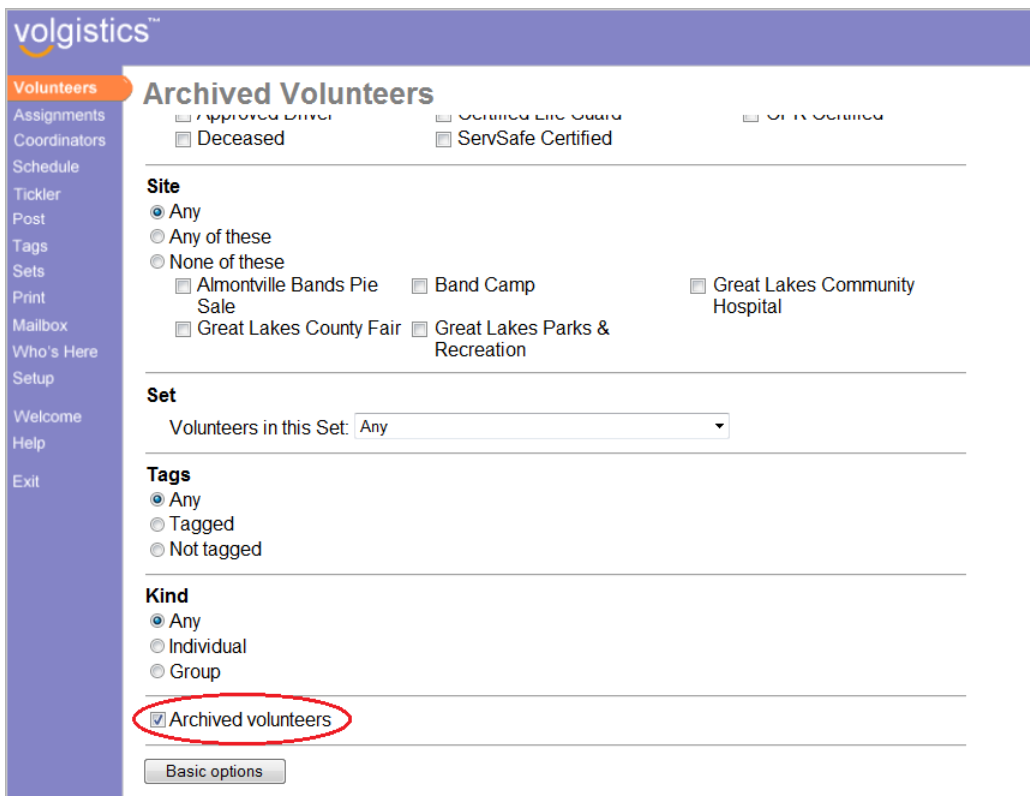
### Delete a single archived volunteer record

To delete a single archived volunteer record:

1. Choose Volunteers from the [menu \[pg:0215\]](#). The initial Volunteers screen appears.
2. If the Advanced Include options are not already displayed, click the **Advanced options** button.



3. Check the *Archived volunteers* checkbox in the Include options. The list of volunteers will include only the archived volunteers.

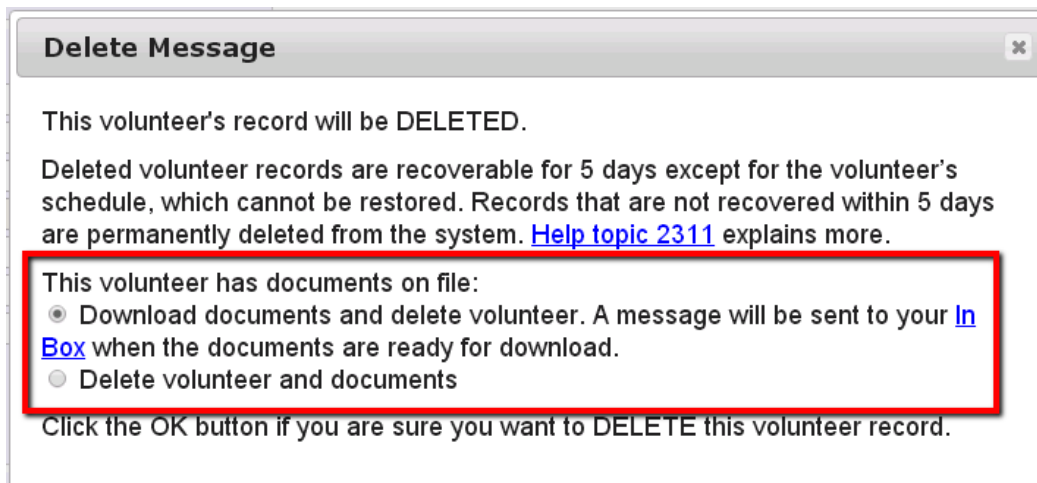


4. Use the letters at the top of the Volunteers screen, or the All link, and select the volunteer record you would like to delete.

5. Click the **Delete** button on the **Core tab** [pg:1868] of the record. A prompt will appear to confirm that you'd like to delete the record.



6. If your account has the [VicDocs \[pg:1648\]](#) feature enabled, and the record you're deleting has documents stored, the prompt will include an option to save or delete the documents. If you select to save the documents, they will be available on the [In Box \[pg:0303\]](#) in your mailbox for 5 days. If you do not save the documents locally during these 5 days, there will not be a way to recover them.



7. If you are certain that this is the volunteer record you would like to delete, click the **OK** button.

When the process finishes, Volgistics displays the initial Volunteers screen.

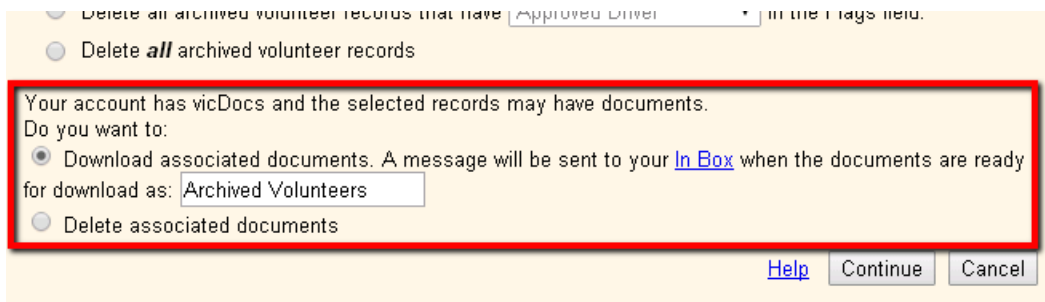
The volunteer file will still be set to include archived volunteers only. You can continue working with archived volunteers, or you can uncheck *Archived volunteers* to work with records in the non-archived section of your database.

### Delete groups of archived volunteer records

If you have access to the [Setup \[pg:0887\]](#) page, you can delete multiple archived volunteer records in a single step. This is a useful capability if you want to purge multiple archived volunteer records from your database without having to delete them individually.

To delete multiple archived volunteer records:

1. Choose Setup from the menu.
2. Select *Account management*.
3. Click *Delete archived volunteer records*.
4. Specify which archived records you want to delete (see the Choosing which archived records to delete section below for details).
5. If your account has the [VicDocs \[pg:1648\]](#) feature enabled, you will see an option to save or delete any documents associated with the records being deleted. If you select to save the documents, they will be available on the [In Box \[pg:0303\]](#) in your mailbox for 5 days. If you do not save the documents locally during these 5 days, there will not be a way to recover them.



6. Click the **Continue** button. A confirmation screen will appear.

7. If you are certain that you want to continue (remember that if records are not restored they are permanently deleted after 5 days), enter your Volgistics password and then click the **Continue** button.

### Choosing which archived records to delete

If you choose to delete groups of archived volunteer records, there are four options for choosing which archived records to delete.

#### Delete all archived volunteer records archived on or before...

Choose this option to delete all of the volunteer records archived on or before the date you specify. Any record that was archived on or before the date you choose will be deleted no matter when (or if) that volunteer last performed service. For example, if you choose this option and select the date 12-31-2015, any volunteer record that was archived on or before December 31, 2015 will be deleted.

You can view the date that individual volunteer records were archived in the *Date archived* field that appears on the History tab of volunteer records.

If you use [Site Level Access \[pg:0092\]](#), volunteer records archived on or before the date you specify will be deleted no matter which Site(s) a volunteer was associated with.

#### Delete all archived volunteer records that have a date of last activity earlier than...

A volunteer's *date of last activity* is the last date for which [service \[pg:1568\]](#) was recorded for the volunteer (if you track volunteer service). [Help topic 2259 \[pg:0076\]](#) explains more about this. You can view the *date of last activity* for individual archived volunteer records in the Statistics box on the [Core tab \[pg:1868\]](#).

Choose this option to delete all of the archived volunteer records that have a *date of last activity* that is earlier than the date you specify; or that do not have any *date of last activity* (volunteers for whom no service was ever recorded). This choice ensures that you do not inadvertently delete archived volunteer records for volunteers who performed service within a recent time frame.

For example, if you choose to delete archived volunteer records for volunteers whose *date of last activity* was earlier than 01-01-2016, then the system will delete archived volunteer records with no *date of last activity*, or no service records for dates later than 12-31-2015.

If you use [Site Level Access \[pg:0092\]](#), archived volunteer records with a *date of last activity* earlier than the date you specify will be deleted no matter which Site(s) a volunteer was associated with.

#### Delete all archived records that have XXXXX in the Flags field

You can choose to delete just the volunteer records that have a specific Flag. This can be an existing Flag that volunteer records already have on them such as if you have archived records with a *Summer Interns 2015* Flag and you want to delete just these records. Or you can create a custom Flag such as *Delete this record* and add it to records in the archive that are no longer needed. To create a new Flag:

1. Select [Setup \[pg:0887\]](#) from the Menu.
2. Expand the *Field options* link.
3. Select *Core tab*.
4. Select **Flags**.
5. Add the new Flag in the *Add a new item* field.
6. Click the **Save** button behind the field name.
7. If no other Flags are needed, click the **Save** button at the bottom of the page.

Once the new Flag is created, you can add it to the Core tab of individual archived records. However, if you want to use the [Tags \[pg:1529\]](#) feature to add the Flag to multiple records at once, you would need to un-archive the records first because archived records cannot be tagged.

If you use [Site Level Access \[pg:0092\]](#), all volunteer records with the Flag you specify will be deleted no matter which Site(s) a volunteer was associated with.

#### Delete all archived volunteer records

Choose this option if you want to completely delete all of the archived volunteer records from your database. Your account will not contain any archived volunteer records if you choose this option.

If you use [Site Level Access \[pg:0092\]](#), archived volunteer records for all Sites will be deleted.

#### **Remove a deleted archived record before the 5 day hold period ends**

You can permanently remove a volunteer record from the database before the end of the 5 calendar day hold period if needed. Please remember that there will *not* be a way to recover the record from the system if you do this. All information associated with the record will be removed from the system and it will not be recoverable. To remove a record before the end of the 5 day hold period:

1. Choose **Volunteers** from the [menu \[pg:0215\]](#). The initial **Volunteers** screen appears.
2. If the **Advanced Include** options are not already displayed, click the **Advanced options** button.

volgistics™

**Volunteers**

Assignments  
Coordinators  
Schedule  
Tickler  
Post  
Tags  
Sets  
Print  
Mailbox  
Who's Here  
Setup  
Welcome  
Help  
Exit

**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

**Include**

Status: Any  
Type: Any  
Flag: Any  
Site: Any  
Set: Any  
Tags: Any  
Kind: Any

↑ Clear

Advanced options

3. Check the *Archived volunteers* checkbox in the Include options and then click the **Show deleted volunteers** button.

**Tags**

- Any
- Tagged
- Not tagged

**Kind**

- Any
- Individual
- Group

Archived volunteers

Basic options

Show deleted volunteers

**Find**

Find from within all volunteer records.

4. Click the **Permanently Delete** button beside the record you need to remove now.

**Archived Volunteers**

4 Deleted Volunteers listed

	Name			Num
	Acosta, Cory	(03-03-2014)	Restore	Permanently delete
	Farmer, Jill	(03-03-2014)	Restore	Permanently delete
	Hewlett, Patricia	(03-03-2014)	Restore	Permanently delete
	Snyder, Thelma	(03-03-2014)	Restore	Permanently delete

4 Deleted Volunteers listed

## Related help

[Help Topic 2309 \[pg:2016\]](#) - Delete volunteer records

[Help Topic 2311 \[pg:1888\]](#) - How do I restore a deleted volunteer record?

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## Tracking References

Help topic 2011

Added or revised 10-08-2012

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You can track references for volunteers on the Contacts tab in the volunteer record. To add a new reference for a volunteer:

1. Choose Volunteers from the [menu \[pg:0215\]](#) and then locate the volunteer's record.
2. Open the volunteer's record and click on the Contacts tab.
3. Click the **Add a new contact** button. This opens a new, blank Contact record.
4. Enter the reference information - such as name and address. You can optionally record the reference's relationship to the volunteer using the "Relationship" field.
5. In the "Kind" field, select "Reference."
6. Click the **Save** button.

### Reference

Last name:	<input type="text" value="Mathews"/>	Kind:	<input type="text" value="Reference"/>
First name:	<input type="text" value="Kevin"/>	Relationship:	<input type="text" value="Neighbor"/>
Middle name:	<input type="text"/>	Title:	<input type="text" value="Mr."/>
Nickname:	<input type="text"/>	Contacted:	<input type="text" value="Yes"/>
Job Title:	<input type="text"/>	Verified:	<input type="text" value="05-22-2007"/>
Employer name:	<input type="text"/>		
Street 1:	<input type="text" value="2300 Smithville Road"/>	Home:	<input type="text"/>
Street 2:	<input type="text"/>		<input type="checkbox"/> Ok to call
Street 3:	<input type="text"/>	Work:	<input type="text" value="(812) 555-2144"/>
City:	<input type="text" value="Bedford Falls"/>		<input checked="" type="checkbox"/> Ok to call
State:	<input type="text" value="OR"/>	Cell:	<input type="text"/>
Zip:	<input type="text" value="12345"/>		<input type="checkbox"/> Ok to call
		Fax:	<input type="text"/>
			<input type="checkbox"/> Ok to call
		Pager:	<input type="text"/>
			<input type="checkbox"/> Ok to call
		Other:	<input type="text"/>
			<input type="checkbox"/> Ok to call
		Email:	<input type="text"/>

If you want to track more than one reference, repeat these steps to add additional references.

If you check volunteer references, and you want to keep a record of when a particular reference was checked, use the "Contacted" field to show that the reference was contacted. You can also enter a date in the "Verified" field to show when the reference was checked.

If you use [online volunteer application forms \[pg:0413\]](#), you can ask volunteers to enter up to four references on their application. The applicant's references will appear on the Contacts tab once you receive their application. You can find more information on how to set this up in [Help topic 1059 \[pg:1346\]](#).

### **Need additional dropdown list entries?**

If they are needed, [Volgistics Administrators \[pg:0052\]](#) can add more items to the "Kind," "Relationship," and "State" dropdown list fields on the Contacts record. [Help topic 2018 \[pg:0963\]](#) explains more about how to do this.

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## **Tracking Emergency Contacts**

Help topic 2012

Added or revised 01-09-2015

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You can track emergency contact records for volunteers on the Contacts tab in the volunteer record. To add a new emergency contact for a volunteer:

1. Choose Volunteers from the [menu \[pg:0215\]](#) and then locate the volunteer's record.
2. Open the volunteer's record and click on the Contacts tab.
3. Click the **Add a new contact** button. This opens a new, blank Contact record.
4. Enter the emergency contact information you want to track. For example, you can enter just a name and phone number, or you can also record a complete address for the emergency contact. You can optionally record the emergency contact's relationship to the volunteer using the "Relationship" field.
5. In the "Kind" field, select "Emergency contact."
6. Click the **Save** button.

Last name: Bailey  
 First name: Mary  
 Middle name: Title:  
 Nickname:  
 Employer name: Drewer Associates, Inc.  
 Street 1:  
 Street 2:  
 Street 3:  
 City:  
 State: Zip:

Kind: **Emergency contact**  
 Relationship: Spouse  
 Contacted:  
 Verified:

Home: (812) 555-3939  Ok to call  
 Work: (812) 555-5000  Ok to call  
 Cell:  Ok to call  
 Fax:  Ok to call  
 Pager:  Ok to call  
 Other:  Ok to call  
 Email:

Pull from Core Swap with Core Save Delete Cancel

If you want to track more than one emergency contact, repeat these steps to add additional contacts.

If you use [online volunteer application forms \[pg:0413\]](#), you can ask volunteers to enter up to four emergency contacts on their application. The applicant's emergency contact information will appear on the Contacts tab once you receive their application. You can find more information on how to set this up in [Help topic 1059 \[pg:1346\]](#).

### Need additional dropdown list entries?

If they are needed, [Volgistics Administrators \[pg:0052\]](#) can add more items to the "Kind," "Relationship," and "State" dropdown list fields on the Contacts record. [Help topic 2018 \[pg:0963\]](#) explains more about how to do this.

---

## Tracking Employers

Help topic 2013

Added or revised 10-09-2012

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You can track information about a volunteer's employer, or their profession, on the Contacts tab in the volunteer record. To add employer information for a volunteer:

1. Choose Volunteers from the [menu \[pg:0215\]](#) and then locate the volunteer's record.
2. Open the volunteer's record and click on the Contacts tab.
3. Click the **Add a new contact** button. This opens a new, blank Contact record.

4. Enter the employer information you want to track. For example, you can enter just the name of the employer, or you can also record a complete address.
5. In the "Kind" field, select "Employer."
6. Click the **Save** button.

### Employer

Last name: <input type="text"/>	Kind: <input type="text" value="Employer"/>
First name: <input type="text"/>	Relationship: <input type="text"/>
Middle name: <input type="text"/> Title: <input type="text"/>	Contacted: <input type="text"/>
Nickname: <input type="text"/>	Verified: <input type="text"/>
Job Title: <input type="text" value="President"/>	
Employer name: <input type="text" value="Bedford Falls Savings &amp; Loan"/>	
Street 1: <input type="text"/>	Home: <input type="text"/> <input type="checkbox"/> Ok to call
Street 2: <input type="text"/>	Work: <input type="text"/> <input type="checkbox"/> Ok to call
Street 3: <input type="text"/>	Cell: <input type="text"/> <input type="checkbox"/> Ok to call
City: <input type="text"/>	Fax: <input type="text"/> <input type="checkbox"/> Ok to call
State: <input type="text"/> Zip: <input type="text"/>	Pager: <input type="text"/> <input type="checkbox"/> Ok to call
	Other: <input type="text"/> <input type="checkbox"/> Ok to call
	Email: <input type="text"/>

If you want to track more than one employer, repeat these steps to add additional employer records.

If you check volunteer employment records, and you want to keep a record of when a particular employer was checked, use the "Contacted" field to show that the employer was contacted. You can also enter a date in the "Verified" field to show when the employer was checked.

If you use [online volunteer application forms \[pg:0413\]](#), you can ask volunteers to enter up to four employers on their application. These could be past or current employers if you use these for background checks. The applicant's employer information will appear on the Contacts tab once you receive their application. You can find information on how to set this up in [Help topic 1059 \[pg:1346\]](#).

#### Need additional dropdown list entries?

If they are needed, [Volgistics Administrators \[pg:0052\]](#) can add more items to the "Kind," "Relationship," and "State" dropdown list fields on the Contacts tab. [Help topic 2018 \[pg:0963\]](#) explains more about how to do this.

Volgistics Administrators may also customize fields that appear on the Contact record. In the example pictured above, the "Job Title" field was customized using the "Spare text" field on the Contacts tab. [Help topic 2017 \[pg:0957\]](#) explains how to customize fields.



---

# Tracking Volunteer Status

Help topic 2014

Added or revised 10-09-2012

---

An important piece of information in every volunteer record is the volunteer's status. The term "status" describes the volunteer's overall relationship with your organization. Every volunteer record in Volgistics must have a status selected in the Status field on the [Core tab \[pg:1868\]](#) of the record.

You can find information on how organizations usually use the default statuses provided in Volgistics in the *Default Status Names* section of this help topic. You can also customize new statuses to suit your needs. The *Customizing the Status Field* section shows how to do this.

## To view or change a volunteer's current Status

1. Choose Volunteers from the [menu \[pg:0215\]](#).
2. Use the letters at the top of the Volunteers screen to browse for the appropriate volunteer record.
3. Select the volunteer's record. The Core tab for this volunteer appears. You'll see the volunteer's status listed in the first section of the Core tab.
4. To change the volunteer's status, select the new status from the dropdown list.
5. Click the **Save** button. The volunteer record will refresh and the new status will be permanently saved.

### Bailey, George

Core Profile Service Schedule History Contacts Notes

Save Cancel Archive Delete Combine  Tagged Previous Next

**Name**

Last name:  Status:

First name:  Type:

The status field is located here

## To view or change a volunteer's Status dates

Whenever you change a volunteer's status, Volgistics automatically makes a Date entry on the History tab showing the date the volunteer's status changed, and what status it changed to. To see the history of a volunteer's statuses, select their History tab and view the Status entries in the Dates box.

# Bailey, George

Core Profile Service Schedule **History** Contacts Notes

Save Cancel  Tagged Previous Next

Dates				
	Event	Date	Expires	Notation
Status	Active	01-13-2004		<a href="#">Edit</a>

Each time a volunteer's status changes, Volgistics automatically records the date on the volunteer's History tab, like this.

In this example, George Bailey became an Active volunteer on January 13, 2004.

These automatic Date entries default to the current date (the date you changed their status). If necessary, you can always edit these Date entries to show an earlier or later date.

It's a good idea not to delete these automatic Date entries (unless you made one by changing a volunteer's status inadvertently) because they enable Volgistics to provide you with important information about volunteer participation over time.

Every volunteer you track must have a volunteer status.

## Default Status Names

Volgistics provides four volunteer status categories by default:

- Prospect
- Applicant
- Active
- Inactive

These categories apply well to most volunteer programs. Here's what each status category means:

### Prospect

Prospective volunteers are people who have expressed an interest in volunteering, or you want to recruit. Typically these are people who call or stop by to ask about volunteer opportunities.

Information about prospective volunteers is like gold: these individuals may be the future volunteer strength of your agency! While not all prospective volunteers will eventually become active, many may become contributing volunteers.

### Applicant

Applicants are people who have started the process toward becoming a volunteer. Normally this means they have submitted an application form. (Applicants differ from Prospects in that Prospects have only expressed an interest in volunteering; Applicants have taken action toward becoming a volunteer.)

### Active

Active volunteers are those who have completed your induction process and are currently contributing members of your volunteer force.

### Inactive

Inactive volunteers are formerly active volunteers who are no longer contributing members of your force. This category usually includes volunteers who are inactive for any reason: they moved, went back to work, resigned, were terminated, and so forth.

It may be that if volunteers have the Inactive Status for a certain length of time, you will want to move their record to the archived section of your database. Because archived records have more limited functionality compared to non-archived records (they cannot receive email messages, be scheduled for assignments, login to VicNet or VicTouch, etc.), archived records cost less on a record-by-record basis. [Help topic 2000 \[pg:1819\]](#) explains more about how to archive volunteer records.

Often, volunteers start as a Prospect, then progress to Applicant, Active, and eventually Inactive status. What prompts you to add a volunteer to the database and/or change their status is up to you. The main point is that you should use the Status field to track a volunteer's progress toward becoming a contributing volunteer.

Tracking status in this way is important for many reasons:

- It enables you to generate mailings and lists that include only the active volunteers.
- It allows you to measure the current strength of your volunteer program. ("How many active volunteers do we have?")
- It allows you to identify potential volunteers and encourage them to apply for a volunteer position at your agency.
- It allows you to identify individuals who have started the application process, but may need some encouragement to move things along.

### **Configuring a Default Status**

The Status field always has a default value. Each time you add a new volunteer record, it starts out with this default status. You can change the default status if you have access to Volgistics [Setup \[pg:0887\]](#).

To change the default status:

1. Choose Setup from the [menu \[pg:0215\]](#).
2. Select Field Options. A list of all the tabs in Volgistics appears.
3. Select the Core tab. A list of all the fields located on the Core tab appears.
4. Click on Status. The Field Properties window appears.

Field location: **Core tab**

Type of field: **Dropdown**

Field name:

Require an entry: Always

Default entry:

5. Next to "Default entry," choose the volunteer status you want to appear on new volunteer records.

- If you normally track prospective volunteers in Volgistics, then set this to "Prospect" since most of the new records you create will be for prospects.
- If you do not create volunteer records in Volgistics until after you receive an application, set this to "Applicant" since most of the new records you create will be for applicants.
- If you only enter volunteers into Volgistics after they become active, set this to "Active" since most of the new records you create will be for active volunteers.

6. Click the **Save** button.

### Customizing the Status Field

If you have access to Volgistics [Setup \[pg:0887\]](#), you can change the status names, add additional statuses (up to eight), and merge statuses.

When re-naming or adding a status, remember that you should use the Status field only to describe the overall relationship that volunteers have with your organization. Since there are more appropriate places for tracking the following things, you should not use the Status field to track these:

- Assignments. See [Help topic 1185 \[pg:0193\]](#) for instructions on tracking a volunteer's assignments.
- Volunteer Types (e.g. Adult vs. Junior). See [Help topic 2263 \[pg:0212\]](#) for information on tracking volunteer Types.
- Volunteer Affiliations (e.g. RSVP, Auxiliary etc.). See [Help topic 2263 \[pg:0212\]](#) for information on creating Flags.
- Whether or not a record is archived. Please see the note below for more information on this.

#### Please note:

In some cases organizations may choose to create a status called "Archived." Giving a volunteer record a status of "Archived" is not the same as actually placing the volunteer's record in the archived section of your database. Records in the archived section of the database can have any of the statuses that are setup in your account. While it might be helpful to create a status of "Archived," a volunteer record could have this status in either the non-archived, or the archived, section of your account. See [Help topic 2000 \[pg:1819\]](#) for information on archiving records.

To customize the Status field:

1. Choose Setup from the [menu \[pg:0215\]](#).
2. Select Field Options. A list of all the tabs in Volgistics appears.
3. Select the Core tab. A list of all the fields located on the Core tab appears.
4. Click on Status. The Field Properties window appears.

**Drop down table items**

Add a new item:

Active

#### Add a new status

Type the new status next to "Add a new item" and click the **Save** button. You can create up to eight different statuses.

Result: The new item is an option in the Status field.

#### Rename a status

Edit the entry you would like to change and click the **Save** button.

Result: Volgistics renames the entry in the dropdown list and in any record that has the corresponding entry. For instance, if you rename "Inactive" to "Resigned," any volunteer that had "Inactive" in the Status field now has "Resigned."

#### Combine one status with another

1. Determine which dropdown list item you would like to merge. Click the corresponding **Merge** button. The "Merge drop-down items" window appears.
2. The screen will verify the item you chose to merge and will ask you which entry you would like to merge into. Select the appropriate entry.
3. Click the **Go** button.

**Please note:** If the status is setup as the default status, the **Merge** button will not appear beside the status. If you want to combine this status with another status, you would need to choose a different default status first.

Result: After you merge two dropdown items together, any records that had the first entry will have the second entry you choose instead. The merged item will no longer appear as a choice in the Status field.

For instance, if you merge "Prospect" into "Applicant," any record that had "Prospect" as their status now has "Applicant." Prospect is no longer an option in the Status field.

Note: Several minutes may pass before the merged values appear in your database.

### Delete a status

Every volunteer record must have a volunteer status. For this reason, it is not possible to delete a status (deleting a status could potentially leave some volunteers without a status). If you have a status you no longer need, instead of deleting it combine it with another status. This ensures that no volunteer records are left without any status on their record. For example, if you have a status called "Moved" that you want to remove from your system, combine it with a status such as "Inactive." Any volunteers who had the "Moved" status will be changed to the "Inactive" status, and "Moved" will be removed from the Status dropdown list.

---

## **Adding a New Volunteer Record**

Help topic 2015

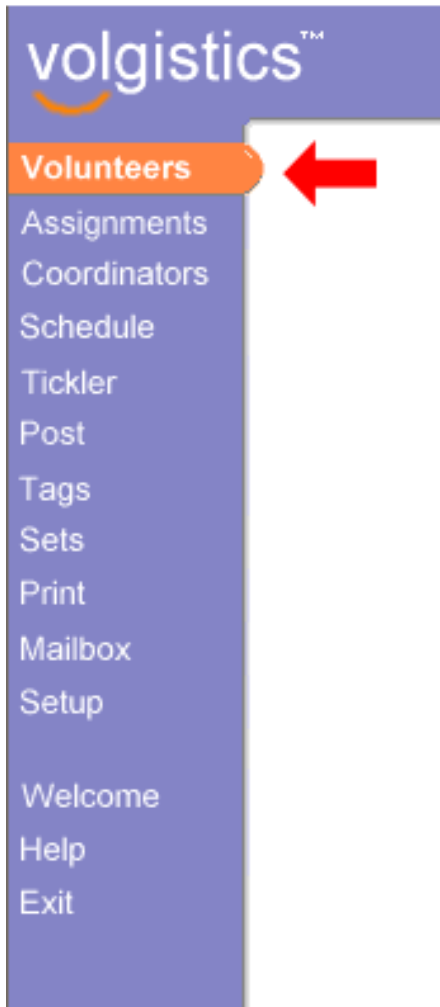
Added or revised 03-04-2008

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If you use on-line volunteer application forms, chances are many or all of your new volunteers will submit an application form on-line, in which case Volgistics establishes the volunteer records for you automatically when you retrieve new applications.

Still, there may be times when you want to add a new volunteer record to Volgistics yourself, manually. Here's how to do this:

1. Choose Volunteers from the [menu \[pg:0215\]](#).



2. Click the "New Volunteer" button.

3. Enter (at least) the new volunteer's first and last name on the Core tab, then click the "Save" button.

You have now established a new volunteer record. Note that you cannot select any of the other tabs in the new volunteer's record until you save the record for the first time.

The amount of information you initially enter for a new volunteer record is entirely up to you. Often, just the basic information is entered on the Core tab, and then additional information is entered over time as it becomes available.

# How do I change a volunteer's Start Date?

Help topic 2022

Added or revised 03-10-2011

A volunteer's *Start date* is shown on the History tab in their volunteer record. By Default, the *Start date* is the date a volunteer first became active (their earliest 'active' status date).

Dates		Start date: 02-02-2004	Date entered: 10-27-2006			
		Stop date: 07-23-2005				
	Event	Date	Expires	Notation		
Status	Inactive	07-23-2005			Edit	Delete
Status	Active	02-02-2004			Edit	Delete
Status	Applicant	01-09-2004			Edit	Delete
Checklist	Attends orientation	03-04-2004		See file	Edit	Delete
Checklist	Initial interview	01-12-2004		Complete	Edit	Delete
Class	Customer Service Training	08-02-2004		Completed	Edit	Delete

[Add](#)

In the example shown above, the volunteer's status was made 'active' on February 2, 2004. Therefore February 2, 2004 became their 'start date' automatically.

If you want this volunteer's 'start date' to be a date other than February 2, 2004, change their 'active' status date. For example, suppose this volunteer actually started volunteering years earlier, on December 1, 1995. You can change their 'active' status date to 12-01-1995 by editing their active status date entry:

1. Click the Edit button on the date you want to change.

Status	Inactive	07-23-2005			Edit	Delete
Status	Active	02-02-2004			Edit	Delete
Status	Applicant	01-09-2004			Edit	Delete

2. In the Edit box, enter the new date.

**Edit**

Add a:  date

Event:

Date:

Notation:



3. Click the Save button.

The volunteer's start date will change automatically to reflect their new 'active' status date.

Dates		Date entered: 10-27-2006				
Start date:	12-01-1995	Stop date:	07-23-2005			
Status	Event	Date	Expires	Notation	Edit	Delete
		07-23-2005				

Using the [Start and stop date rules \[pg:1017\]](#), it's possible to customize your system so that other status dates - such as a volunteer's 'applicant' date - will become their *Start date*. If you've customized your system this way, a volunteer's *Start date* may be based on a status date other than the 'active' status date.

### Related help

[Help Topic 2315 \[pg:1890\]](#) - Start and stop dates

[Help Topic 2314 \[pg:1017\]](#) - Start and stop date rules

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## Finding Volunteer Records

Help topic 2023

Added or revised 04-17-2017

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Once you've started [adding new volunteer records \[pg:1878\]](#) to your database, you'll eventually want to go back and open individual volunteer records to look-up information or add more data. This help topic explains how to find and open records.

Click on a link in the Content window below to be taken directly to that section of the Help topic.

### Content

Controlling Records Shown

Using the Alphabetical Index

Viewing All Volunteers

Using Include Options

Find by Last Name

Find by First Name

Find by Number

Find by Email Address

Find by Group Name

Using Wildcard Search Features

Sort & Search Records

### Controlling Records Shown

When you use one of the methods shown in this help topic to bring up your volunteer records, the Volunteers page may not load all of your records initially if you have a large number of records. If the search results contain more records than the dropdown is set to, the entry count will indicate that not all of the records are shown.

volgistics  
Volunteer Logistics

Volunteers

Assignments  
Coordinators  
Schedule  
Tickler  
Post  
Tags  
Sets  
Print  
Mailbox  
Who's Here

**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

Tag Un-tag ⓘ

Show 5000 entries

Showing 1 to 5,000 of 18,160 entries

Name	Tag	Group name	Street	Search
Anderson, Lionel	<input type="checkbox"/>	Puritan Food Stores, Inc.	810 Bostwick Blvd.	Hamil
Armstrong, Marv F	<input type="checkbox"/>		4985 Malow Court	Casc

In this case, you can advance to the next page of records by using the controls at the top or bottom of the right hand side. Select a page number in the sequence, or click the *Next* link.

Search:

Previous 1 2 Next

Number	Status	Type	Kind	Home	Work
Search	<input type="text"/>	Search	Search	Search	Search

If you need to see and work with all records at once, select *All* from the dropdown on the top left side of the page.

volgistics  
Volunteer Logistics

Volunteers

Assignments  
Coordinators  
Schedule  
Tickler  
Post  
Tags  
Sets  
Print  
Mailbox  
Who's Here

**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

Tag Un-tag ⓘ

Show All entries

Show 1000 2500 5000

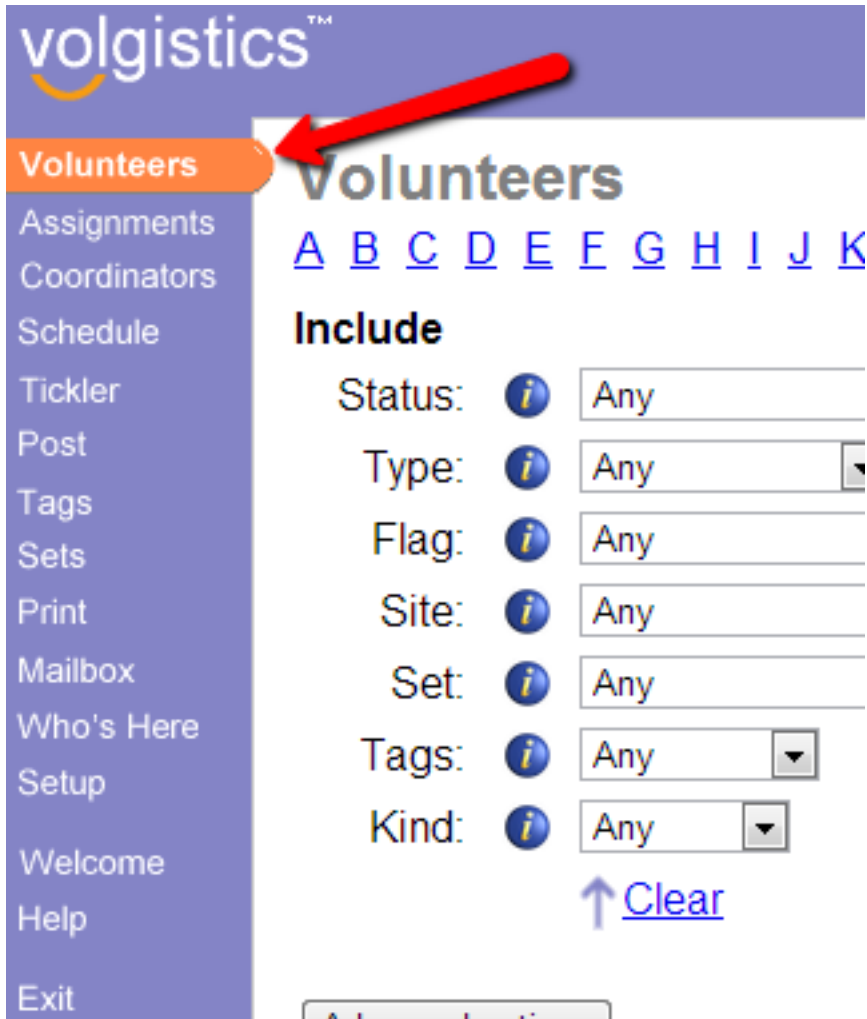
Showing 1 to 5,000 of 18,160 entries

Name	Tag	Group name	Street	Search
Anderson, Lionel	<input type="checkbox"/>	Puritan Food Stores, Inc.	810 Bostwick Blvd.	Hamil
Armstrong, Marv F	<input type="checkbox"/>		4985 Malow Court	Casc

### Using the Alphabetical Index

One way to locate a volunteer record is to use the alphabetical name index located at the very top of the Volunteers screen.

1. Choose Volunteers from the menu [pg:0215].



2. Across the top of the Volunteers screen you'll see the letters of the alphabet. Click on the first letter of the volunteer's last name. For example, if you're looking for *George Bailey*, click the "B" link to see the volunteers whose last names begin with the letter B.

3. Volgistics displays an alphabetized list of the volunteers whose last names start with the letter you selected. If necessary, scroll down this list until you find the volunteer you're looking for. When you see the volunteer you're looking for, click on his or her name to open the record.

### Viewing All Volunteers

To view a list of all volunteer records:

1. Choose Volunteers from the [menu \[pg:0215\]](#).
2. Click the "All" link next to the letter "Z" in the alphabetical index.

### 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](#)

You'll see a list of all volunteers.

### Using Include Options

You might want to limit your search to just certain volunteers, such those with an Active Status or just a certain Flag or Type. You can use the fields under the *Include* heading to do this. Available fields include [Status](#), [Type](#), [Flag](#), [Site](#), [Set](#), [Tags](#) and [Kind](#). The fields you see on the Volunteer page may not include all of these options depending on your account's setup.

Here is how to use the *Include* options:

1. Choose Volunteers from the [menu](#).
2. Locate the *Include* section.
3. Use the fields to limit your search to just records with the desired *Status*, *Type*, *Flag*, *Site*, *Set*, *Tags* and/or *Kind*. For example, to search for just records with the Active *Status*, select "Active" from the Status dropdown list and leave the other fields set to "Any."

### Include

Status:    

Type:   

Flag:   

Site:   

Set:   

Tags:   


Kind:   


 [Clear](#)



4. Click on a letter of the alphabet or the All link to see records that have the selection you made in the *Include* field.



You can also use more than one *Include* field at a time for more advanced searches. For example, if you wanted to find only volunteers with the Active Status who also have the "Approved Driver" Flag on their record, select "Active" from the Status dropdown and "Approved Driver" from the Flag dropdown and then complete your search.


## Include



Status:  Active  



Type:  Any 


Flag:  Approved Driver  

Site:  Any 

Set:  Any 

Tags:  Any 

Kind:  Any 

 [Clear](#)

Selections in the *Include* fields will stay in place during your [session \[\\_\\_\\_\\_\\_\]](#) unless they are changed. You can either reset the field's dropdown to "Any," or click the "Clear" link underneath the fields to reset them. The fields will reset to "Any" automatically when your session ends.

You can also fine tune your searches even more by clicking the **Advanced options** button that appears under the fields. This page allows you to do things such as selecting multiple options for a field, or excluding certain options for a field. For example, to find all records with the Active and Applicant Statuses you would set the Status field as shown below and then click the "All" link.

---

### Status

- Any  
 Only these  
 Not these
- |  |   |                                   |
|--|---|-----------------------------------|
| <input checked="" type="checkbox"/> Active | <input checked="" type="checkbox"/> Applicant | <input type="checkbox"/> Inactive |
| <input type="checkbox"/> Leave of Absence  | <input type="checkbox"/> Prospect             |                                   |
- 

Or if you wanted to find all records with either the "CPR Certified" or the "Certified Life Guard" Flags, you'd set the Flag field as shown below and then click the "All" link.

---

### Flag

- Any  
 Any of these  
 All of these  
 None of these
- |   |   |  |
|---|---|--|
| <input type="checkbox"/> Approved Driver          | <input type="checkbox"/> Auxiliary              | <input checked="" type="checkbox"/> Certified Life Guard |
| <input checked="" type="checkbox"/> CPR Certified | <input type="checkbox"/> Emergency Availability | <input type="checkbox"/> RSVP                            |
| <input type="checkbox"/> ServSafe Certified       |   |  |
-

The "Any of these" setting functions like an *or*. It would bring up volunteers if they have either of the Flags. The "All of these" setting functions like an *and*. Volunteers would need both Flags on their records in order to be included in the results if this were selected.

Click the **Basic options** button to return to first page when you're done using the advanced search features.

Selections you make on the *Advanced options* page will not remain selected when you leave the page.

### Find by Last Name

You can also find volunteer records by last name. To find the record for an individual volunteer by the volunteer's last name:

1. Choose Volunteers from the [menu \[pg:0215\]](#).
2. Enter the volunteer's last name in the *Last Name* field and then click the **Go** button located just to the right. If you're unsure of the spelling of the volunteer's name, see the Using Wildcard Search Features section of this help topic.

### Find

Find from within all volunteer records

Last Name:	<input type="text" value="Bailey"/>	<input type="button" value="Go"/>
First Name:	<input type="text"/>	<input type="button" value="Go"/>
Number:	<input type="text"/>	<input type="button" value="Go"/>
Email:	<input type="text"/>	<input type="button" value="Go"/>
Group Name:	<input type="text"/>	<input type="button" value="Go"/>

3. Volgistics displays an alphabetized list of volunteers whose last names match the name you entered. Locate the exact volunteer you're looking for and click on his or her name to open the record. If the record does not appear on the list, you might find [Help topic 2291 \[pg:1621\]](#) useful.

### Find by First Name

There may be times when you remember a volunteer's first name, but not their last. You can look-up volunteer records using the volunteer's first name, too. To find the records for volunteers with a certain first name:

1. Choose Volunteers from the [menu \[pg:0215\]](#).
2. Enter the volunteer's first name in the *First Name* field and then click the **Go** button located just to the right. If you're unsure of the spelling of the volunteer's name, see the Using Wildcard Search Features section of this help topic.
3. Volgistics displays an alphabetized list of the volunteers whose first names match the name you entered. Locate the exact volunteer you're looking for, and then click on his or her name to open the record. If the record does not appear on the list, you might find [Help topic 2291 \[pg:1621\]](#) useful.

### Find by Number

Some volunteer leaders use numbers to identify volunteers. If you assign numbers to your volunteers, you can locate a volunteer by their number by:

1. Choose Volunteers from the [menu \[pg:0215\]](#).
2. Enter the volunteer's number in the *Number* field and then click the **Go** button located just to the right. If you only know part of the volunteer's number, see the Using Wildcard Search Features section of this help topic.
3. If there is one, Volgistics displays the name of volunteer that has the number you entered. Click on the volunteer's name to open their record. If the record does not appear on the list, you might find [Help topic 2291 \[pg:1621\]](#) useful.

### Find by Email Address

To find the record for a volunteer using their email address:

1. Choose Volunteers from the [menu \[pg:0215\]](#).
2. Enter the volunteer's email address in the *Email* field and then click the **Go** button located just to the right. If you only know part of the address, see the Using Wildcard Search Features section of this help topic.
3. Volgistics displays an alphabetized list of the volunteers whose email addresses match the email address you entered. Locate the volunteer you're looking for and then click on his or her name to open the record. If the record does not appear on the list, you might find [Help topic 2291 \[pg:1621\]](#) useful.

Of course the volunteer's email address must have been recorded in their record in order for Volgistics to be able to locate the record by email address. You enter volunteer email addresses on the [Core tab \[pg:1868\]](#).

### Find by Group Name

You can also find a [group record \[pg:1802\]](#) by searching for the name of the group by:

1. Choose Volunteers from the [menu \[pg:0215\]](#).
2. Enter the group's name in the *Group Name* field and then click the **Go** button located just to the right. If you only know part of the name, see the Using Wildcard Search Features section of this help topic.
3. Volgistics displays an alphabetized list of the records that match the name you entered. Locate the record you're looking for and then click on the link to open it. If the record does not appear on the list, you might find [Help topic 2291 \[pg:1621\]](#) useful.

### Using Wildcard Search Features

If you only know part of the information for the record you're trying to locate, or are unsure of the spelling for a search field, you can also use wildcard searches in the fields under the *Find* heading. Here is the way these work:

- You can enter just the first part of the information in the field. For example, if you're looking for a volunteer named "George Bailey" you can enter "Ba" in the *Last Name* field. This will bring up all records where the last name starts with "Ba" such as Bailey, Baker, Barber, Barclay, etc. This option will work for the *Last Name*, *First Name*, *Email*, and *Group Name* fields. However, it will not work for the *Number* field.
- You can use the asterisk character (\*) in place of the information you do not know. This can be used at the start, end or in the middle of the information you do know. For example, to look for a volunteer with the last name of "Bailey," you could use "Bai\*" or "\*ley" or "Ba\*ey". This feature will work in any of the fields including the *Number* field. For example, to search for a volunteer with the number of "1234567" you could enter "123\*" or "\*567" or "12\*67" in the *Number* field. Here is an example of how this could be used to find all volunteers with a Yahoo email domain:

## Find

Find from within all volunteer records

Last Name:	<input type="text"/>	<input type="button" value="Go"/>
First Name:	<input type="text"/>	<input type="button" value="Go"/>
Number:	<input type="text"/>	<input type="button" value="Go"/>
Email:	<input type="text" value="*@yahoo.com"/>	<input type="button" value="Go"/>
Group Name:	<input type="text"/>	<input type="button" value="Go"/>

Only one asterisk character (\*) will work as a replacement for information in the wildcard searches. For example, "\*\*ile\*" in the *Last Name* would not work to find a record with the last name of "Bailey." Also, only the asterisk is a valid wildcard character for the *Find* fields. Other characters such as a question mark (?) are not valid in this location. However, the column headings shown in the Sort & Search Records section below do support other wildcard characters.

## Sort & Search Records

### Sorting Records

When the Volunteers page shows more than one record, the page is initially sorted alphabetically according to the volunteer's last name. To help you find certain records, you can click on a column heading to re-sort the page according to that column's information.

Showing 1 to 166 of 166 entries

Name	Tag	Number	Status	Type	Last Activity	S
<input type="text" value="Search"/>		<input type="text" value="Search"/>	<input type="text"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>	S
Armstrong, Mary	<input type="checkbox"/>	816	Applicant	Adult	06-11-2013	
Baccus, Lydia	<input type="checkbox"/>	774	Active	Adult	12-18-2014	08-
Bailey, Victor	<input type="checkbox"/>	1155	Applicant	Adult	06-11-2013	
Bargas, Jessica	<input type="checkbox"/>	830	Applicant	Adult	06-11-2013	
Barker, Geraldine	<input type="checkbox"/>	910	Active	Adult	12-17-2014	03-

For example, if the volunteer's [Date of Last Activity \[pg:0076\]](#) is included on this page [\[pg:1381\]](#), you can sort the page from the earliest to the most recent date by clicking the *Last Activity* heading. Click the heading again to sort the page to display the most recent dates at the top and the earliest dates at the bottom.

You can even sort the page based on the information in multiple columns. For example, you can sort the page according to the volunteer's [Status \[pg:1832\]](#) first by clicking on the heading of the *Status* column. You can then sort the records again according to the volunteer's [Type \[pg:0212\]](#) by holding down the *SHIFT* key on your keyboard while clicking on the heading of the *Type* column. The original sorting by *Status* will be maintained and then the records will be sorted by *Type*.

**Please note:** It is not possible to sort columns with icons or checkboxes such as the *Tag* column, or the [email validity \[pg:0377\]](#) or [text number validity \[pg:0333\]](#) indicator columns.


### Searching for Records



There are various ways you can search for just certain records in Volgistics.

One way is to [create a Set \[pg:0859\]](#) to query the database based on certain conditions such as [how much service \[pg:1581\]](#) a volunteer has recorded. Sets can be created based on any of the rules shown in [help topic 2177 \[pg:0853\]](#). After you create the Set, you can see the volunteers the Set contains by selecting the Set from the dropdown as shown in the Using Include Options section above.

Another way you can find certain records without creating a Set is to use the *search* options on the Volunteers page. Once you have a group of records showing on the page, you can search for certain records in two different ways. One is to use the *Search* box that appears in the top right corner to search the entire page.

 Search:

Previous 1 Next

Status	Type	Email	Last Activity	Start
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Applicant	Adult	maryearmstrong@pookmail.com	06-11-2013	
Active	Adult	lydiarbaccus@mailinator.com	12-18-2014	08-08-2012
Applicant	Adult	victorbailey@dodgit.com	06-11-2013	
Applicant	Adult	jessicarhargas@dodgit.com	06-11-2013	

The other is to use the search fields that appear at the top of each column. The search function looks for your input from left to right in the field. So, for example, if you need to find a volunteer with a certain last name and you can only remember that it starts with "Fr," enter "Fr" in the search field in the *Name* column to bring up all volunteers whose last names begin with "Fr."

Showing 1 to 3 of 3 entries (filtered from 166 total entries)

Name	Tag	Number	Status	Type	Email
<input type="text" value="Fr"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Freitas, Elaine	<input type="checkbox"/>	1108	Active	College	elainejfreitas@pookm
French, Robert	<input type="checkbox"/>	1205	Active	Adult	robertjrench@spamb
Fryer, Bobbie	<input type="checkbox"/>	1227	Active	Adult	bobbiewfryer@dodgit

The more characters you type in, the more refined your search will be. To return to the un-filtered view. Just remove the characters you entered into the search field using the delete or backspace keys on your keyboard.

You can narrow your search still further by searching for information in multiple columns. Using the example we started above, you could narrow your search for volunteers with last names beginning with "Fr" to just those who have the *College Type [pg:0212]*. To do this you would enter "Co" (or more characters if you wish) in the search field at the top of the Type column.

Showing 1 to 1 of 1 entries (filtered from 166 total entries)

Name	Tag	Number	Status	Type	Email
<input type="text" value="Fr"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="Co"/>	<input type="text"/>
Freitas, Elaine	<input type="checkbox"/>	1108	Active	College	elainejfreitas@pookm

If you need to skip information, or look for just certain information anywhere in the field, the search will allow you to use some [regular expressions \[\\_\\_\\_\\_\\_\]](#). If you are unfamiliar with these, you may need to use a web search or find another source of information on how to perform more advanced searches.

Here's an example of a simple way regular expressions could be used on the page. Let's say you have a cleanup event at neighborhood park on a street called Cherry Ridge Drive. You want to find the volunteers on Cherry Ridge regardless of their house number. In this case, you could use the escape (\) or wildcard (\*) characters in front of "Che" in the Street column to bring up records for your volunteers on Cherry Ridge Drive.

Showing 1 to 3 of 3 entries (filtered from 168 total entries)

Name	Tag	Street	City	State
<input type="text" value="Search"/>		<input type="text" value="*Che"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>
Baccus, Lydia	<input type="checkbox"/>	4632 Cherry Ridge Drive	Wyoming	MI
Ford, Louise	<input type="checkbox"/>	1548 Cherry Ridge Drive	Wyoming	MI
Swindale, William	<input type="checkbox"/>	3022 Cherry Ridge Drive	Wyoming	MI

Here is another example of using regular expressions to filter the page. Let's say you've included the volunteers' [Date of Last Activity \[pg:0076\]](#) on the Volunteers page. ([Help topic 1202 \[pg:1381\]](#) shows how you can control which fields appear on the Volunteers page.) You may want to filter the page to show just the volunteers who have a blank in the field (in other words, they do not have any [service information \[pg:1581\]](#) recorded). To do this, enter the regular expression `^$` into the Search field. The page will filter to show just the volunteers who do not have a date recorded in the Date of Last Activity field. Or, if you want to do the opposite and filter the page to just show volunteers *with* a date entered, enter the regular expression `\d` into the Search field. Now the page will be filtered so that volunteers with a blank in the field are not shown.

## Status Field Search

Because each volunteer record can only have one [Status \[pg:1832\]](#), the Status search field is a dropdown list that contains all the options for Statuses in your account instead of a text field.

## Related help

[Help Topic 1202 \[pg:1381\]](#) - How to customize which fields appear in the volunteer list

[Help Topic 1998 \[pg:1817\]](#) - Finding Archived Volunteer Records

[Help Topic 2291 \[pg:1621\]](#) - Why can't I see or find volunteer records?

[Help Topic 2311 \[pg:1888\]](#) - How do I restore a deleted volunteer record?

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# Volunteer Record Organization

Help topic 2024

Added or revised 03-27-2017

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Each volunteer you track in Volgistics has their own

### *volunteer record*

. Volgistics stores these records in a database, and gives you a variety of ways to retrieve them--individually, in [Sets \[pg:0858\]](#), in printed [reports \[pg:0595\]](#), and in [spreadsheet files \[pg:0513\]](#).

A volunteer record contains information that pertains only to that volunteer and their participation with your organization. If a couple – such as a husband and wife – volunteers, you should create an individual volunteer record for each of them if you want to track personal information (like name and address); volunteer service; Checklist items; or Awards for each person individually, or if you would like to include the individual in Volgistics emails.

Volgistics also has [group records \[pg:1802\]](#) that function similarly to individual records. These are designed to be used if you need to track groups of people who serve collectively as part of a business; service or social club; fraternal organization; or similar group. When you create a group record, that single group record will represent all of the members of that particular group. You can record the name and contact information for a group contact on each group record; however you do not record the names of the individual members of the group.

If you need to track personal information for each individual, but still identify service for a group, you should create individual records and show that they belong to the group with a [Flag \[pg:0212\]](#) on their record.

After you've added a volunteer record to Volgistics, you can always go back to that volunteer's record to add more information, view information, or change something. See [help topic 2023 \[pg:1840\]](#) for a list of the different ways you can find volunteer records. If the record is [archived \[pg:0709\]](#), you may find [help topic 1998 \[pg:1817\]](#) useful.

Volgistics stores the information you track for individual volunteers in a tab format. When you open a volunteer's record (by clicking on their name in a volunteer list), you'll see one or more of these tabs:

- Core
- Profile
- Service
- Schedule
- History
- Contacts
- Notes
- Vic
- Docs

Volgistics always displays the name of the volunteer whose record you've opened at the top of the Volunteer screen, as shown here:

## Bailey, George



To move between the tabs for the selected volunteer simply click the tab you want to view.

If you don't see all of these tabs when you view volunteer records, it means that your organization's [Volgistics Administrator \[pg:0052\]](#) limits your Volgistics access just to the tabs you see. Don't be alarmed if this is the case! Volunteer administrators often simplify things by limiting user access to just the areas of Volgistics used by your organization.

Here is a summary of the kinds of information normally tracked on each tab:

### Core

You'll keep basic personal information about the volunteer and their role in your organization on the [Core tab \[pg:1868\]](#). The Core tab includes: volunteer name, address, telephone numbers, email address, and web site; the volunteer's [Status \[pg:1832\]](#) and [Type \[pg:0212\]](#); any [Flags \[pg:0212\]](#) appropriate to the volunteer; their [Site \[pg:0092\]](#) (if you track volunteers at more than one site); and a [statistical \[pg:1387\]](#) summary of their service such as [Years of service \[pg:0077\]](#) and [Date of last activity \[pg:0076\]](#).

### Profile

Use the Profile tab for managing each volunteer's personal demographic information: their [Date of Birth and age \[pg:1861\]](#); their [photo \[pg:1798\]](#); their availability; their [assignment preferences \[pg:1011\]](#); [characteristics \[pg:0033\]](#) such as skills or interests; and their [email preferences \[pg:0381\]](#). There are also [customizable fields \[pg:0957\]](#) for tracking additional information.

### Service

The Service tab shows the volunteer's (past or current) [assignments \[pg:0138\]](#) in your organization, their actual [service statistics \[pg:1581\]](#) (such as volunteer hours), and any [mandated service \[pg:1419\]](#) requirements they may have.

### Schedule

Use the Schedule tab to manage or view the volunteer's [schedule \[pg:0746\]](#).

### History

This is where you can view or update a volunteer's [Status dates \[pg:1832\]](#), [Checklist \[pg:0142\]](#) (the things they do to become a volunteer or sustain their volunteer standing), past or upcoming [volunteer recognition \[pg:1551\]](#), and key dates such as their [start and stop dates \[pg:1890\]](#). There is also a [message history \[pg:0370\]](#) of messages sent to the volunteer.

### Contacts

Use the Contacts tab to record information about: [volunteer references \[pg:1828\]](#); [emergency contacts \[pg:1829\]](#); the [volunteer's employer \[pg:1830\]](#); [multiple addresses \[pg:1875\]](#) for the volunteer; and other significant people or organizations important to your volunteer record keeping.

### Notes

The Notes tab provides a simple, open ended text field for entering narrative information related to this volunteer. Volunteer leaders often use this space to include information gathered from volunteer interviews, and to record notable events that may occur in the course of this volunteer's participation. Information from [Comment Fields \[pg:1345\]](#) on your organization's application forms also appears here when the application is received.

### Vic

The [Vic tab \[pg:1810\]](#) has access information for the optional [VicNet \[pg:1724\]](#) and [VicTouch \[pg:1778\]](#) components. This tab appears even if these modules are not included in your organization's service level so you can try these modules on a [trial basis \[pg:0082\]](#).

### Docs

The [Docs tab \[pg:1630\]](#) of the volunteer record is used for electronic document storage. If an account has [VicDocs \[pg:1648\]](#) included in their [service level \[pg:0719\]](#), documents in a variety of formats (such as PDF, XLSX, DOCX, PNG, JPEG, etc.) can be uploaded to this tab. The tab is also used to store a PDF file of completed [online application forms \[pg:0413\]](#) for new volunteers. This is available even if VicDocs is not included in the account's service level. [Help topic 2553 \[pg:1319\]](#) has more information on how [System Operator \[pg:0065\]](#) rights are set for the Docs tab.

### **Related help**

[Help Topic 1045 \[pg:1802\]](#) - Tracking Groups

[Help Topic 1998 \[pg:1817\]](#) - Finding Archived Volunteer Records

[Help Topic 1999 \[pg:0709\]](#) - Archived Versus Non-archived Records

- Help Topic 2000 [pg:1819] - Archiving Volunteer Records
- Help Topic 2023 [pg:1840] - Finding Volunteer Records
- Help Topic 2034 [pg:1852] - How do I restore a volunteer record from the archive?
- Help Topic 2154 [pg:1012] - Setting Tab Rights
- Help Topic 2291 [pg:1621] - Why can't I see or find volunteer records?
- Help Topic 2298 [pg:1877] - Adding Volunteer Records
- Help Topic 2299 [pg:1878] - How Volunteer Records Get Into Volgistics
- Help Topic 2309 [pg:2016] - Delete Volunteer Records
- Help Topic 2311 [pg:1888] - How do I restore a deleted volunteer record?
- Help Topic 2330 [pg:1893] - How to Handle Volunteer Records for Deceased Volunteers

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## How do I restore a volunteer record from the archive?

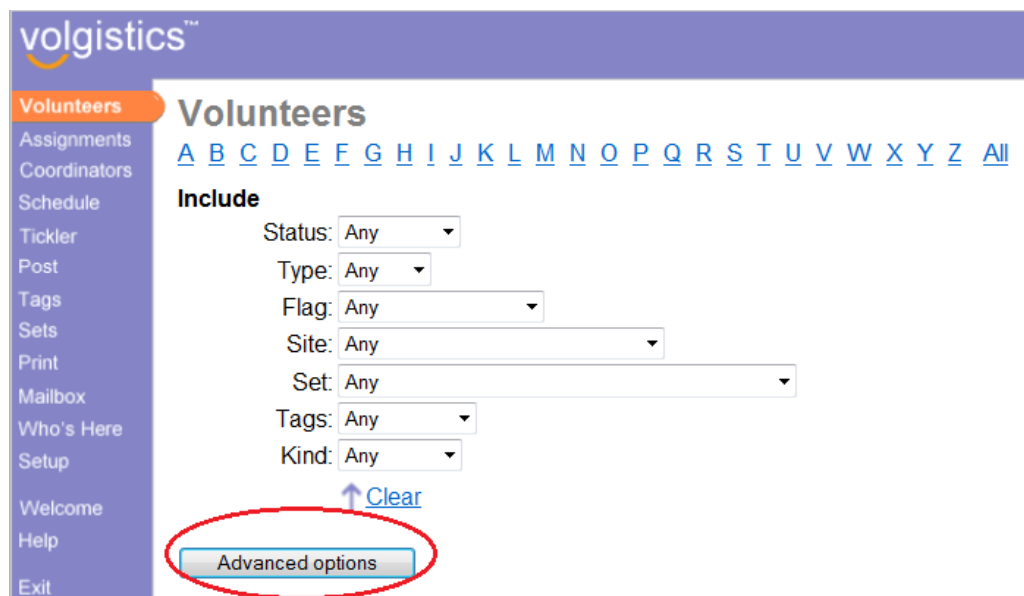
Help topic 2034

Added or revised 03-03-2017

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To un-archive a volunteer record you archived previously:

1. Select 'Volunteers' from the [menu \[pg:0215\]](#).
2. If the 'Advanced' include options are not already displayed, click the **Advanced options** button.



3. Check the "Archived volunteers" checkbox. This changes your view of the volunteer records so you see just the archived volunteers. The page title changes to "Archived Volunteers" to let you know you're viewing the archives.

The screenshot shows the 'Archived Volunteers' filter page in Volgistics. The left sidebar contains navigation links: Volunteers, Assignments, Coordinators, Schedule, Tickler, Post, Tags, Sets, Print, Mailbox, Who's Here, Setup, Welcome, Help, and Exit. The main content area has the following filters:

- Site:** Radio buttons for 'Any' (selected), 'Any of these', and 'None of these'. Under 'None of these', there are checkboxes for 'Almontville Bands Pie Sale', 'Band Camp', 'Great Lakes County Fair', 'Great Lakes Parks & Recreation', and 'Great Lakes Community Hospital'.
- Set:** A dropdown menu labeled 'Volunteers in this Set:' with 'Any' selected.
- Tags:** Radio buttons for 'Any' (selected), 'Tagged', and 'Not tagged'.
- Kind:** Radio buttons for 'Any' (selected), 'Individual', and 'Group'. Below this is a checkbox for 'Archived volunteers' which is circled in red.

At the bottom of the filter section is a 'Basic options' button.

4. Use the letters of the alphabet or the 'All' link to locate the archived volunteer record you want to restore.

5. Click the **Restore** button to restore the record.

If you would like to restore *all* of your archived volunteer records at once, you can. [Help topic 2038 \[pg:0889\]](#) explains how.

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## How do I track volunteer training?

Help topic 2149

Added or revised 04-04-2005

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**Question:** How do I track volunteer training?

Some of our volunteers participate in volunteer training programs. How can I track which training programs or classes volunteers have attended?

**Answer:** There are two ways you can track volunteer training using the Volgistics History tab.

For training activities that are required for certain (or all) volunteers, or that must be repeated periodically, it's usually best to create a Checklist item for the training course and then use the Checklist to manage who has completed the course and who currently needs to complete it. Examples of training activities you might track as Checklist items include 'Orientation' and 'Life safety training' (because they are often a requirement for all volunteers); and 'CPR' (because the training must be renewed periodically).

If you track training activities using the Checklist, you can record the name of the training event, the date it was last completed (if it was), and the date it next expires (if it expires). You can also use the Tickler to get lists of volunteers for whom a specific training activity is due, or will soon expire.

If you choose to track your training activity using the Checklist features, you create the training events as you would any other Checklist item.

The second way to track training is in the Dates box on the History tab. This is usually best for training events that are not required for all volunteers and that do not need to be repeated periodically. Examples of training activities you might track in the Dates box would be 'public speaking,' 'instructor training,' and 'crisis intervention.'

When you track training classes in the Dates box on the History tab, you can pre-register volunteers for training events, and track whether or not they attended, and the date they attended.

These are some of the differences between using the Checklist and the Dates box for tracking volunteer training:

1. The system supports a limited number of Checklist items, but you can track as many different training events as you would like if you track them in the Dates box.

2. Use can use the Tickler feature to manage who needs to complete a particular course when you track training events on the Checklist, but not when you track them in the Dates box.

Here's how you track volunteer training activities in the Dates box on the History tab:

Start by adding the training activities you want to track to the 'Class Event' drop-down list on the History tab:

1. Choose Setup from the [menu \[pg:0215\]](#) and then select 'Field options.'

2. Select 'History tab.'

3. Select the 'Class event' field.

4. On the Field Properties page for the 'Class event' field, enter the name of a training activity in the 'Add a new item' field and then click the **Save** button. Repeat this step for each different training activity you want to track.

5. Click the **Save** button at the bottom of the Field Properties window when you're finished adding the training events you want to track (you can always return here and add more later).

Now you're ready to start recording training for volunteers. Here's how you would enter a training record for an individual volunteer:

1. Choose Volunteers from the [menu \[pg:0215\]](#) and then locate the volunteer's record.

2. Click on the History tab for the selected volunteer.

3. If necessary, scroll down until you see the 'Dates' box. Use the 'Add' section of the 'Dates' box to add a new training record:

- a. In the "Add a" drop-down field, select 'Class'

- b. In the "Event" drop-down field, select the class the volunteer attended. (If the class you want to add does not appear in the "Event" drop down list, follow the instructions above for adding training activities to the Class Event drop down).

- c. Enter the date the volunteer attended the class, and – if there is one – an expiration date for the training.
- d. In the "Notation" drop down list select "Attended" to show that the volunteer attended the selected class.
- e. Click the **Save** button. The new training entry now appears in the Dates box on this volunteer's History tab.

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## How do I pre-register volunteers for training events?

Help topic 2150

Added or revised 04-04-2005

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**Question:** How do I pre-register volunteers for training events?

We have training events for which volunteers must pre-register by phone. How can we track these pre-registrations, and then produce rosters to show which volunteers have registered for a given course.

**Answer:** You can pre-register volunteers for training events using the Volgistics History tab.

Here's how to do this using the History tab:

If you haven't done so already, start by adding the training activity you want to pre-register for to the 'Class event' field on the History tab. For step-by-step instructions on how do this visit [How do I track volunteer training? \[pg:1853\]](#).

When a volunteer calls to pre-register:

1. Choose Volunteers from the [menu \[pg:0215\]](#) and then locate that volunteer's record.
2. Click on the volunteer's History tab
3. If necessary, scroll down until you see the 'Dates' box. Use the 'Add' section of the 'Dates' box to add the registration:
  - a. In the "Add a" drop-down field, select 'Class'
  - b. In the "Event" drop-down field, select the class the volunteer is pre-registering for.
  - c. Enter the date of the class.
  - d. In the "Notation" drop down list select "Registered" to show that the volunteer is registered for the class.



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## Using Volunteer Numbers

Help topic 2152

Added or revised 02-14-2012

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Each volunteer record has a unique number, stored in the Number field on the Core tab in the volunteer record. This number is commonly referred to as the 'volunteer number' or the 'PIN number.'

### Bailey, Harry

The screenshot shows the 'Core' tab of a volunteer record for Harry Bailey. The record includes fields for Last name (Bailey), First name (Harry), Middle name, Nickname (Harry), Title (Mr.), and Type (Community Volunteer). The Number field is set to 4321 and is circled in red. The Status is Active. Navigation buttons include Save, Cancel, Archive, Delete, Combine, Tagged, New, Previous, and Next.

Whether or not you use this number field is up to you. Unless you use the optional VicTouch module, there is no reason that you **must** assign volunteer numbers (if you use VicTouch, there is more information about assigning PIN numbers later in this help topic).

Some organizations assign volunteer numbers to coincide with numbered id- cards or badges, or to make it easier for volunteers to log their hours on manual time sheets.

You do not need to use numbers for the purpose of looking-up volunteer records in Volgistics. If you choose not to use volunteer numbers (and even if you do), you can look-up and identify volunteers by their name as easily as you can by number.

### Hiding or un-hiding the number field

If you want to use volunteer numbers, but you don't see the Number field on the Core tab, it may currently be hidden. On the other hand, if you see the number field on the Core tab but you don't need to use it, you can hide it.

To do this:

1. Choose Setup from the [menu \[pg:0215\]](#).
2. Select 'Field options'
3. Select the 'Core tab link. This lists all of the fields on the Core tab.
4. Select the 'Number' field. This opens the Field Properties page.
5. On the Field Properties page, change the 'Hidden' field to "Yes" or "No" to suit your needs.

If you're un-hiding the number field: while you're on the Field Properties page examine the "System Operator rights." Be sure that the Volgistics System Operators you expect to enter volunteer numbers have "View and change" rights to the Number field.

6. If you made changes to the Field Properties page click the **Save** button.

### **Entering volunteer numbers**

If you choose to use volunteer numbers, you can either enter your own volunteer numbers or let Volgistics assign them for you.

Volgistics will automatically assign a unique volunteer number to every new record you add if you simply leave the volunteer number field blank on the new record. Volgistics assigns non-sequential 4 to 6 digit volunteer numbers by default (If you use VicTouch, random numbering provides better security than sequential numbering). You can also [customize the way Volgistics assigns numbers automatically \[pg:1015\]](#).

If you want to enter your own volunteer numbers, simply enter the number of your choice in the Number field when you add new volunteer records. Volunteer numbers may be up to 9 digits long, and they must contain numbers only (no letter characters, spaces or punctuation). Volunteer numbers cannot have "leading zeros" (for example, "000123" would be changed to "123").

If you enter your own volunteer numbers you must assign a unique number to each volunteer. No two volunteer records can have the same volunteer number. If you try to save a volunteer record with a number that is already in use, Volgistics will ask you to choose a different number before saving the record.

If you archive a volunteer record, it keeps its' volunteer number in the archive. Therefore you cannot re-use a volunteer number that is assigned to a volunteer whose record has been archived. You can re-use numbers from volunteer records you have deleted.

You can change the number on any volunteer record simply by entering a new number in the Number field and then saving the record.

If you receive on-line volunteer application forms, Volgistics automatically assigns a volunteer number to each new volunteer record. If you want to use your own numbering system, enter new numbers for these volunteer records after you receive them.

### **Let Volgistics do the counting**

Some organizations try to use volunteer numbering as way of determining how many records they have in their database; or as an indicator of which Site or volunteer group a volunteer belongs to.

These schemes are not recommended because they are usually difficult to implement and maintain; and they are almost always un-necessary because Volgistics can perform these tasks for you. Rather than trying to make volunteer numbers do these things, you should use the built-in Volgistics features designed to do them. For example, it's easy to get a [count of the number of volunteer records \[pg:1867\]](#) or [Manage Site Level Access \[pg:0092\]](#) without any special volunteer numbering scheme.

### **VicTouch PIN numbers**

If you use the optional VicTouch module, volunteers sign-in and out at VicTouch using their volunteer number (this is often called their PIN number).

With VicTouch, there are two main ways to assign PIN numbers:

- You can let Volgistics assign volunteer numbers as you add new volunteer records, and then give these numbers to your volunteers. This may be the easiest approach for you, however it means that volunteers will have to learn and remember a new number (or carry it with them).

- You can assign each new volunteer a number that you choose (either by entering a number when you first enter their record, or by changing the number that Volgistics assigns to another number you choose).

However you choose to assign PIN numbers for VicTouch, you'll need to give each volunteer their number at some point during their registration process (e.g. during their orientation) so they'll be able to start signing-in and out.

### Related help

[Help Topic 2247 \[pg:1015\]](#) - Automatic volunteer numbers

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## Update Youth Volunteers upon Adulthood

Help topic 2160

Added or revised 04-18-2017

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In many organizations, tracking whether the volunteer has reached adulthood is important. For example, a festival may have jobs that only volunteers who are 21 years old can perform. Or, a hospital may have requirements that apply to volunteers who are over 18 that do not apply to younger volunteers. Each organization will have its own standards for the age that a volunteer is considered an adult.

There are various ways to track if the volunteer is a youth or adult, but the two most common ways are to use a [Type or a Flag \[pg:0212\]](#). The Type option allows you to create mutually exclusive categories such as Adult or Youth. The Flag option allows you to place a Flag (such as Minor or Underage) on records to identify youth volunteers.

Whichever method is used, Volgistics will not automatically update a volunteer's Type or Flag when the volunteer reaches adulthood. However, this help topic shows how you can easily identify which volunteers have reached the age threshold and need to have their record updated.

*This process will only work if you include the year of birth in the [Date of Birth \[pg:1861\]](#) field so the system automatically updates the volunteer's age when their birthday arrives.*

### Create a Set to Identify the Volunteers Who Need to Be Updated

The first step is to make a [Set \[pg:0858\]](#) to identify volunteers who are now at the adult age, but still have the youth identifier. Here is how you can make this Set.

1. Select Sets from the [menu \[pg:0215\]](#).
2. Click the **Create a new set** button.
3. Enter a name (such as *Update Type to Adult*) in the *What would you like to call this set?* field.
4. Select *Their age* from the dropdown list under *Include volunteers in this set based on*, and then click the **Go** button.
5. Configure your Set rule to be *Their age is 18 and older*. (Use 21, or whatever age your organization considers a volunteer to be an adult, if it is different than 18.)
6. Select *Their type* or *Their flags* (whichever method you use to identify underage volunteers) from the dropdown list under *Add another rule based on*, and then click the **Go** button.
7. Configure your Set rule to find the youth volunteers. For example, if you have a Type called Youth, your rule will be *Their Type is Youth*. Or, if you have a Flag called Minor, your rule will be *Their Flags include any of these* and the box in front of Minor will be checked.

8. Under *This set has 2 rules*, be sure *Include volunteers in this Set only if they pass every one of these rules* is selected.

9. Click the **Finished** button.

### Setup an Automatic Report to Show the Volunteers in the Set

Now that you have your Set, you can make a report that will run automatically every week or every month. This will remind you to update the records, and it will show you which volunteers have had birthdays and need to be updated. Here is how you can create this report:

1. Select Print from the [menu \[pg:0215\]](#).
2. Expand the *Volunteer list* link.
3. Select *Create a new volunteer list report*.
4. On the Options tab, select how you want the report to be sorted.
5. On the Fields tab, select which fields you would like on the report such as one of the name choices, and the Type, Flag, or Date of birth fields.
6. On the Include tab, select if you'd like the report in PDF or Excel format. Then, scroll to the bottom and check the box by *This set*. Select the name of the Set you created from the dropdown list.

The screenshot shows a section titled "Set" with a checked checkbox labeled "This set:". Below the checkbox is a dropdown menu currently displaying "Update Type to Adult". To the right of the dropdown are four buttons: "Help" (a blue link), "Back", "Next", and "Cancel".

7. On the Save tab, give the report a new name such as *Volunteers to Update*. Under *Would you like this report to run on an automatic schedule?* select to run the report on a certain day of each month, or on a certain weekday if you'd like the report once per week.

The screenshot shows a section titled "Would you like this report to run on an automatic schedule?". There are three radio button options: "No, do not print this automatically", "Yes, print it on the 1st of each month", and "Yes, print it every Monday". The "Yes, print it every Monday" option is selected. Below these options is a "Send it to:" field with a dropdown menu showing "Sample Account, Operator". At the bottom right are five buttons: "Help" (a blue link), "Back", "Save", "Save and Print", and "Cancel".

8. Click the **Save** button.

### Use the Report to Update Your Volunteer Records

The report will be on the [In Box \[pg:0303\]](#) tab of your Volgistics mailbox on the day it is scheduled to be run. You can now open it and use it as a resource to [locate the volunteer records \[pg:1840\]](#) that need to be updated. After you change the Type on the record to be an adult, or you remove the Flag that identified the volunteer as underage, the volunteer will not be on the report the next time it is run because they will no longer be included in the Set.

If you use the Type option to identify adult volunteers, you can quickly change the Type for all the volunteers that need to be updated at once by using the **Tags** [pg:1529] feature. If you use the Flag option, you will need to remove the Flag from each record individually. Here are the steps to change the Type for all volunteers at once by using Tags:

1. Select Tags from the **menu** [pg:0215].
2. Click the **Clear all tags** button. This will ensure that Types are not accidentally changed for volunteers who may already be tagged in your session. If the button is grayed out, there are not any tagged records to clear.
3. Select Volunteers from the menu.
4. Select the name of the Set you created from the Set dropdown list. Be sure the other dropdown lists are set to Any. Then, click the All link to the right of the row of letters.

## 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](#)

### Include

Status:

Type:

Flags:

Set:

Tags:

Kind:

[↑ Clear](#)

5. Click the **Tag** button to tag all the records on the page.

## 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](#)

Show  entries

Showing 1 to 12 of 12 entries

	Name	Tag	Number	Status	Typ
	<input type="text" value="Search"/>		<input type="text" value="Search"/>	<input type="text" value=""/>	<input type="text" value="Search"/>
	Becker, Anna	<input type="checkbox"/>	461	Active	Youth
	Brooks, Aida	<input type="checkbox"/>	200	Active	Youth

6. Select Tags from the menu.
7. Select Adult from the dropdown list by *Change the **Type** of all the tagged volunteer records to* and then click the **Go** button.
8. Click the **Clear all tags** button.

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## Tracking Date of Birth and Age

Help topic 2212

Added or revised 04-19-2017

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If you choose to track volunteer dates of birth, or ages, Volgistics provides fields for these on the Profile tab. There are several ways to track dates of birth, depending upon your organization's need for this information.

### If "date of birth" is required

Some organizations ask volunteers to provide their date of birth. This is often a required piece of information needed to perform background checks or confirm that a volunteer meets the age requirements for certain volunteer assignments.

If your organization collects complete dates of birth (month, day, and year) from volunteers, enter this date value in the Date of birth field on the Profile tab.

### If "date of birth" is not required

Some organizations prefer to track a volunteer's month and day of birth, but not their year of birth. This makes it possible for an organization to wish volunteers a happy birthday when their birthday occurs, without asking volunteers to reveal their year of birth (age). To enter a date of birth without the year, simply enter the month and day in the "Date of birth" field on the Profile tab without the year. For example:

3/12 (March 12th)

5/1 (May 1st)

You can use the [Birthday list \[pg:1385\]](#) feature, and [Birthday Sets \[pg:0855\]](#) to find volunteers with a birthday in a given week or month.

### Age field

When you enter a complete date of birth (with the year) in the "Date of birth" field and then save the Profile tab, Volgistics automatically calculates the volunteer's age. This calculated age appears in the Age field next to the date of birth, and it is automatically updated by the system as time goes by. This means that the age displayed in the Age field increments automatically each time the volunteer has a birthday (as long as a complete date of birth is recorded in their record).

If you do not track dates of birth, or you choose to enter dates of birth without a year, Volgistics cannot automatically calculate a volunteer's age in the Age field. In this case you may manually enter an age in the "Age" field, however Volgistics cannot automatically update the age as time passes since the date of birth is not known.

### Tracking Age Categories

If your organization prefers not to collect or track volunteer dates of birth, however you need to categorize volunteers by age group (e.g. under 18, 18 to 65, over 65), you should customize a field on the Profile tab for these categories rather than using the "Date of birth" and "Age" fields.

To customize a field for this purpose:

1. Choose Setup from the [menu \[pg:0215\]](#).
2. Select "Field options."
3. Select "Profile tab (for volunteers)."
4. Select the next unused "Spare dropdown" field. For example, if a custom name does not already appear next to the "Spare dropdown 1" field, select that field.
5. Setup the "Field properties" page as shown in the following illustration. Use the "Add a new item" field to add the actual age groups you want to track (in other words, you need not setup the same age categories used in the example).

**Field Properties** Save Cancel

**Spare dropdown**

Field location: **Profile tab**

Type of field: **Dropdown**

Field name:

Hidden:  ▼

Require an entry:  ▼

Default entry:  ▼

**Drop down table items**

Add a new item:  Save

<input type="text" value="18 to 65"/>	<span>Delete</span>	<span>Merge</span>
<input type="text" value="Over 65"/>	<span>Delete</span>	<span>Merge</span>
<input type="text" value="Under 18"/>	<span>Delete</span>	<span>Merge</span>

**System operator rights**

Volgistics Administrators:  ▼

Power users:  ▼

Basic users:  ▼

Save Cancel

6. Click the Save button on the Field properties page.

Your profile tab now includes a field for tracking age category.

Note that if you choose to track volunteer age categories in this fashion (without entering dates of birth), the system does not automatically advance a volunteer from one category to the next when their age changes (it can't because the date of birth is unknown). It's up to you to maintain this information as time passes and volunteers move from one category to the next. If you would like Volgistics to automatically track volunteer ages, you should record volunteer dates of birth as described under *If date of birth is required* above, instead.

### Finding records that are missing a date of birth

If you're interested in seeing which volunteers in your database do not have a complete date of birth, you can easily do so using a Set.

To create a Set that includes all of the volunteers without a complete date of birth (including the month, day, and year of birth) [create a new Set \[pg:0859\]](#) with a rule based on "Their age" like the one shown here:

The screenshot shows a configuration window titled "Rule" with a sub-header "Their Age". It contains five radio button options for defining a rule based on age or date of birth. The first option, "Their age is 0 and older", is selected. The other options are: "Their age is at least 0 and not more than 0", "Their date of birth is before [calendar icon]", "Their date of birth is between [calendar icon] and [calendar icon]", and "The Date of birth is incomplete in their record". A "Help" link is located in the bottom right corner.

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## International Addresses

Help topic 2276

Added or revised 07-17-2006

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If your organization has volunteers who reside in more than one country, you can configure Volgistics for tracking international mailing addresses.

By default Volgistics will track U.S. and Canadian addresses. If you would like to track addresses outside the U.S. and Canada, some Setup changes are needed. These are described in this help topic.

### Using the Country field

#### Using the Country field in volunteer addresses

Volgistics includes a field for tracking 'country' as part of mailing addresses. The Country field is hidden by default. To un-hide the Country field:

1. Choose Setup from the [menu \[pg:0215\]](#).
2. Select 'Field Options.'
3. Click on the 'Core tab' link.
4. Click on the 'Country' link.
5. On the Field Properties page, set 'Hidden' to "No."



**Field Properties** Save Cancel

**Country**

Field location: **Core tab**

Type of field: **Dropdown**

Field name: Country

Hidden: No

Require an entry: No

Default entry: None

**Drop down table items**

Add a new item:  Save

Canada	Delete	Merge
France	Delete	Merge
Germany	Delete	Merge
United Kingdom	Delete	Merge
United States	Delete	Merge

**System operator rights**

Volgistics Administrators: View and change

Power users: View and change

Basic users: View and change

Save Cancel

6. The Country field uses a drop-down list, which is empty by default. You can add the country names you want to appear in the Country drop down by entering them in the 'Add a new item' field and then clicking the **Save** button.

When it is not hidden, the Country field appears in the Address box on the Core tab for each volunteer.

**Address**

Street 1: 2454 Elm Street

Street 2:

Street 3:

City: Bedford Falls

State: IN Zip: 42345

Country: United States

Mail:  No postal mail  No email

Home: (414) 555-1286  Ok to call

Work: (414) 555-7122  Ok to call

Cell:   Ok to call

Fax:   Ok to call

Pager:   Ok to call

Other:   Ok to call

Email: hbaily@savingsandloan.com

If you use the Country field, it is not necessary for you to enter a country for every volunteer. If most volunteers live in your home country, you can omit the country entry for these volunteers. If you enter a country as part of a volunteer's address, it appears as part of the address on labels and lists. If you do not enter a country as part of the address, the Country field will not be used when the address is printed.

#### Using the Country field in other addresses

You can also include the Country field as part of the addresses tracked on these tabs:

Contacts  
Site  
Place  
Assignment  
Coordinator

To use the Country field in the addresses on these tabs, use the Field Options settings under Setup to un-hide the Country field on the selected tab.

#### Using the Country field in online volunteer application forms

If you have un-hidden the Country field for volunteer addresses using the instructions under *Using the Country field in volunteer addresses* (above), then you can also add the Country field to any of your [online volunteer application forms \[pg:0413\]](#).

To add the Country field to an application form:

1. Choose Setup from the [menu \[pg:0215\]](#).
2. Select 'Online forms.'
3. Select 'Volunteer application forms.'
4. Click on the name of application form you want to add the Country field to.
5. On the form setup page, click the 'Fields' link.
6. On the 'Fields' setup page for the selected application form, use the drop-down list next to the 'Country field' to choose the [form section \[pg:1340\]](#) where you want the Country field to appear (typically this will be same form section where the other address fields appear).
7. If you want to require an entry in the Country field, check the "Required" checkbox.
8. Click the **Save** button.

#### **Expanding the State/Province field**

If you track international addresses, the field typically used for the state or province in the U.S. and Canada may need to include entries for more than (or instead of) states and provinces, depending on the addressing standards for the nations for which you track addresses. To add additional (or different) values to the State field:

1. Choose Setup from the [menu \[pg:0215\]](#).

2. Select 'Field Options.'
3. Click the 'Core tab' link.
4. Click the 'State' field.
5. Use the "Add a new item" field to add each of the additional entries you want to appear in the State drop down list.
6. Click the **Save** button.

### Expanding the Zip/Post code field

By default, the Zip/Post code field accepts only postal codes that are properly formatted for U.S. or Canadian addresses. If you need to track postal codes with formatting other than these, you should remove the default U.S. and Canadian post code formatting requirement for this field.

1. Choose Setup from the [menu \[pg:0215\]](#).
2. Select 'Field Options.'
3. Click the 'Core tab' link.
4. Click the 'Zip' field.
5. In the "Post or zip code format" field, select "No formatting"

**Field Properties** Save Cancel

**Zip**

Field location: **Core tab**

Post or zip code format: **No formatting** ▼

Field name: Zip

Hidden: **No** ▼

Require an entry: **No** ▼

Default entry:

**System operator rights**

Volgistics Administrators: **View and change** ▼

Power users: **View and change** ▼

Basic users: **View and change** ▼

Save Cancel

---

## How can I see how many volunteer records I have?

Help topic 2282

Added or revised 12-13-2012

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To see a count of the number of records in your database:

1. Choose Volunteers from the menu.
2. Click the "Clear" link to clear any Include options that might be set, and then click "All" link near the top of the page to display the list of all records.

### 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](#)

#### Include

Status:    
Type:    
Flag:    
Site:    
Set:    
Tags:    
[Clear](#)

3. The number of volunteers appears at the bottom of the list.



Note: This count does not include Archived volunteer records.

If you are a [Volgistics administrator \[pg:0052\]](#), you can get a count of the number of volunteer records, and the number of archived volunteer records like this:

1. Choose Setup from the [menu \[pg:0215\]](#).
2. Select 'Account management.'
3. Select 'Account status.' Among other things, the Account status page shows the number of un-archived and archived records in the database.

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## Core Tab

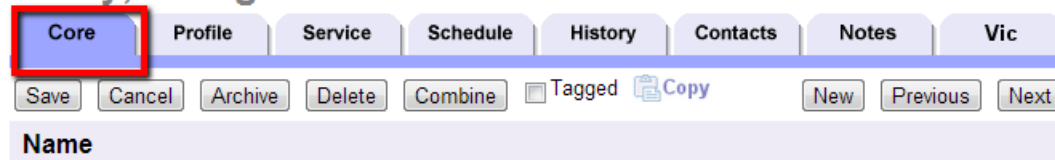
Help topic 2294

Added or revised 08-13-2014

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Every volunteer's record includes a Core tab where you record their basic information such as name, address, and other contact information. The tab also includes fields used for identifying or categorizing your volunteer records. For example, the Status, Type and Flag fields. This help topic explains how to use the fields on the Core tab.

### Bailey, George



Core Profile Service Schedule History Contacts Notes Vic

Save Cancel Archive Delete Combine Tagged Copy New Previous Next

Name

#### Please note:

The field options on the Core tab in

*your*

system may differ from those shown below. Some fields appear only when you enable certain system features. Other fields can be hidden or renamed. If your organization has custom Core tab fields not shown below, please contact your [Volgistics Administrator \[pg:0052\]](#) to find out how they are used for your organization. The Core tab is organized into 5 or 6 "boxes" depending on the kind of record it is used for. Each box contains a related group of fields. You can click a link in the *Contents* box below to be taken directly to the section of the help topic that relates to a box.

#### Contents


- Name (or Contact Name) Box
- Group Box
- Address Box
- Flags Box
- Sites Box
- Statistics Box

#### Name (or Contact Name) Box

The fields in the Name box are for recording the volunteer's most vital information: their name, Status, Type, Kind, and optionally a record number. If the record is for a group, the "Name" box is re-named "Contact Name." In this case, you record the information for the primary group contact in this box. If you also need to track contact information for secondary contacts for the group, see [help topic 1990 \[pg:1816\]](#).

## Name


Last name:

Number:  


First name:

Status:  

Middle name:  Title:  

Type:  

Nickname:

Kind:  Individual  Group 

Field	Purpose
Last name	<p>Enter the volunteer's (or group contact's) last name.</p> <p>It's best to use upper and lower case letters when you enter names. There's no benefit to entering names in all uppercase letters. Entering names with proper capitalization produces printed reports with a more professional appearance.</p>
First name	<p>Enter the volunteer's (or group contact's) first name.</p>
Middle name	<p>If it's known, enter the volunteer's (or group contact's) middle name or middle initial.</p>
Title	<p>Use the dropdown list to choose the appropriate title, such as Mr., Ms., Mrs., Dr., etc.</p> <p>If the Title you want to select does not currently appear in the dropdown list, you can add it in Setup. Help topic 2018 explains how to add new dropdown list items.</p>
Nickname	<p>If they have one, enter the volunteer's (or group contact's) preferred name or nickname. For example, a person with the legal name of "Margaret" may prefer to go by "Peggy." In this case you should enter "Margaret" in the First name field, and enter "Peggy" in the Nickname field.</p>
Number	<p>Each record has a identification number. If you use VicTouch, this is the number the volunteer uses to sign-in and out at the VicTouch station. Numbers are not required for any other purpose except to identify records internally.</p> <p>If you leave the Number field blank, Volgistics will assign a record number for you. Help topic 2152 has more information about the Number field.</p>
Status	<p>Use the Status field dropdown list to select the volunteer's (or group's) current Status. Help topic 2014 has more information about tracking statuses.</p>
Type	<p>If your organization has different types of volunteers, use the Type field dropdown list to select the type for this record. Help topic 2263 has more information about using the Type field.</p>

Kind	<p>Volgistics can be used for both Individual and Group records.</p> <p>Group records allow you to make one record in situations where you do not need to keep track of individual volunteer data. For example if a business is sending 20 volunteers to help with a park clean-up.</p> <p>If you will need to know how many service hours a specific group member contributed, or send an email message to a specific group member, they will need an Individual record.</p> <p>Help topic 1045 has more information about when and how to use Group records.</p>
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**Group Box**

This box will only appear if you select "Group" in the Kind field of the Name box. The Group box is used for recording information for the group's record.

**Group**

Group name:

Members:  (How many members in Savings and Loan Volunteers?)

Participation: If this group serves more than once, they usually send: 

The same volunteers each time

Different volunteers each time

Field	Purpose
Group name	Enter the group's name.
Members	<p>If you know how many members this group has, enter the number of people who belong to this group in the Members field. For example, if the Savings and Loan Volunteers group has 20 members, enter 20 here (even if not all 20 members will volunteer). You can leave this field zero if you're not sure how many members the group has.</p> <p>Volgistics uses the Members field along with other fields to determine unduplicated volunteer counts on service reports. You can find more information about how this works in Help topic 2115.</p>

Participation	<p>Choose the option that best describes how this group will participate if they will volunteer more than once for your organization. Volgistics uses this information when it calculates unduplicated volunteer counts on service reports. You can find more information about how this works in Help topic 2115.</p> <p>Choose "The same volunteers each time" if the group will typically send the same people each time the group volunteers. For example, if 20 group members will serve once a month, and it will most likely be the same 20 people each time.</p> <p>Choose "Different volunteers each time" if the group will typically send different people each time the group volunteers. For example, if a large company commits to send 20 volunteers each month, but the majority of the people will likely be different each time.</p>
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### Address Box

Use the fields in the address box to enter the volunteer's (or group contact's) mailing address, phone numbers, email address, and web site. If a volunteer has more than one address, use the Core tab for the address where they currently prefer to receive mail. [Help topic 2296 \[pg:1875\]](#) explains how to enter additional addresses for the same volunteer. If the record is a group record and the group has secondary contacts, use the Core tab to record the primary contact's information and the Contacts tab for the secondary contact's information. [Help topic 1990 \[pg:1816\]](#) explains how to do this.

**Address**

Street 1: <input type="text" value="320 Sycamore Street"/>	Home: <input type="text" value="(812) 555-1234"/> <input checked="" type="checkbox"/> Ok to call
Street 2: <input type="text"/>	Work: <input type="text" value="(812) 555-3300"/> <input checked="" type="checkbox"/> Ok to call
Street 3: <input type="text"/>	Cell: <input type="text" value="(812) 555-6601"/> <input checked="" type="checkbox"/> Ok to call
City: <input type="text" value="Bedford Falls"/>	Text: <input type="text" value="(812) 555-6601"/> <input checked="" type="checkbox"/>
State: <input type="text" value="IN"/> Zip: <input type="text" value="12345"/>	Fax: <input type="text"/> <input type="checkbox"/> Ok to call
Messaging: <input type="checkbox"/> No postal mail <input type="checkbox"/> No email	Pager: <input type="text"/> <input type="checkbox"/> Ok to call
<input type="checkbox"/> No text message	Other: <input type="text"/> <input type="checkbox"/> Ok to call
Email: <input type="text" value="gbailey@mailinator.com"/> <input checked="" type="checkbox"/>	
Web Site: <input type="text" value="www.facebook.com/GeorgeMBailey"/> <a href="#">Visit</a>	

Field	Purpose
Street 1 Street 2 Street 3	<p>Enter the volunteer's (or group contact's) street address in these fields. Street addresses can have up to three lines. Some street addresses use just one line, such as:</p> <p><i>123 Elm Street</i></p> <p>Others may require additional lines. For example:</p> <p><i>Bradford Arms Apartments 3416 North Broadway</i></p>



City	Enter the city for the volunteer's (or group contact's) address.
State/Province	<p>Use the dropdown list to choose the volunteer's (or group contact's) state or province.</p> <p>If the state or province you want to select does not currently appear in the dropdown list, you can add it in Setup. Help topic 2279 explains how to add new entries to the State or Province fields.</p>
Zip/Post code	Enter the volunteer's (or group contact's) zip or postal code.
Country	<p>Use the Country field to choose a country if needed.</p> <p>If the country you want to select does not appear in the dropdown list, you can add it in Setup. Help topic 2018 explains how to add new dropdown list items. If you don't need to use the Country field, you can hide it. Help topic 2017 explains how to hide fields.</p>
Messaging	<p>It's possible to prevent postal mail, email and/or text messages from being sent for a record. This feature is useful in situations where you do not want a person who has been separated from your organization to receive mail, while still maintaining their record in your database.</p> <p>Check "No postal mail" if you want to prevent postal mail from being sent for this record. When you check "No postal mail," this record will not be included in any address labels you print from Volgistics.</p> <p>Check "No email" if you want to prevent email messages from being sent for this record. When you check "No email," this record will not be included in any email you send from Volgistics.</p> <p>Check "No text message" if you want to prevent text messages from being sent for this record. When you check "No text message," this record will not be included in any text (SMS) messages you send from Volgistics. The "No text message" field will not appear unless your account has enabled text messaging <i>and</i> the volunteer has access to VicNet.</p> <p>Note that changing a record's Status field to <i>Inactive</i> is generally all you need to do to remove a person from routine mailings, email and text messages. As long as you typically select to send mailings and emails to only records with the <i>Active</i> Status. In this case, it's normally not necessary for you to also check the "No postal mail," "No email" or "Not text message" checkboxes on a record. Instead, these checkboxes are intended for situations where you want to explicitly prevent mail, email or text messages from being sent. For</p>

Email	<p>Enter the volunteer's (or group contact's) email address here. This is the email address at which this record will receive email you send through Volgistics. If you use VicNet, the person will use the email address entered here to login with.</p> <p>The icon that appears as a square beside the email address lets you know if the address is known to be a good or bad email address. If no information is available on this because messages have not been sent to the address yet, the square appears blank or unfilled. The color of the square indicates the address's validity. You can get additional information by placing your cursor over the icon. Help topic 2065 explains more about email address validity.</p>
Web site	<p>or volunteers who have a personal web page, or profiles on web sites such as Facebook or Twitter, you can enter their URL address here. You can enter the URL address for an organization's web site here for group records.</p> <p>When a valid web page address has been saved in this field, a "Visit" link to that web page will appear next to the field if the link has been enabled on the Web site field's properties page. To get to this page, choose Setup from the menu, select "Field options," "Core tab," and then "Web site." When this link is enabled, clicking on it will take you to the URL address recorded in the Web site field.</p>
Home Work Cell Text Fax Pager Other	<p>Enter the appropriate phone numbers for the volunteer (or group contact) in these fields. Volgistics provides fields for all common types of phone numbers. You can change the format for phone number fields if your geographic area uses a different format, or you need to add phone number extensions.</p> <p>The Text field will not appear unless your account has enabled text messaging <i>and</i> the volunteer has access to VicNet. Because text messaging can cost a volunteer money depending on his or her plan, there is not a way for System Operators to edit this field. If the phone number for this field needs to be updated, the volunteer must opt-out of messaging and then opt-in with the new number.</p> <p>The icon that appears as a square beside the Text field lets you know if the number is known to be valid or not. If no information is available on this because messages have not been sent to the number yet, the square appears blank or unfilled. The color of the square indicates the number's validity. You can get additional information by placing your cursor over the icon. Help topic 1292 explains more about Text number validity.</p>
Ok to call	<p>Use the Ok to call checkboxes to show which of a volunteer's (or group contact's) phone numbers are okay to call for routine business.</p>


## Flags Box

Use the Flags field to mark or "flag" this record for the specific category (or categories) it belongs to. To choose a Flag, select it from the dropdown list and then click the **Save** button. A record can have multiple flags if it belongs to multiple categories. The flags for a record are all listed in the Flags box, as shown here:



Flags

Auxiliary	Delete	Green Team	Delete
RSVP	Delete		

Flag:  Save 

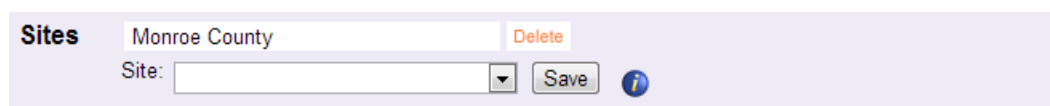
To remove a Flag from a record, click the orange "Delete" link next to the Flag name.

You can skip the Flag field if this record does not currently need any flags.

[Help topic 2263 \[pg:0212\]](#) has more information about using Flags in your account. Please note that Flags are a permanent way to mark a record while [Tags \[pg:1529\]](#) are a temporary way to mark a record. [Help topic 2140 \[pg:1541\]](#) explains more.


## Sites Box

If you use [Site Level Access \[pg:0092\]](#), the Site box appears on the Core tab. The Site box does not appear on the Core tab otherwise. You use the Site field to choose the Site (or Sites) this volunteer serves at. [Site-Level Operators \[pg:1442\]](#) will only see volunteer or group records when the same Site is on the record as they have on their System Operator record. [Help topic 2037 \[pg:0094\]](#) explains more about how to use the Site field on the Core tab.



Sites

Monroe County	Delete
---------------	--------

Site:  Save 

## Statistics Box

The Statistics box on the Core tab displays key statistical information about the selected volunteer or group. You don't actually enter anything in the Statistics box. Instead the Statistics box summarizes important statistics (such as service hours and years of service) based on other information entered elsewhere in the volunteer's record. The Statistics box gives you a snap-shot of this volunteer's or group's participation.



Statistics	Life:	YTD:	MTD:
Hours:	1,711:00	119:30	0:00
Years of service:	12 years		
Date of last activity:	04-01-2012		

You can find information on how these fields are determined in the following help topics:

[Help topic 2259 \[pg:0076\]](#) - Date of Last Activity

[Help topic 2261 \[pg:0077\]](#) - Years of Service

You can also find information on how to customize the Statistics box in [help topic 2260 \[pg:1387\]](#).

## Save button

Always click the **Save** button to save additions or changes you've made on the Core tab. A **Save** button appears at both the top and the bottom of the Core tab for convenience. You may click either to save your entries.

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## Tracking Multiple Addresses (and Other Information) for the Same Volunteer

Help topic 2296

Added or revised 12-13-2012

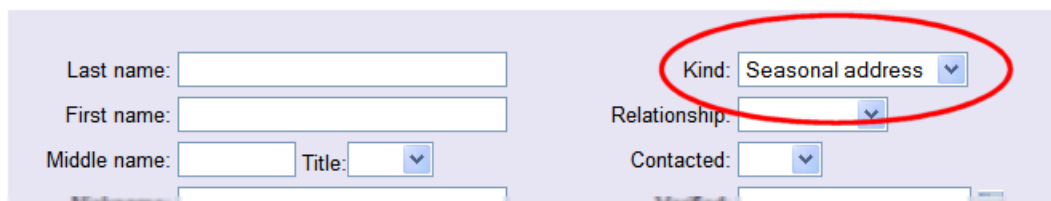
---

Use the **Core tab** [pg:1868] in the volunteer record to store each volunteer's mailing address. This may be a home or a business address. When you print address labels or address lists, Volgistics uses the address on the Core tab as the volunteer's mailing address.

If a volunteer has more than one address, such as a home address and a business address, you can store their additional addresses on the Contacts tab in their record. You can also use this tab to store other information for the volunteer.

To add an additional address (or other information) for a volunteer:

1. Choose Volunteers from the **menu** [pg:0215].
2. Open the record for the volunteer for whom you want to add additional information.
3. Click the Contacts tab.
4. Click the **Add a new contact** button.
5. Skip the name fields, and then select the kind of address you're entering from the Kind field dropdown. For example "Seasonal address," "Business address," or "Home address." If your Kind field does not include these options, see the sidebar below for instructions on how to add them.



The image shows a portion of a web form for adding a new contact. On the left, there are input fields for 'Last name:', 'First name:', 'Middle name:', and 'Title:'. On the right, there are dropdown menus for 'Kind:', 'Relationship:', and 'Contacted:'. The 'Kind:' dropdown is highlighted with a red oval and is currently set to 'Seasonal address'.

6. Use the address fields to enter the address. Enter any other information you want to save in the appropriate fields.

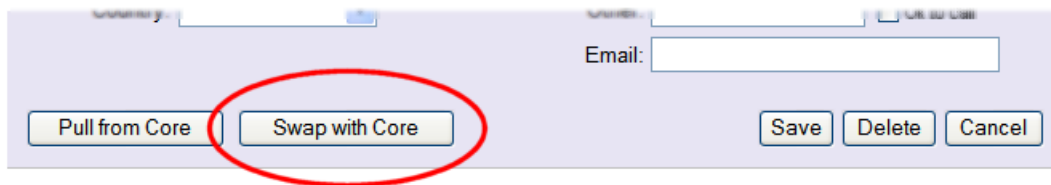
7. Click the **Save** button.

## Managing seasonal addresses

If you have volunteers who live in your community on a seasonal basis (e.g. "snowbirds"), enter their local address on the Core tab and their "Seasonal address" on the Contacts tab, as described above. Then when the volunteer departs for the season, click the **Swap with Core** button next to their "seasonal address" on the Contacts tab. When you click the **Swap with Core** button, the address, phone numbers, and "Ok to call" fields

on the Core tab are swapped with these fields on the Contacts tab. Repeating this process when the volunteer returns restores the local address, phone numbers, and "Ok to call" fields to the Core tab.

This technique is optional, however if you do this you can easily keep in touch with seasonal volunteers during the periods they are away.



### How to add contact kinds for additional addresses

When you use the Contacts tab to record additional addresses for a volunteer, you can use the Contact "Kind" field to indicate what kind of additional address you're entering. For example, it might be a Seasonal address, Business address, or a Home address. If the "Kind" dropdown list does not include these selections, you can add them like this:

1. Choose Setup from the [menu \[pg:0215\]](#).
2. Select "Field Options."
3. Select "Contacts tab."
4. Click the "Kind" link.
5. On the Field Properties page, enter the address kind (e.g. "Seasonal address") in the "Add a new item" field.
6. Click the **Save** button.

### Related help

- [Help Topic 1059 \[pg:1346\]](#) - Contact Fields on Application Forms
- [Help Topic 1990 \[pg:1816\]](#) - Tracking Multiple Contacts for a Group
- [Help Topic 2011 \[pg:1828\]](#) - Tracking References
- [Help Topic 2012 \[pg:1829\]](#) - Tracking Emergency Contacts
- [Help Topic 2013 \[pg:1830\]](#) - Tracking Employers
- [Help Topic 2017 \[pg:0957\]](#) - Field Setup
- [Help Topic 2018 \[pg:0963\]](#) - Manage Dropdown Lists (Look-up Tables)
- [Help Topic 2294 \[pg:1868\]](#) - Core Tab
- [Help Topic 2296 \[pg:1875\]](#) - Tracking Multiple Addresses (and Other Information) for the Same Volunteer
- [Help Topic 8011 \[pg:0610\]](#) - Volunteer Contacts List (stock)

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## Adding Volunteer Records

Help topic 2298

Added or revised 06-20-2013

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There are several different ways you can add volunteer records to your database. You can convert volunteer records from other computer files, you can collect new volunteer records through online volunteer application forms, or you can enter them manually. [Help Topic 2299 \[pg:1878\]](#) explains more about this.

This help topic shows you how to add new volunteer records manually.

To add a new volunteer record manually:

1. Choose Volunteers from the [menu \[pg:0215\]](#).
2. Click the **New volunteer** button.

### 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](#)

#### Include

Status:

Type:

Flag:

Site:

Set:

Tags:

[↑ Clear](#)

#### Find

Find from within all volunteer records

Last Name:

First Name:

Number:

Email:

3. Enter the name and address of a new volunteer on the Core tab. [Help Topic 2294 \[pg:1868\]](#) explains how to use the Core tab in detail.

When you enter a new volunteer record, pay attention to the *Status* you choose on the Core tab. If you're entering a record for a volunteer who is already active, select the "Active" Status. If you have an application procedure for new volunteers, and the person you're entering a record for has not yet completed that procedure, you would probably make their Status "Applicant" instead (you can change their Status to "Active" once they've completed your application procedure).

If the record you're adding is for a group instead of an individual, refer to the *Entering and Finding Group Records* section of [Help Topic 1045 \[pg:1802\]](#) for additional help.

4. Click the **Save** button to save the new record.

You've now added a new volunteer record. From here you can continue entering information on the other tabs, and start tracking the new volunteer using features such as the Checklist. You'll learn more about how to do these things later. You may find [help Topic 2024 \[pg:1849\]](#) helpful to do this.

### Related help

[Help Topic 1045 \[pg:1802\]](#) - Tracking Groups

[Help Topic 2024 \[pg:1849\]](#) - Volunteer Record Organization

[Help Topic 2294 \[pg:1868\]](#) - Core Tab

[Help Topic 2299 \[pg:1878\]](#) - How volunteer records get into Volgistics

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## How Volunteer Records Get Into Volgistics

Help topic 2299

Added or revised 03-12-2014

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Your Volgistics database will include a record for each volunteer you want to track. These are known simply as *volunteer records*. You can add volunteer records to your database through any combination of...

- Data conversion from another database
- Online volunteer application forms submitted by prospective volunteers
- Manual data entry

Let's take a closer look at these three options

### Data conversion

If you already have volunteer information in a computer database, there's a good chance that you can transfer some, or all, of it directly into Volgistics using one of the three data conversion tools described here. These tools can transfer the most common kinds of volunteer data; however, there may be some specialized data you won't be able to transfer automatically. In some cases, you might use one of these data conversion tools to transfer the bulk of your data, and then add the remaining pieces manually yourself.

**If you're just getting started with Volgistics, and you have information you want to convert from another database, it's best to do this before you begin collecting online volunteer application forms or entering volunteer records manually.**

Completing a data conversion before you start adding records from other sources will make it possible for you to clear your Volgistics database and re-run a conversion again if you find you don't care for your first conversion attempt. If you've already started adding other volunteer records, you would lose them if you cleared your account and ran the conversion again. Note that you can clear your account of all volunteer data without losing setup options, [System Operators \[pg:0065\]](#), and other customizations you have already made. [Help Topic 2112 \[pg:0890\]](#) explains more about this.

The three conversion tools available are the *Import Utility* program, the *Jump-Start* service, and the *VolunteerWorks Conversion Utility* program.

#### Free Import Utility

Volgistics offers a free Import Utility program you (or someone in your organization) can use to convert data yourself. The program can read data from any tab or comma delimited text file. These are often called CSV files. If your records are currently in a program that stores data in a format other than CSV, you may be able to export it or save it as a CSV file, or a spread sheet file. Spread sheet files can usually be saved as CSV files.

There's more information about the free Import Utility (plus the link to download it), at <https://www.volgistics.com/Import-Utility.htm>.

You run the free Import Utility program at a computer that has Microsoft Windows.

#### Jump-Start Service

If you would rather not run your own data conversion, Volgistics can perform your data conversion for you through the Jump-Start service. There is a service fee (usually \$500 but this depends on several factors such as the number of different databases you want to convert). While conversions are often completed in a matter of days, you should allow up to three weeks for a conversion under this service.

To use the service, you send your current volunteer database files to Volgistics through a secure data upload page. Volgistics checks to make sure they can convert your data and lets you know what the conversion service fee will be. Once you've paid the service fee, Volgistics performs the conversion and places your converted information right into your Volgistics account.

There are some limitations to the kinds of information Volgistics can convert through this service, but it usually allows more detailed records to be transferred than the Import Utility program. You can learn more about the Jump-Start service at <https://www.volgistics.com/jump-start-service.htm>.

#### VolunteerWorks

If you use the VolunteerWorks program, an integrated data conversion utility for moving your volunteer data into Volgistics is available in VolunteerWorks version 3. You can run this yourself from within VolunteerWorks and it transfers nearly every kind of information from VolunteerWorks directly into your Volgistics account. You must run the conversion from a computer that has an Internet connection. There is more information about how to do this at <https://www.volgistics.com/VolunteerWorks-Conversion.htm>.

If you'd prefer not to perform the conversion yourself, Volgistics can complete the process for you. You can find information on how to do this in [Help topic 1196 \[pg:0035\]](#). There is no charge for Volgistics to do this for you.

[Help topic 2006 \[pg:0047\]](#) may also be helpful no matter which conversion option you choose.

#### **Online volunteer application forms**

Another way to get new volunteer records into Volgistics is through online volunteer application forms. Creating an online volunteer application form with Volgistics is as easy as configuring a few setup options and then adding a simple HTML link on your web site.

[Help topic 2121 \[pg:0413\]](#) explains more about how to setup and use application forms. For now, know that you can customize online application forms to suit specific information requirements, offer web visitors links to your application form at your own web site, and audit new application submissions before receiving them into your Volgistics database. You can even create different application forms for different purposes (for example, one for adult volunteers and one for youth volunteers).

Once you've elected to receive a new application, the information the applicant entered online goes directly into your database as a new volunteer record. Volunteer records you receive this way can have a [Status \[pg:1832\]](#) of *Applicant* so they're easily distinguished from your other volunteer records.

While you don't have to use online application forms in your account, they are a great way of gathering information from prospective volunteers without having to enter it manually.



## Manual data entry

The last way to get new volunteer records into Volgistics is simply to add them manually. Volgistics makes data entry quite easy. You can start by entering just basic information—such as name and address—and then [add more information \[pg:1849\]](#) to the record as you collect it. [Help Topic 2298 \[pg:1877\]](#) explains how to enter volunteer records manually.

## Use any combination of these methods

You can use all three of these methods (or any combination of them) for getting volunteer records into your database. For example, you might start by converting your existing volunteer records from another database. Then you could collect new volunteer records through a combination of the online volunteer application forms (for people who choose to apply online), and manual data entry (for people who apply in person or by way of a paper form). No matter how a volunteer record gets into your database—through a data conversion, an online application form, or manual data entry—you can always add more information to the record (or edit the record) any time, through a variety of methods.

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## Delete Volunteer Records

Help topic 2309

Added or revised 12-11-2015

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If your Volgistics [System Operator \[pg:0065\]](#) rights permit, you can delete volunteer records from Volgistics whenever necessary. You can click on a link in the *Contents* box below to go directly to a particular section of this help topic.

### Contents

[Important Considerations Before Deleting Records](#)

[To Delete a Single Volunteer Record](#)

[To Delete Multiple Volunteer Records](#)

[Site-Level Operators and Deleting Records](#)

[Remove a Deleted Record Before the 5 Day Hold Period Ends](#)

**[Important Considerations Before Deleting Records](#)**

- **Deleted volunteer records can only be restored for 5 calendar days after they are deleted.**
- If 5 days pass and the record has not been restored, it will be permanently deleted from the system. There is not a way to "un-do" the deletion at this point. You can find information on how to restore a deleted record during the 5 day hold period in [help topic 2311 \[pg:1888\]](#). *Please note that there is not a way to restore the schedule for a deleted record that has been restored.*
- There may be instances where you need to permanently delete a record before the 5 calendar day hold period ends. If you need to do this, see the [Remove a Deleted Record Before the 5 Day Hold Period Ends](#) section at the bottom of this help topic.
- Any service records associated with the record you delete are also deleted. This means that any volunteer service performed by the volunteer whose record you delete will no longer appear on any service reports, or in the cumulative hour total for your account. The service information not appearing on reports may not matter to you if the volunteer service associated with the record you delete has already been reported on prior year service reports, and you no longer need a record of their service detail. For example, if the record you're deleting only has service records through 2013, and you have already printed 2013 year end reports, deleting service entries from 2013 or earlier may not affect future reporting. However if the record you want to delete includes service records for the current fiscal or calendar year, you should not delete the record until after you print any year end service reports you need (consider archiving the record until then).

- If you want to remove a record from your database but you don't want to delete it, you can [archive \[pg:1819\]](#) it instead. Volunteer service associated with archived volunteer records

will

always appear on service reports, and in the cumulative hour total for your account, even while the volunteer's record is in the archives. [Help topic 1997 \[pg:0442\]](#) has more information on this.

- If you discover that you have two (or more) volunteer records for the same volunteer, you can use the **Combine** button on the Core tab to [combine \[pg:1884\]](#) the records rather than deleting one of them. Records deleted through combining cannot be restored.

### To Delete a Single Volunteer Record

1. Choose *Volunteers* from the [menu \[pg:0215\]](#).
2. [Locate the volunteer record \[pg:1840\]](#) you want to delete, and then open it to the [Core tab \[pg:1868\]](#).
3. Click the **Delete** button near the top of the Core tab.

## Thomas, Jill

### Operator Rights and Deleting Records

If you do not see a **Delete** button on the Core tab, your [Volgistics System Operator rights \[\\_\\_\\_\\_\\_\]](#) do not permit you to delete volunteer records. Your System Operator rights are set by your organization's [Volgistics Administrator \[pg:0052\]](#).

4. A dialog box will appear to confirm that you would like to delete the record. If the volunteer has [VicDocs \[pg:1648\]](#) documents stored, the box will have an option to download the documents when you delete the record. When you choose this option, the volunteer's VicDocs will be placed in a zip file and sent to the [In Box \[pg:0303\]](#) of your Volgistics mailbox. *You must save the zip file to your local computer within 5 days.* The document download is deleted automatically when the volunteer's record is permanently deleted.
5. If you'd like to proceed with deleting the record, click the **OK** button in the dialog box. Otherwise, click the **Cancel** button to close the dialog box without deleting the volunteer.

### To Delete Multiple Volunteer Records

You will use the [Tags \[pg:1529\]](#) feature to delete multiple volunteer records. Because tags are cumulative during your [session \[pg:1589\]](#), we recommend **always** clearing your tags before deleting multiple records. This will reduce the chance that records are unintentionally deleted. To clear all records currently tagged for your session, select *Tags* from the [menu \[pg:0215\]](#) and click the **Clear all tags** button. If the button appears grayed out, there are not any tagged records to clear.

To delete multiple volunteer records:

1. Tag the volunteer records [pg:1538] you need to delete.
2. Select *Tags* from the menu [pg:0215].
3. Click the **Go** button beside *Delete the tagged volunteer records*.

Change the **Status** of all tagged volunteer records to:

Change the **Type** of all of the tagged volunteer records to:

Add this **Flag** to all of the tagged volunteer records:

**Delete** the tagged volunteer records:

**Archive** the tagged volunteer records:

Reset and send the temporary **VicNet password message** to the tagged volunteer records:  Auto generate  Set as PIN  Set to:

### Operator Rights and Deleting Records

If you do not see the *Delete the tagged volunteer records* option on the Tags menu, your Volgistics **System Operator rights** [ ] do not permit you to delete volunteer records. Your System Operator rights are set by your organization's **Volgistics Administrator** [pg:0052].

4. A dialog box will appear to confirm that you would like to delete the tagged records. If any of the tagged volunteers have **VicDocs** [pg:1648] documents stored, the box will have an option to download the documents when you delete the record. When you choose this option, the volunteers' VicDocs will be placed in a zip file and sent to the **In Box** [pg:0303] of your Volgistics mailbox. *You must save the zip file to your local computer within 5 days.* The document download is deleted automatically when the volunteer records are permanently deleted.

5. If you'd like to proceed with deleting the tagged records, click the **OK** button in the dialog box. Otherwise, click the **Cancel** button to close the dialog box without deleting the volunteers.

### Site-Level Operators and Deleting Records

*If you use the Site Level Access* [pg:0092] feature in your account, you should note how this affects volunteer record deletions.

If a **Site-Level Operator** [pg:1442] is allowed to delete volunteer records, and they choose to delete a volunteer record for a volunteer that serves *only* at their own Site, the volunteer record is deleted.

If a **Site-Level Operator** [pg:1442] is allowed to delete volunteer records and they choose to delete a volunteer record for a volunteer that **serves at multiple Sites** [pg:0094], the volunteer record will no longer be associated with the Site where they have been deleted (and therefore appear to have been deleted from that Site's database). However, the record remains in the database and it is still accessible to Site-Level Operators from the other Site(s), as well as to headquarters level operators.

Headquarters level operators (operators with access to "All Sites") are not subject to these restrictions even if their account uses [Site Level Access \[pg:0092\]](#). When a headquarters level operator deletes a record, it is removed from the database regardless of what Site(s) the record is associated with.

### Remove a Deleted Record Before the 5 Day Hold Period Ends

You can permanently remove a volunteer record from the database before the end of the 5 calendar day hold period if needed. Please remember that there will

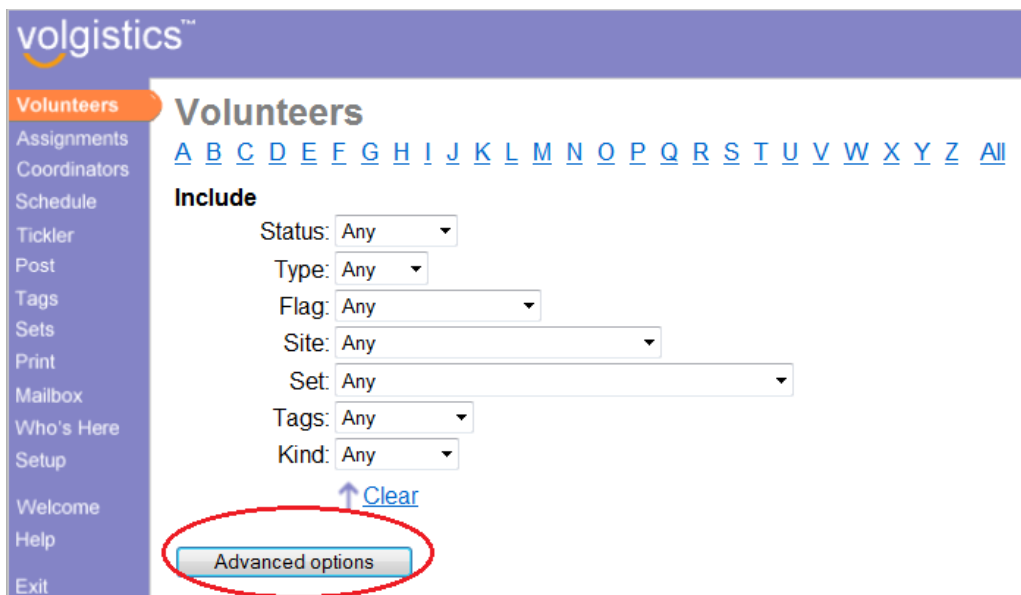
*not*

be a way to recover the record from the system if you do this. All information associated with the record (with the exception of the zip file of downloaded [VicDocs \[pg:1648\]](#) documents) will be removed from the system.

The downloaded zip file of VicDocs will still be available for 5 days from the date the record was deleted even if you permanently delete the record before this time. If you wish to permanently delete the zip file before 5 days, follow the directions in the [Deleting In Box Items \[ \]](#) section of help topic 1110.

To remove a record before the end of the 5 day hold period:

1. Choose Volunteers from the [menu \[pg:0215\]](#). The initial Volunteers screen appears.
2. If the Advanced Include options are not already displayed, click the **Advanced options** button.



3. Click the **Show deleted volunteers** button at the bottom of the page.

- Tagged
- Not tagged

**Kind**

- Any
- Individual
- Group

Archived volunteers



Basic options   Show deleted volunteers

**Find**

Find from within all volunteer records.  
 Valid searches: exact phrase (such as **Volgistics**) or an \* (asterisk) at the beginning, middle, or end: **\*gistics** or **Vo\*stics** or **Volg\***.

Find Name:

4. Click the **Permanently Delete** button beside the record you need to remove now.

Name	Delete Date & Options	Group name	Search S
<input type="text" value="Search Name"/>	<input type="text" value="Search Delete Date &amp; Opt"/>	<input type="text" value="Search Group name"/>	<input type="text" value="Search S"/>
Drury, Judith P	(12-07-2015) <input type="button" value="Restore"/> <input type="button" value="Permanently delete"/>		4565 Cer
Nowicki, Judith W	(12-07-2015) <input type="button" value="Restore"/> <input type="button" value="Permanently delete"/>		956 Shini
Scott, Mary J	(12-07-2015) <input type="button" value="Restore"/> <input type="button" value="Permanently delete"/>		4859 Wa
Thomas, Jill D	(12-07-2015) <input type="button" value="Restore"/> <input type="button" value="Permanently delete"/>		4138 Hill
Volontina, Isabella C	(12-07-2015) <input type="button" value="Restore"/> <input type="button" value="Permanently delete"/>		56 Michi



**Related help**

- [Help Topic 2001 \[pg:1822\]](#) - Delete Archived Volunteer Records
- [Help Topic 2311 \[pg:1888\]](#) - How do I restore a deleted volunteer record?

## Combine Duplicate Volunteer Records

Help topic 2310  
 Added or revised 01-26-2016

While Volgistics has features to help you [avoid the creation of duplicate volunteer records \[pg:1389\]](#), from time to time you may find that two or more separate volunteer records have been created for the same volunteer. If this happens, you can combine the two records into one automatically using the

**Combine**

button. Please note that this will delete the older of the two records and save the combined records to the most recent record. The older record is permanently deleted from the system. *There is not a way to restore this record as you can when records are [deleted \[pg:1880\]](#).* (See the [How the most recent record is determined](#) box below for information on how the system decides which record is the most recent.)

When you combine duplicate volunteer records, the information from both records is merged into a single record. This includes all assignment, schedule, service (including hours), contact, and history records. However, not all information is merged because it could potentially cause conflicting information. For example, the [Status history \[pg:1832\]](#) is only kept for the record that will remain after the merge. Likewise, the [history of messages received \[pg:0370\]](#) is only kept for the record that remains after the two records are combined.

*If the two records happen to include any assignment, schedule, service, contact, or history records that are **exactly** the same, these records will not be duplicated in the combined record.*

If the two records have different information in the same field (for example, if each record has a different email address), the entry from whichever record is more recent will be saved. *You should note that a blank is considered to be an entry because fields can be intentionally left blank.* So, for example, if the most recent record has a blank for the City field, and the older record has "Boston" for the City field, the combined record may have a blank for the City field.

Also, you should note that if *either* of the two volunteer records you combine are [Group \[pg:1802\]](#) volunteer records, the resulting combined record will always be a Group volunteer record (which you can change on the [Core tab \[pg:1868\]](#) in the combined record if you would like to).

## **How the most recent record is determined**

It is important to understand how the system determines the most recent record *before* you combine records. To determine which record is most recent, Volgistics looks for the most recent [Date of last activity \[pg:0076\]](#).

This statistic is taken from the volunteer's last service hours recorded. So even if one volunteer record was created more recently, if that record

*does not*

have any service hours recorded--its information will be replaced by the older record's information as long as the older record

*does*

have service hours recorded.

In this case, if you want the newer record's information to be used, you can enter a token service entry on the record. This will make the record show the most recent Date of last activity. [Help topic 2021 \[pg:1569\]](#) shows how to enter service on a record. This service entry can be deleted after the records are combined if necessary.

## **To combine duplicate volunteer records**

1. Choose Volunteers from the menu.
2. Locate one of the duplicate volunteer records and then open it to the [Core tab \[pg:1868\]](#).

3. Click the **Combine** button near the top of the **Core tab** [pg:1868]. This opens the Combine box. If the **Combine** button does not appear, see the Operator Rights section below.

4. Use the

*Search by*

dropdown list to select how you'd like to search for the record you'd like to combine. You can search records according to Last Name, First Name, or **Group Name** [pg:1802].

5. Start typing the last name, first name or group name of the record you want to combine with the first record into the field to the right of the *Search by* dropdown list. After the second character is entered, the list of records with matching criteria will grow smaller with each additional character entered. You can select the record you need from the list at any point.

## Smith, Kay

**Combine**

Use this page if you want to merge two duplicate volunteer records for Kay Smith into one record.

Choose the volunteer record you want to merge with the volunteer record for Kay Smith, and then click the **Combine** button.

Search by **Last Name** :

[Which record is saved?](#)

- Smit, Jeffrey, A
- Smith, Alicia, S
- Smith, George, William
- Smith, Helen, Lynn
- Smith, Kaylyn, J
- Smithfield, Patricia, Lynn
- Smythe, Madison
- (Louis Brothers Manufacturing)

[Help](#)

6. Click the **Combine** button once you have selected the second record to combine. A confirmation dialog box will pop-up asking if you are sure you want to continue. If you want to combine the two records, click the **OK** button. If you changed your mind and do not want to combine the records, click the **Cancel** button.

7. If the two records being combined will have more than 50 documents on file when they are combined, the records will not be combined yet and a *Combine Documents* page will appear. See the Combine Documents section below for information on how to proceed.

## Operator Rights

If you don't see a **Combine** button on the Core tab, your Volgistics **System Operator rights** [pg:1433] do not include the ability to combine duplicate volunteer records. Your System Operator rights are set by your organization's **Volgistics Administrator** [pg:0052].

## Combine Documents

When the two records being combined will have more than 50 documents, a page appears that allows you to select the documents that should be kept and the documents that should be deleted.

## Combine Documents Combine Cancel

The two volunteers you are merging have a total number of documents that is more than the allowed document maximum (50). You need to select which documents you want to keep and which ones to be deleted.

The documents listed below are color coded for each volunteer as follows: Kay Smith Kaylyn Smith

Drag and drop the documents to the corresponding column.


Keep these documents (34)	Delete these documents
Parental Consent Form	<a href="#">K. Smith Resume</a>
Interest Survey	<a href="#">Interest Survey</a>
Application-Individual Form	<a href="#">Photographic Release</a>

The most recent record's documents will be shown in the *Keep these documents* column on the left. Drag and drop documents from one column to the other until you have the documents you wish to save in the *Keep these documents* column. When you are finished, click the **Combine** button to finish combining the records.

If the number of documents in the *Keep these documents* column is more than 50, the **Combine** button will be disabled until the column's total is 50 or less. You can easily tell when the column's total exceeds the limit because the document count after the column heading will turn red.

Drag and drop the documents to the corresponding column.

Keep these documents (57)	Delete these documents
Parking Permit Form	<a href="#">K. Smith Resume</a>



### Helpful Hints

1. You can often click on a document's name to open it in a new browser tab or window. This will allow you to view the document, which can be helpful when you are deciding which column to place the document in.
2. You can save the documents in the *Delete these documents* column to your local computer before you combine the records. To do this, open the document as described in hint one and then use the save feature of the program used to view the document. Or, you can also right-click on a document's name and select *Save as* or *Save target as* from the menu.



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## How do I restore a deleted volunteer record?

Help topic 2311

Added or revised 12-08-2015

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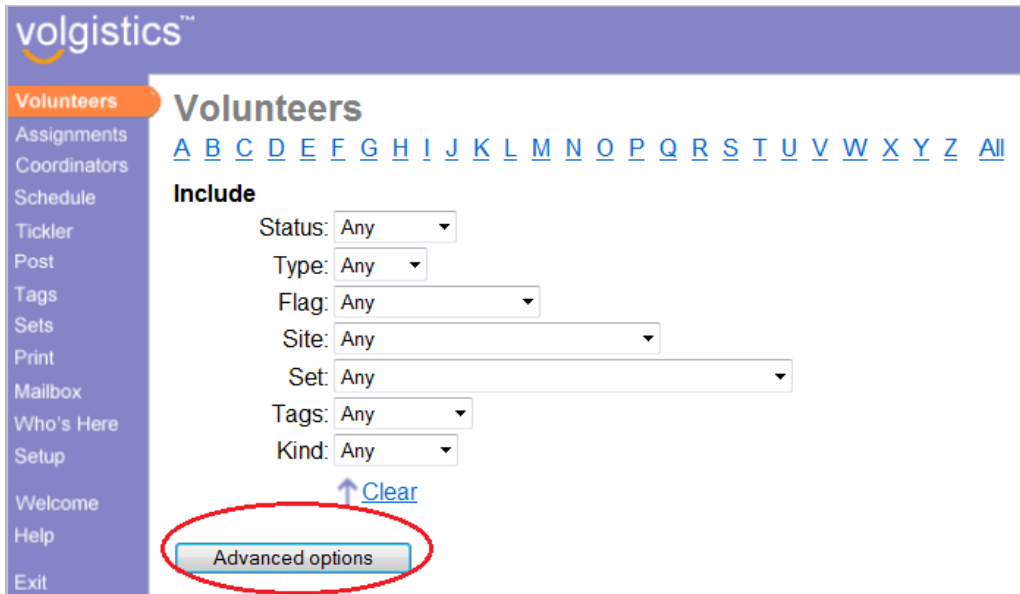
When a volunteer record is deleted, it is held for five (5) calendar days before it is permanently removed from the system. This five day window allows a [System Operator \[pg:0065\]](#) to recover records that were accidentally deleted. **After the five day hold period passes, there is not a way to recover a deleted volunteer record.**

Please note the following regarding restoring deleted records:

- In order to restore deleted records, the System Operator's rights must allow them to delete volunteer records.
- System Operator rights are controlled by the [Administrator\(s\) \[pg:0052\]](#) of the account on the [System Operator Page \[pg:1433\]](#) of the record.
- Only records deleted as shown in help topics [2309 \[pg:1880\]](#) and [2001 \[pg:1822\]](#) can be restored. Records deleted by using the [combine records \[pg:1884\]](#) feature *cannot* be restored.
- Records are restored to their most recent location in your database. For example, records deleted from the non-archived section of your database are returned to the non-archived section. Records deleted from the archived section of your database are returned to the archived section. [Help topic 1999 \[pg:0709\]](#) explains more about each section.
- If [Site Level Access \[pg:0092\]](#) is enabled, records are returned to the Site(s) they were associated with. This is recorded on the Core tab of the record as shown in [help topic 2037 \[pg:0094\]](#). In this case, to see a restored record the System Operator must be assigned to "All Sites" or to one of the Sites recorded on the Core tab of the restored record.
- Deleted records can only be restored if your account is below the capacity set by your [service level \[pg:0719\]](#). For example, if your service level allows for 500 archived records, and you currently have 500 archived records in your database, you will not be able to restore an archived record that was deleted.
- There is not a way to restore the schedule for a volunteer who has been deleted. The volunteer is removed from all schedule entries when the record is marked for deletion.

To restore a volunteer record that was deleted:

1. Select *Volunteers* from the [menu \[pg:0215\]](#).
2. If the Advanced include options are not already displayed, click the **Advanced options** button.



3. Click the **Show deleted volunteers** button. If the record you need to restore was deleted from the archived section of your database, check the *Archived volunteers* box that appears directly above the **Basic options** button before clicking the **Show deleted volunteers** button.

- Tagged
- Not tagged

**Kind**

- Any
- Individual
- Group

Archived volunteers



**Find**

Find from within all volunteer records.  
 Valid searches: exact phrase (such as **Volgistics**) or an \* (asterisk) at the beginning, middle, or end: **\*gistics** or **Vo\*stics** or **Volg\***.  
 Last Name:

4. Click the

**Restore**

button that appears by the record you would like to restore. If this button does not appear, your account's **service level** [pg:0719] is at capacity and there is not room to restore the deleted record, or your System Operator rights do not allow you to restore deleted records. The date the record was deleted from your database appears in parenthesis in the same column as the **Restore** button.

Name	Delete Date & Options	Group name
Search Name	Search Delete Date & Opt	Search Group name
Drury, Judith P	(12-07-2015)	4565 Ce
Nowicki, Judith W	(12-07-2015)	956 Shin
Scott, Mary J	(12-07-2015)	4859 Wa
Thomas, Jill D	(12-07-2015)	4138 Hill
Valentine, Isabella C	(12-07-2015)	56 Michi

## Start and Stop Dates

Help topic 2315

Added or revised 12-12-2006

Volgistics makes it easy to track volunteer 'start' and 'stop' dates.

By default, a volunteer's start date is the date they first become an 'active' volunteer, and their stop date is the date they become an inactive volunteer (you can customize this using the [start and stop date rules \[pg:1017\]](#)). Volgistics records these dates for you automatically each time you mark a volunteer active or inactive: you don't need to enter these dates manually.

To mark a volunteer's status 'active,' open their record, choose 'Active' from the status field on their Core tab, and then click the Save button.

The screenshot shows a portion of the Volgistics interface. At the top, there are three buttons: 'New', 'Previous', and 'Next'. Below these, there is a form with the following fields:

- Number: 15
- Status: Active (dropdown menu)
- Type: Adult (dropdown menu)

A red oval highlights the 'Status' dropdown menu, which is currently set to 'Active'.

To mark a volunteer's status 'inactive,' open their record, choose 'Inactive' from the status field on their Core tab, and then click the Save button.

[New](#)   [Previous](#)   [Next](#)

Number:

Status:

Type:

When you mark a volunteer 'active,' Volgistics automatically records their 'start date' as the date they became active. When you mark a volunteer 'inactive' Volgistics automatically records their 'stop date' as the date they became inactive.

You can see a volunteer's Start and Stop date on their History tab.

Dates		Start date: 02-02-2004	Stop date: 07-23-2005	Date entered: 10-27-2006
	Event	Date	Expires	Notation
Status	Inactive	07-23-2005		<a href="#">Edit</a> <a href="#">Delete</a>
Status	Active	02-02-2004		<a href="#">Edit</a> <a href="#">Delete</a>
Status	Applicant	01-09-2004		<a href="#">Edit</a> <a href="#">Delete</a>

If a volunteer hasn't yet been marked active they will not have a start date, and until they're marked inactive they will not have a stop date. Volunteers who were active at one time, but are now inactive will have both a start date and stop date.

Each time you change a volunteer's status, Volgistics automatically records the date their status changes on their History tab along with their other key dates. These appear just below their start and stop dates, as shown here:

Dates		Start date: 02-02-2004	Stop date: 07-23-2005	Date entered: 10-27-2006
	Event	Date	Expires	Notation
Status	Inactive	07-23-2005		<a href="#">Edit</a> <a href="#">Delete</a>
Status	Active	02-02-2004		<a href="#">Edit</a> <a href="#">Delete</a>
Status	Applicant	01-09-2004		<a href="#">Edit</a> <a href="#">Delete</a>
Checklist	Attends orientation	03-04-2004		See file <a href="#">Edit</a> <a href="#">Delete</a>
Checklist	Initial interview	01-12-2004		Complete <a href="#">Edit</a> <a href="#">Delete</a>
Class	Customer Service Training	08-02-2004		Completed <a href="#">Edit</a> <a href="#">Delete</a>

[Add](#)

In the example shown above, the volunteer's status was initially set to 'Applicant' on January 9, 2004 when they first submitted an application. They were made 'active' on February 2, 2004. February 2, 2004 became their 'start date' automatically. On July 23, 2005 they left, and the volunteer leader changed their status to 'Inactive' which made their 'Stop date' July 23, 2005 automatically.

If you want this volunteer's 'start date' to be a date other than February 2, 2004, change their 'active' status date. For example, suppose this volunteer actually started volunteering years earlier, on December 1, 1995. You can change their 'active' status date to 12-01-1995 by editing their active status date entry:

1. Click the Edit button on the date you want to change.

Status	Inactive	07-23-2005			Edit	Delete
Status	Active	02-02-2004			Edit	Delete
Status	Applicant	01-09-2004			Edit	Delete

2. In the Edit box, enter the new date.

**Edit**

Add a:

Event:

Date:

Notation:

3. Click the Save button.

The volunteer's start date will change automatically to reflect their new 'active' status date.

<b>Dates</b>		Start date: 12-01-1995	Date entered: 10-27-2006			
		Stop date: 07-23-2005				
	Event	Date	Expires	Notation		
Status	Inactive	07-23-2005			Edit	Delete

Sometimes volunteers become inactive, but then return later. When this happens, you'll see each of their status change dates on the History tab.

Dates		Start date: 02-02-2004	Date entered: 10-27-2006			
		Stop date:				
	Event	Date	Expires	Notation		
Status	Active	03-09-2007			Edit	Delete
Status	Inactive	07-23-2005			Edit	Delete
Status	Active	02-02-2004			Edit	Delete
Status	Applicant	01-09-2004			Edit	Delete
Checklist	Attends orientation	03-04-2004		See file	Edit	Delete
Checklist	Initial interview	01-12-2004		Complete	Edit	Delete
Class	Customer Service Training	08-02-2004		Completed	Edit	Delete

[Add](#)

In the example shown above, the volunteer's status was initially set to 'Applicant' on January 9, 2004. They first became 'active' on February 2, 2004. On July 23, 2005 they became inactive, and on March 9, 2007 they became active again. The volunteer's start date is still February 2, 2004 since that was the date they *first* became active, and they do not have a stop date because they are currently active.

#### Related help

[Help Topic 2022 \[pg:1839\]](#) - How do I change a volunteer's Start Date?

[Help Topic 2314 \[pg:1017\]](#) - Start and stop date rules

[Help Topic 2048 \[pg:0841\]](#) - Find the volunteers who became active in a certain year

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## How to Handle Volunteer Records for Deceased Volunteers

Help topic 2330

Added or revised 06-10-2014

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The best practice for handling volunteer records for deceased volunteers is this:

- If you don't already have one, create a *Deceased Flag* [\[pg:0212\]](#) and Flag the volunteer as *Deceased*. You can also note the date the volunteer passed on the Notes tab of their record.
- If the volunteer was previously *Active* change their *Status* [\[pg:1832\]](#) to *Inactive*.

[Archive](#) [\[pg:1819\]](#) the volunteer's record.

Changing a decedent's status to *Inactive* will remove them from any schedules they may have been on (unless you've changed this default setting in your account).

If the deceased volunteer performed any volunteer service during the current year, and your organization tracks volunteer hours, archiving the record for the deceased volunteer instead of deleting it ensures that their hours will still be included on any year-end service reports you run. Archiving the record rather than deleting it also gives you a way to restore or examine the record in the future if there are any questions about the volunteer's participation with your organization.

Moving the deceased volunteer's record to the archive prevents you from inadvertently sending any email, text message or postal mail to the decedent through Volgistics.

If you track and report volunteer service, keep the deceased volunteer's record in your archive at least until you've completed any year-end service reports you choose to run. You may [delete \[pg:1822\]](#) the deceased volunteer's record from the archive any time you deem appropriate after that.

## Additional Help Documents

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### System Operator Page

Help topic 1011

Added or revised 03-31-2017

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In Volgistics, System Operators are the users who login to the system with the Login link located at [www.volgistics.com](http://www.volgistics.com). The System Operator page is used to add a new System Operator, change the settings for an existing System Operator, or delete a System Operator.

If you're not already on the System Operator page, you can get there by choosing Setup from the menu, selecting *System Operators* and then clicking the *Create a new operator* link or the link to an existing System Operator.

This help topic gives details on each field on the page. You can navigate directly to a specific item in the help topic by clicking the link in the Contents box.

#### Contents

Basic Operator Information

Last Name

First Name

Email address

Phone number

Password & Confirm password

Operator must change their password when they login next

Time zone

Date of Last Activity

Rights

Block this operator's access to the system

Site

User level

Computers

This operator may have access to

This operator is allowed to

Email

Reply-to address

Email signature block

Basic Operator Information

Last name

Enter this operator's last name

First name

Enter this operator's first name



### Email address

Enter this operator's email address. This is the email address this System Operator will enter when they login to Volgistics.

### Phone number

Optionally enter a telephone number for this System Operator.

### Password & Confirm password

Enter the password this operator will use when they login to Volgistics. Passwords are case sensitive, can be up to 30 characters long, contain lower and upper case letters, numbers, and special characters such as \$ & or ?.

For security purposes, you do not see the password as you enter it. To be sure you've entered the password correctly, enter the same password in the *Password* and the *Confirm password* fields. Volgistics will check to be sure you entered it the same way in both of these fields.

If the *Caps Lock* key on your keyboard is on, you will receive a warning message like the one below when you start to type in the password. In this case, press the *Caps Lock* key on your keyboard to turn this off before continuing.



The screenshot shows a form titled "New System Operator" with the following fields and elements:

- Last name: Lawson
- First name: Brenda
- Email address: b.lawson@volunteers.org
- Phone number: (555) 123-4567
- Password: [Redacted]
- Confirm password: [Redacted]
- Operator must change their password when they login next:
- Time zone: (GMT-05:00) Eastern Time (US & Canada)

A warning message is displayed on the right side of the form: "Caps Lock is on" with a yellow exclamation mark icon.

If you enter a password that does not meet the password strength rules setup on the System Operator Ground Rules page, you will see a message like the one below when you attempt to save the record. The message lists the password strength rules currently in place. You will need to re-enter a password that meets each rule in order to be able to save it.



## Password does not meet the password strength rules for your account.

The password you entered does not meet one of the following password rules. Passwords must:

- Be between 8 and 30 characters long.
- Include both letter and number characters.
- Include some upper and some lower case letters.
- Include some characters that are not letters or numbers, such as !#\$% or ?.
- Must not contain any space characters.
- Be different from the current password.

Enter a new password that conforms to these rules, and then click the Save button again.

### Operator must change their password when they login next

Check this box if you want to require this System Operator to choose a new Volgistics password the next time they login. Checking this box when you create a new System Operator, or update the password strength rules, forces the System Operator to select a password other than the password assigned to them when they login the next time.

### Time zone

Select the time zone for the location where this System Operator is based. In many organizations, everyone who uses Volgistics works from the same time zone. However, in some national and international organizations, some operators may be located in distant locations and time zones. This setting allows Volgistics to localize date and time values for individual System Operators.

If your organization uses the VicTouch module, this setting also controls the times that will appear when the operator views the Who's Here page.

### Date of Last Activity

This field tracks when the operator logged into the account last. It can be useful to note this to see if the operator's record is necessary in your account. If the operator is not logging in regularly, you can delete the System Operator and then reduce your account's service level. Or, you can delete the record and then create a new record for someone who will use it.

### Rights

#### Block this operator's access to the system

Check this checkbox to temporarily prevent this System Operator from being able to login to Volgistics. As long as this checkbox is checked, no one can access Volgistics using this operator's credentials. Once this checkbox is un-checked, this System Operator can access the system with the Rights you select for them.

### **More Help**

This help topic explains how to setup or change an operator's record to limit access to the system or the actions

the operator can perform. You may also find help topic 2028 useful because it gives examples of how the changes will appear for the operator, as well as more information on how to configure your account to limit operator access.

### Site

If your organization has volunteer offices at multiple Sites, and you want to limit this operator's access to just the volunteers assigned to one individual Site, select that Site here. Otherwise, select *All sites* here. Volgistics refers to an operator with access to just one Site as a Site-Level Operator.

See Site Level Access for more information about this Volgistics feature.

### User level

User levels determine the degree of access a System Operator has in the Volgistics system. Every System Operator has one of the three following *user levels* in Volgistics:

- Basic User
- Power User
- Volgistics Administrator

By default, *Basic users* and *Power users* have the same level of access to the system; however, you can tailor what *Power users* and *Basic users* are allowed to do in Volgistics by granting or restricting specific tab rights and/or field rights to these user levels.

*Basic User.* Choose *Basic User* for operators who will have basic access to Volgistics. These are typically people who assist with data entry, but who do not perform many reporting or management functions. You can customize which tabs *Basic Users* can see on the Tab Rights page and which fields they can see or change in the Field Properties window. Please note that only *Volgistics Administrators* have access to the Volgistics Store with their login credentials. However, you can give a *Basic User* access by giving them the accounting access code for your account.

*Power User.* Choose *Power User* for operators who will be extensive users of the Volgistics system. These are typically people who not only assist with data entry, but who also perform reporting or management functions. You can customize which tabs *Power Users* can see on the Tab Rights page and which fields they can see or change in the Field Properties window. Please note that only *Volgistics Administrators* have access to the Volgistics Store with their login credentials. However, you can give a *Power User* access by giving them the accounting access code for your account.

*Volgistics Administrator.* *Volgistics Administrators* have access to all of your account's administrative controls so this user level should only be selected for the operator (or operators) your organization has designated as the *Volgistics Administrator*. If you do not want to give an individual complete access to your database, you should make them a *Power user* or *Basic user*. You can customize which tabs *Volgistics Administrators* can see on the Tab Rights page and which fields they can see or change in the Field Properties window.

### Computers

If your organization's internal network has a shared Internet connection that uses a fixed IP address (so all of the computers on the internal network use the same public IP address on the Internet) you can create a System Operator who is permitted to access Volgistics only when they use a computer on your internal network. These operators would not be able to access the system from any computers outside of your internal network.

*Login allowed from any computer on the Internet.* Choose this option if this System Operator is allowed to access Volgistics from any computer on the Internet or if there is not a fixed IP address to which this operator's access can be restricted.

When this option is selected this System Operator may access Volgistics from any computer on the Internet. This is the default setting.

*Login allowed only from computers that use one of these Internet addresses.* Choose this option if your organization has Internet access through a shared network or broadband connection that has a static (or fixed) public IP address, and you want this System Operator to use Volgistics only from computers on your internal network. An example of when this might be used is if you have a System Operator who only enters data while they are in your office--and you do not want them to be able to login to the system from a computer at their home or other site.

If you are not sure if your organization has Internet access that uses a fixed IP address, contact your organization's computer support department or ISP. If your organization does have a fixed public IP address for Internet access, your computer support department or ISP can tell you what that IP address is.

*Permitted IP address.* Enter up to two public IP addresses here. This System Operator will be permitted to login only when they access the system from a computer using either of these two addresses. If you have just one fixed IP address enter zeros for the second permitted IP address.

You can permit access from an entire Class A, B, or C network by entering a zero for the appropriate IP address octets. For example, to permit access from any IP address in the range 192.168.1.1 to 192.168.1.255 you would enter "192.168.1.0."

### **Caution**

For security purposes, the Volgistics Team cannot remove this restriction from a System Operator under any conditions. If you choose to impose this restriction on a System Operator, only a *Volgistics Administrator* from your organization can remove this restriction or change the permitted IP addresses.

To prevent potential *lock-out* conditions, this restriction cannot be placed on System Operators who are Volgistics Administrators. Volgistics Administrators can always login to the system from any Internet connected computer.

### This operator may have access to...

Each of these checkboxes corresponds to a Volgistics menu item, and they allow you to control which menu options *this* System Operator can see and use. Check the menu items you want this operator to be able to use, and un-check any you do not want this operator to be able to use. For example, if this System Operator is someone who would not normally use the Tickler menu option, you can remove the check from the Tickler menu item.

In most cases, it's best to check the Setup menu option only for operators whose access level you've set to *Volgistics Administrators*. However, this is not required so if you may check this option for *Power Users* and *Basic Users* if it fits your needs.

### This operator is allowed to...

Choose the privileges appropriate for this operator by placing a check mark next to the privileges you want this operator to have, and removing the checkmark from any you do not want this operator to have.

*Change their password (if it has not expired).* You should normally give all operators this right, since allowing operators to change their passwords on a regular basis can improve security. If you do not want this operator to be able to change their password for any reason, un-check this item.

*Add new volunteer records.* When checked, this operator is allowed to create new volunteer records. If you do not want this operator to be able to do this, un-check this item.

*Delete and restore volunteer records.* When checked, this operator is allowed to delete complete volunteer records, combine volunteer records, and restore deleted records. If you do not want this operator to be able to do these things, un-check this item.

*Archive and restore volunteer records.* When checked, this operator is allowed to archive volunteer records as well as restore archived records. If you do not want this operator to be able to do this, un-check this item.

*Change or delete existing service records.* If checked, this operator can modify or delete service records (hour entries) that were entered previously. If not checked, this operator cannot make changes to, or delete, service (hour) records entered previously. However, they can still make new service entries.

*Add new assignments.* If checked, this operator can create new Assignments on the Assignments page. If this box is not checked, this operator cannot add a new Assignment to the system.

*Combine, move or delete assignments.* When checked, this operator is able to combine, move, and delete assignment records. If this operator should not be permitted to do any of these things, un-check this box.

*Add or change schedule openings and schedule setup.* When checked, this operator can add or change schedule openings on your volunteer schedules, as well as add or change volunteer entries on schedules.

When un-checked, this operator can still add or change volunteer entries on schedules, but they cannot add new schedule openings or make changes to existing schedule openings. It's a good idea to un-check this option for people who will help manage volunteer schedules, but who are not responsible for initially establishing the schedules.

*Send email and text messages.* Un-check this option if you do not want this operator to be able to use Volgistics to send email and text messages to volunteers or Coordinators. When checked, this operator can send email and text messages to volunteers and Coordinators.

*Create or modify reports.* When checked, this operator can create new Volgistics reports and modify existing reports. When this privilege is not checked, this operator can still print existing reports, but they cannot create new reports or change existing reports.

*See Account Statistics on Welcome page.* When checked, this operator will see the Account Statistics box on the Welcome page. The Account Statistics box displays summary information such as the number of volunteers and amount of service performed overall in your organization. The Welcome page is what first appears when you login to Volgistics and when you choose *Welcome* from the menu.

*See Birthday Lists on the Welcome page.* If you use the birthday list feature, checking this box causes this System Operator to see the current birthday list on the Welcome page. If this box is not selected, or you do not use the birthday list feature, this System Operator will not see the birthday list on the Welcome page. The Welcome page is what first appears when you login to Volgistics and when you choose 'Welcome' from the menu

*See information popup icons (blue circles with 'i' inside).* When this box is checked, this operator will see the information icons that appear throughout the Volgistics account. An example of what the operator would see if they place their cursor over the information icon by the Status field on the Core tab of the volunteer's record appears below:



The information icons are useful to new operators because they give information on how the fields and features are used, and often have links to help topics about the item. If the operator is familiar with the system and does not want to see the information icons, un-check this box.

See *session expiration warnings*. Volgistics includes a security feature that closes sessions automatically when approximately 60 minutes of inactivity occur. You can optionally disable the alert messages warning that the session will be expiring soon. *This will not prevent the session from expiring. It will only prevent the alert messages from appearing for the operator.* You can learn more about the feature that closes inactive sessions [here](#).

## Email

### Reply-to address

Use this optional text field if email messages sent by this System Operator should contain a reply-to address other than their login name email address (provided in the *Email address* field above). When this System Operator sends email, the address entered here will be used as the reply-to address. If this field is left blank the reply-to address will be the System Operator's email address.

### Email signature block

Each System Operator can customize his or her own email signature block, which automatically appears at the bottom of all email messages he or she sends through Volgistics. The text entered here will be used as this user's default email signature block. When this System Operator composes a new email message in Volgistics, this default signature will appear, but there will be an option to edit the signature for that specific message.

Click **Save** to save changes you've made to a System Operator record, **Cancel** to exit without saving your changes, or **Delete this operator** to delete the selected System Operator record.

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## Sending and Receiving Help Inquiries

Help topic 1027

Added or revised 06-10-2016

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If you have a trial or a paid Volgistics account, we recommend that all help inquiries be sent from the *Help E-mail* tab of your Volgistics Mailbox instead of by selecting Support from the menu at the top of the page at [www.volgistics.com](http://www.volgistics.com).

There are four reasons we recommend this.

- The questions and responses will all be stored in one place so you have a quick, handy reference if you have the same question again or you are training a new System Operator.
- The Volgistics Support Team can respond to your inquiries quicker and more accurately because the inquiries you submit will be linked to your Volgistics account.
- You can include additional resources such as a report you have a question about or a screenshot of what you are seeing.
- You can create follow-ups so that all the inquiries in a chain are connected. This can be helpful to the Support Team because we will be able to see the previous inquiry so information will not need to be repeated.

Other people from your organization who have access to your Volgistics account can see your inquiries and the responses to them in case they have a similar question. However, no one from outside of your organization, such as volunteers and people in other organizations, can see them.

The Volgistics Support Team is available to answer your questions weekdays from 8 am to 9 pm Eastern. On Saturday, we are available from 11 am to 4 pm. Additionally, a support team member will log in at least once Saturday evening and three times throughout the day on Sunday. The typical response time during support hours is between 10 and 15 minutes. When you submit your question after support hours, the team will answer it the next time support resumes.

You can go directly to a section of this help topic by clicking a link in the *Contents* box below.

### Contents

[Send a New Help Inquiry](#)

[Send a New Help Inquiry with a Report Attached](#)

[Send a New Help Inquiry with a Screenshot or Other File Attached](#)

[Send a Follow-up Help Inquiry](#)

[Receive Responses to Help Inquiries](#)

[How to Make a Screenshot](#)

**[Send a New Help Inquiry](#)**

Take the following steps to get to the New Help Inquiry window:

1. Choose Mailbox from the menu.
2. Click on the *Help E-mail* tab.

3. Click the **Send an inquiry** button.

Use the New Help Inquiry window fields to prepare your help inquiry.

Posted By

The name associated with the login name you used to access the Volgistics system appears here.

This is about

Choose the entry that best describes the kind of inquiry you are making.

Subject

Enter a few words to summarize your inquiry (for example "Printing mailing labels," or "Renewing my account"). Please note that this field is limited to 40 characters so any information beyond this limit will not appear on your inquiry.

Message

Enter your question(s) here.

If you are writing about an error message you received, be sure to include the exact wording of the message and the error number (if one was provided).

Send or Cancel

Click **Send** to send your inquiry, or **Cancel** to continue without saving or posting an inquiry.

**Send a New Help Inquiry with a Report Attached**

If your inquiry is about a stock or custom report you have created, it is often useful to send a copy of the report to the team so they can refer to it when answering your question. *In order for us to see the report you must keep it on the In Box* of your Volgistics mailbox. If you delete the report, we will not be able to see it.

Here are the steps to send a report along with your help inquiry:

1. Choose Mailbox from the menu.
2. Click on the *Help E-mail* tab.
3. Click the **Send a report inquiry** button at the bottom of the page.



**Mailbox**

[In Box](#) [Out Box](#) [Applications](#) [Service](#) [Help E-mail](#) [Documents](#)

[Refresh](#) [Send an inquiry](#)

**Help email**  Include archived inquiries

<a href="#">Reply</a>	<a href="#">Posted by</a>	<a href="#">Subject</a>	<a href="#">Posted</a>	<a href="#">Answered</a>
	Brenda Samuelson	<a href="#">Help Inquiry Responses</a>	10-19-2011	10-19-2011
	Annie Smith	<a href="#">Cloning</a>	04-22-2010	04-22-2010

**Have a question about a report?**

If you have a question about a report you printed in Volgistics you can show the report to the volunteer information specialists at Volgistics using the **Send a report inquiry** button here:

[Send a report inquiry](#)

4. Select the report your question is about from the list. If the report does not appear on the list, click the link behind "If your inquiry is not about a specific report."

Use the window fields to prepare your help inquiry. If you need assistance for what a field is used for, you can find details in the Send a New Help Inquiry section above.

### Send a New Help Inquiry with a Screenshot or Other File Attached

If your inquiry is about a problem you're seeing, and you feel it will be helpful for us to see your screen, you can send a screenshot showing what you see. If you need help making a screenshot, see the How to Make a Screenshot section below.

You are not limited to just sending screenshots, any file you feel will be helpful for us to see can be included as long as it is in one of the accepted formats: .doc, .docx, .gif, .jpg, .pdf, .png, .xls, or .xlsx. The file that you send needs to be stored locally on your computer or network, or on a storage device such as a flash drive.

To send us a file to view, follow the steps in the Send a New Help Inquiry section above. Before you click the **Send** button, click the **Choose file** or **Browse** button at the bottom:

Posted by: Alexandra Call

This is about:

Subject:

Message:

Upload optional attachment:  No file chosen  
Acceptable file types: XLS, XLSX, DOC, DOCX, PDF, PNG, GIF, JPG

[Help](#)

Locate the file you'd like to send, click on it, and then click the **Open** button.

Click the **Send** button to finish sending us the inquiry.

### Send a Follow-up Help Inquiry

When you have an additional question, or more information, about a help inquiry that was sent previously you should link the inquiries together. This will help the Volgistics Support Team know your inquiry is related to a previous question and save you from needing to re-enter information. You can find more information on viewing responses to your inquiries in the Receive Responses to Help Inquires section below.

Take the following steps to link a follow-up inquiry to a previous inquiry:

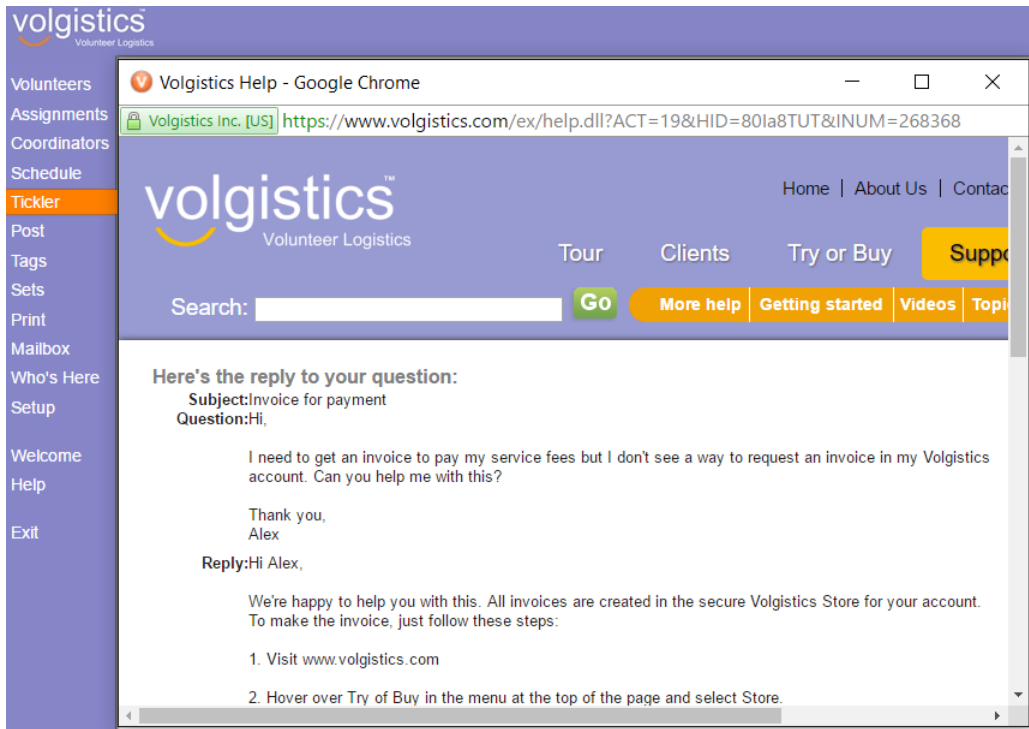
1. Choose Mailbox from the menu.
2. Click on the *Help E-mail* tab.
3. Click the link to the help inquiry in the Subject column.
4. Click the **Post a follow-up** button.

The screenshot shows the Volgistics Mailbox interface. On the left is a vertical navigation menu with items: Volunteers, Assignments, Coordinators, Schedule, Tickler, Post, Tags, Sets, Print, Mailbox (highlighted in orange), Who's Here, Setup, Welcome, Help, and Exit. The main content area is titled "Mailbox" and has tabs for "In Box", "Out Box", "Applications", "Service", "Help E-mail", and "Documents". The "Help E-mail" tab is selected. Below the tabs is a "Close" button. The main content displays a "Help Inquiry" message. The message text is: "Posted by: Brenda Samuelson, 10-19-2011 at 2:04 pm. Subject: Help Inquiry Responses. Message: Where will answered help responses appear? Will I get a message on my Welcome page? Reply: Hi Brenda, Our responses to your help inquiries should appear on the Help E-mail tab of your Mailbox. We can also send a copy of the message to the email address you use to access Volgistics, as we did with this one. Please let us know if you have any other questions. Thank you, The Volgistics Team. 10-19-2011 at 2:06 pm". At the bottom left of the message content is a "Printable View" link. At the bottom right are two buttons: "Post a follow-up" (highlighted with a red box) and "Archive". A "Close" button is also present at the bottom left of the main content area.

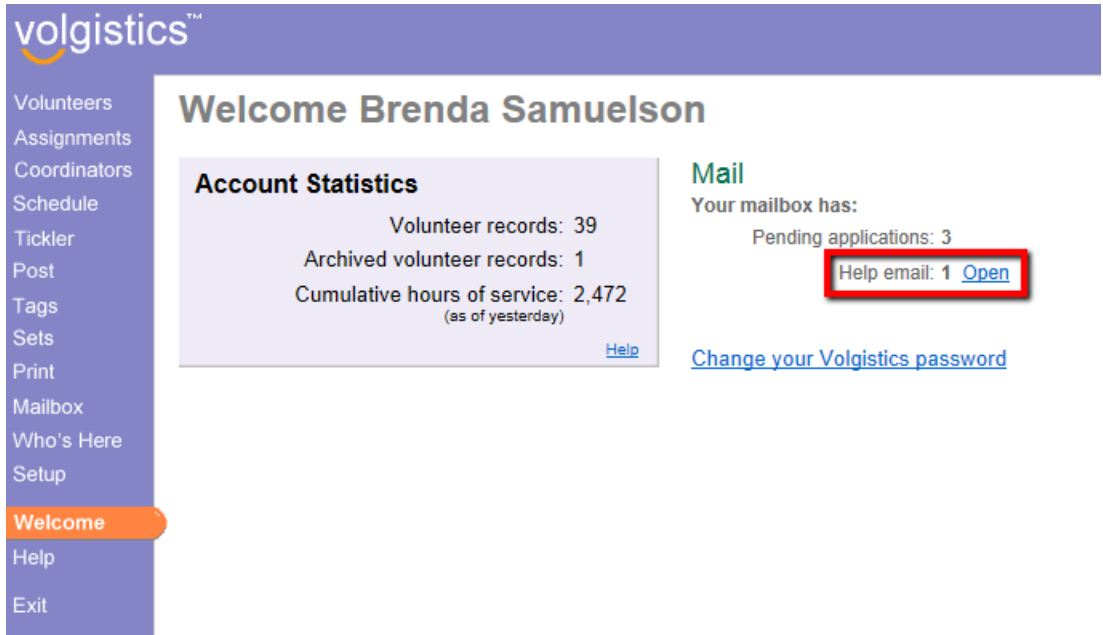
Use the window fields to prepare your help inquiry. If you need assistance for what a field is used for, you can find details in the Send a New Help Inquiry section above.

### Receive Responses to Help Inquiries

If you are working in your Volgistics account when a response is sent, and you are the operator who sent the inquiry, the answer will appear in a separate browser window when you select a new item from the menu.



If you are not working in your Volgistics account when a response is sent, we post a notice and link on your Volgistics Welcome page to let you know. Click the Open link to be taken to the *Help E-mail* tab of your Volgistics Mailbox.



All help responses are collected on the *Help E-mail* of your Volgistics mailbox also. You can go there to read new responses, or review old responses. To do this:

1. Choose Mailbox from the menu.

2. Click on the *Help E-mail* tab.

3. Click the link to the help inquiry in the Subject column.

Unread help responses will appear in bold print and show as **New** in the Reply column.

The screenshot shows the Volgistics Mailbox interface. The top navigation bar includes tabs for In Box, Out Box, Applications, Service, Help E-mail, and Documents. The Help E-mail tab is selected. Below the tabs are buttons for Refresh and Send an inquiry. The main content area is titled 'Help email' and includes a checkbox for 'Include archived inquiries'. A table lists help emails with columns for Reply, Posted by, Subject, Posted, and Answered. The first row is highlighted with a red box, showing a 'New' status, 'Brenda Samuelson' as the sender, 'Inactive Volunteers' as the subject, and '10-21-2011' for both posted and answered dates. Below the table is a section titled 'Have a question about a report?' with a 'Send a report inquiry' button.

Reply	Posted by	Subject	Posted	Answered
<b>New</b>	Brenda Samuelson	<a href="#">Inactive Volunteers</a>	10-21-2011	10-21-2011
	Brenda Samuelson	<a href="#">Assignments</a>	10-21-2011	10-21-2011
	Brenda Samuelson	<a href="#">Help Inquiry Responses</a>	10-21-2011	10-21-2011
	Brenda Samuelson	<a href="#">Help Inquiry Responses</a>	10-19-2011	10-19-2011
	Annie Smith	<a href="#">Cloning</a>	04-22-2010	04-22-2010

If you need to clean-up the list of inquiries and responses, you can archive items that are no longer needed. Help topic 2231 explains how to do this.

### How to Make a Screenshot

Taking a screenshot is something that is done outside of the Volgistics system so how to do it will vary depending on what resources you have available. Below are some outside resources that may help you, but if you need additional assistance you will need to find this on your own. For instance, by doing an Internet search or asking a colleague.

If you have Microsoft Windows, the fastest way to capture a screenshot is with the Snipping Tool. You can find information on this feature on Microsoft's website here.

If you do not have Windows, or cannot use the Snipping Tool, there is an additional resource here. Just click on the tab at the top to go to the instructions for your operating system.

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# Tracking Groups

Help topic 1045

Added or revised 04-28-2014

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Click on a link in the Content window below to be taken directly to that section of the Help topic.

## Content

[Introduction to Group Records](#)

[Adding Group Records](#)

[Finding Group Records](#)

[Scheduling Groups](#)

[VicNet for Groups](#)

[Posting Service for Groups](#)

[Including or Excluding Group Records on Reports](#)

[Using Group Records with Checklist Items](#)

[Using Group Records with Awards](#)

### Introduction to Group Records

Many volunteer programs include both individual volunteers, as well as groups such as businesses; service clubs; and fraternal organizations that provide volunteer service. Volgistics gives you tools for tracking both kinds of volunteers: individuals and groups. This help topic explains the difference between Individual and Group records in Volgistics, and the features that are unique to Group records.

Each time you add a new volunteer record to Volgistics you can mark which kind of record it is: an Individual record or a Group record. You do this using the Kind field which appears in the Name box on the Core tab in each volunteer record.

The screenshot shows a form titled "Name" with several input fields. On the left side, there are fields for "Last name:", "First name:", "Middle name:", and "Nickname:". The "Middle name:" field is followed by a "Title:" dropdown menu. On the right side, there are fields for "Number:" (with the value 0), "Status:" (with a dropdown menu set to "Active"), and "Type:" (with a dropdown menu). Below these is the "Kind:" field, which contains two radio buttons: "Individual" (which is selected) and "Group". This "Kind:" field is circled in red.

Use Individual volunteer records when you want to track personal information (like name and address); volunteer service; Checklist items; or Awards for a person individually, or if you would like to include the individual in Volgistics emails and text messages.

Use Group volunteer records to track groups of people who serve collectively as part of a business; service or social club; fraternal organization; or similar group when you cannot or do not want to track the group's members individually. When you create a Group record, that single Group record will represent all of the members of that particular group. You can record the name and contact information for a group contact on each Group record; however you do not record the names of the individual members of the group in a Group record.

When entering service for a person who is a member of a Group, you will need to decide if the service applies to the Individual or the Group. To avoid double posting the service, be careful to exclude the person from the Group count and Group hours served if you decide to track the individual's service separately. If the service credit should be applied to the Group, do not also post the service to the Individual record.

Here are examples of when to track volunteers using Individual volunteer records and when to track volunteers using a Group record instead.

Nancy Wilson visits your organization one day to express her interest in becoming a volunteer. Nancy's neighbor is a volunteer, and what she's heard about your organization interests her. She's available to serve one day week. Nancy is clearly an individual volunteer and you would track her information in Volgistics using an Individual record.

Once a year your organization conducts a food drive for which hundreds of volunteers are needed to collect food items from homes in various neighborhoods throughout your community. No special volunteer screening is required, and a brief volunteer orientation is given to all volunteers who can help on the morning of the event. Peter Evans, President of the local Rotary Club contacts you and offers to participate. He tells you that his club will send twenty members on the day of the event. In this example it's not necessary for you to track these 20 volunteers individually. Instead, you create a single Group record for the Rotary Club in Volgistics, entering Peter Evans as the contact person for the group.

If you want to track the members of a group individually you can, however you should not create Group records for each group member you want to track individually. Use Individual volunteer records instead.

If you want to track the names – or any specific information such as service, Checklist items, or Awards – for each member of a group, you should track those volunteers using an Individual volunteer record for each person instead of creating a Group record for their group or a separate Group record for each group member. You can still link all of their records together using a Flag if you want to be able to produce reports just for the volunteers who have a specific group association.

For example, an organization has 12 people who volunteer as part of their community's Retired Senior Volunteer Program (RSVP). Even though these volunteers are part of a group, the volunteer leader wants to be able to track the volunteer service for these people individually and give them awards individually. In this case the volunteer leader would track each of these RSVP members using an Individual volunteer record for each person instead of creating a Group record for "RSVP." The volunteer leader can then record volunteer service for these 12 volunteers just like they do for all other individual volunteers (manually, or through VicTouch or VicNet).

Once a month, the volunteer leader must send the RSVP office a report that shows the number of volunteer hours served by these 12 RSVP volunteers. The volunteer leader can accomplish this simply by adding an "RSVP" flag to the Flag field in each of these 12 Individual volunteer records. Then at the end of each month they run a Service Details report that includes only the volunteers who have the "RSVP" flag (they can even setup this report so it runs automatically at the end of each month!).

Group volunteer records differ from Individual volunteer records several ways. The differences between Group and Individual records are explained next.

### **Adding Group Records**

To add a new Group record manually:

1. Choose Volunteers from the menu.
2. Click the **New volunteer** button.
3. Enter the name of the group's contact person in the Name box.

4. Check "Group" in the Kind field.



**Contact Name**

Last name:  Number:

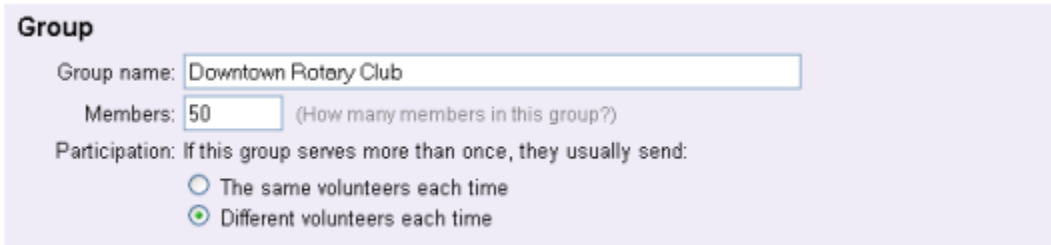
First name:  Status:

Middle name:  Title:

Nickname:  Type:

Kind:  Individual  Group

Once you select Group in the Kind field, a new box appears for entering the group's information.



**Group**

Group name:

Members:  (How many members in this group?)

Participation: If this group serves more than once, they usually send:

The same volunteers each time

Different volunteers each time

Enter the following information about the group.

#### Group name

Enter the group name.

#### Members

If you know how many members this group has, enter the number of people who belong to this group in the Members field. For example, if the Downtown Rotary Club has 50 members, enter 50 here (even if not all 50 members will volunteer). You can leave this field zero if you're not sure how many members the group has.

#### Participation

Choose the option that you think best describes how this group will participate if they will volunteer more than once for your organization. Volgistics uses this information when it calculates unduplicated volunteer counts on service reports.

Choose **The same volunteers each time** if the group will typically send the same people each time the group volunteers. For example, if ten students from a college sorority serve once a month, and it tends to be same ten students each time, choose "The same volunteers each time. "

Choose **Different volunteers each time** if the group will typically send different people each time the group volunteers. For example, if ten employees from a large corporation located in your community serve once a month, and it tends to always be a different 10 people each time, choose "Different volunteers each time."

#### Address

Enter the address and contact information for the group contact person in the Address box.



5. Click the **Save** button save the new group record.

## Icons

Groups and Individuals appear with different icons to help you distinguish Group records from Individual records.

 - Individual

 - Group

## Finding Group Records

Once you've added Group records to your database, you can later find and retrieve these records by the group contact's name or by the group name.

To find by the group contact's name:

1. Choose Volunteers from the menu.
2. Enter the contact person's last name in the Last Name field.
3. Click the Go button to see the volunteers with that last name.
4. Click the contact person's name.

To find by the group name:

1. Choose Volunteers from the menu.
2. Enter the group name in the Group Name field (or you can just enter the first few letters of the group name here).
3. Click the Go button to see the Group volunteers that match your entry.
4. Click on the appropriate group record.

## Scheduling Groups

You can schedule group volunteers along with individual volunteers in Volgistics.

When you add a group to a schedule from the Schedule tab of the Group's record, you'll see an additional Volunteers field you can use to record the number of group members who are to be scheduled. This makes it possible for you to schedule multiple group members in a single step.

Help topic 1197 - Scheduling groups explains more about group scheduling.

## VicNet for Groups

If you use VicNet, group contacts can use VicNet to self-schedule their group members, as well as to post volunteer hours for their group online.

Since you do not track the individual group members when you use Group records, Volgistics does not provide a way for each separate member of group to access their group's records through VicNet.

There are not currently any VicTouch features designed specifically for group contacts or group members.

Help topic 1198 - Using VicNet for groups explains more about the unique features of VicNet for Group records.

### Posting Service for Groups

You can post hours and other service for groups manually from individual group records, from the Post page for multiple records, or the group contact can post hours for their group online using the VicNet option.

When you or the group contact post hours for a group, a *Volunteers* field appears on the service record. Use the Volunteers field to enter the number of group members who participated in the volunteer service you're posting. Volgistics uses this group volunteer count when it calculates unduplicated volunteer counts in reports.

If you choose to post the starting and ending times that volunteers serve when you post volunteer hours, Volgistics will calculate the total hours served by the group automatically based on what you enter in the Volunteers field. For example, if 10 members of a group all worked from 9:00 am to 11:00 am, your service entry would look like this:

The screenshot shows a web form titled "Service" with an "Add" button. The form includes the following fields and values:

- Assignment: Phone Bank (dropdown menu)
- From date: 02-20-2011
- To date: 02-20-2011
- From time: 9:00 am
- To time: 11:00 am
- Hours: 20:00
- Volunteers: 10 (circled in red)

Below the "Volunteers" field is the text "(Number of group members who served these times)". At the bottom right of the form are "Save" and "Cancel" buttons.

The Hours field will automatically show 20:00 hours served (2 hours each for 10 volunteers).

If you do not post the starting and ending times when you post volunteer hours, you will need to enter the total number of hours served collectively by the group, and then enter the number of group members who participated in that service in the Volunteers field. For example, if a group served 50 hours altogether, and there were 16 group members who each served a portion of those hours, your service entry would look like this:

**Service**

**Add**

Assignment: Phone Bank

Date: 02-21-2011

Hours: 50:00

Volunteers: 16 (Number of group members who participated in this service)

Save Cancel

You control if starting and ending times are available for posting service with your account's settings for service tracking.

If your organization uses the VicTouch module, the group's leader can also sign-in and out when they arrive and depart from your facility. With this option, the total for the group's service will be calculated automatically. Help topic 1212 explains more about this option.

### Including or Excluding Group Records on Reports

When you print stock or custom reports in Volgistics there may be times when you want a particular report to exclude Group records, include only Group records, or include both individual and Group records. You can do this by checking the appropriate option on the Include tab for the report.

For example, if you wanted to modify a custom Volunteer List report so it includes both individual and Group records, you would do this by:

1. Choose Print from the menu.
2. Click Volunteer list to expand your Volunteer list reports.
3. Click on the name of the report you want to modify.
4. Click the **Modify it** button.
5. Select the Include tab.
6. Under "Which volunteers do you want to include in this report?" find the Kind heading and be sure the "Both individuals and groups" option is checked as shown here.

Which **volunteers** do you want to include in this report?

Tagged volunteers ( 0)

These volunteers:

**Status**

Any

Any of these

Active       Applicant       Inactive

LOA       Prospect

**Type**

Any

Any of these

Adult       College       Group

High School

**Kind**

Both individuals and groups

Individuals only

Groups only

**Flags**

Any

Any of these

7. Save or print the report.

### Using Group Records with Checklist Items

If you use the volunteer Checklist features, you may have some Checklist items that should apply to both Group and individual records, or apply only to Group or individual records. Here is an example of how to setup a Checklist item to only apply to individual volunteers:

1. Choose Setup from the menu.
2. Click Checklists.
3. Click on the name of a Checklist item you want to change, or click the "Add a new Checklist item" link to create a new Checklist item.
4. Under "Which volunteers should this item apply to?" select "Individuals only" in the "If their Kind is" section.

Which volunteers should this item apply to?

If their Status is:

- Active
- Applicant
- Inactive
- LOA
- Prospect

If their Kind is:

- Either individual or group
- Individuals only
- Groups only

If their Type  is  is not:

5. Finish configuring the Checklist item and then click the **Save** button.

Remember that Group records represent groups of volunteers who you do not track individually. For this reason there is not a way to use Checklist items to track whether or not specific members of a group have completed a Checklist item. If you setup a Checklist item that applies to Groups, you can use the Checklist in each Group record to show whether or not the group contact completed that item.

### Using Group Records with Awards

If you use Volgistics to track and queue volunteer awards, you may have some Awards that should not apply to Group records, should apply only to Group records, or should apply to both individual and Group records. Here is an example of how to setup an Award to only apply to Group records.

1. Choose Setup from the menu.
2. Click Awards.
3. Click on the name of an Award item you want to change, or click the "Add a new award" link to create a new award.
4. Under "Volunteers receive this award only if, select "Groups only" in the "Their Kind is" section.

Volunteers receive this award only if...

Their Type  is  is not:

Their Flag  is  is not:

Their Kind is:

- Either individual or group
- Individuals only
- Groups only

Sequence:

Some awards are sequential, such as those based on 100, 500 and 1,000 hours of service. If this award

5. Finish configuring the award and then click the **Save** button.

Keep in mind that Group records represent groups of volunteers who you do not track individually. For this reason there is not a way to queue or track awards for specific members of a group who serve under a Group record. If you want to track awards for group members individually you can track those volunteers as Individuals instead of tracking them collectively as a Group.

If you setup an Award that applies to Groups, a Group will be queued for the award when the group members collectively meet the award requirements. For example, if you create an award which is given after 100 hours of service, the Group will be queued for the award if 50 members of the group each serve 2 hours.

Remember that when you have an Individual record for someone that is also a member of a Group, you will need to decide if the service applies to the Individual, the Group or both. If you want to avoid double posting the service, be careful to exclude the person from the Group count and Group hours served if you decide to track the individual's service separately. If the service credit should be applied to the Group, do not also post the service to the Individual record. You can link the individuals to the Group later by using a Flag as discussed in the sidebar on this page.

#### **Related help**

Help Topic 1990 - Tracking Multiple Contacts for a Group

Help Topic 1197 - Scheduling groups

Help Topic 1198 - Using VicNet for groups

Help Topic 1205 - Schedule Icons

Help Topic 1212 - Using VicTouch for groups

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## **Mailbox In Box Tab**

Help topic 1110

Added or revised 07-21-2016



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The Mailbox's In Box tab is the tab initially displayed after you select Mailbox from the menu. The In Box tab is used for managing incoming messages such as reports, alerts, and document zip files. Messages are identified by kind, format, date received, subject, and the System Operator to whom they were directed.

# Mailbox

In Box   Out Box   Applications   Service   Help E-mail   Documents

Refresh

**In Box**   All sites 

<a href="#">Kind</a>	<a href="#">Date</a>	<a href="#">Subject</a>	<a href="#">To</a>
<input type="checkbox"/> Alert 	10-03-2013 12:22 p	<a href="#">Declined email</a>	Jim Howard
<input type="checkbox"/> Report 	10-03-2013 12:18 p	<a href="#">Name, address and phone list (stock)</a>	Operator Volgistics
<input type="checkbox"/> Alert 	10-03-2013 12:11 p	<a href="#">Schedule change (removed)</a>	Northside User
<input type="checkbox"/> Alert 	10-03-2013 12:09 p	<a href="#">Schedule change (added)</a>	Operator Volgistics
<input type="checkbox"/> Report 	10-01-2013 4:21 a	<a href="#">Service Summary</a>	Volgistics Team
<input type="checkbox"/> Alert 	09-25-2013 12:20 p	<a href="#">New application</a>	Volgistics Team
<input type="checkbox"/> Report 	09-24-2013 9:57 a	<a href="#">Volunteer address labels (stock)</a>	Volgistics Team

Click Delete to delete the **checked** messages:

This help topic reviews some of the basic features of the In Box tab. You can click on a link in the *Contents* box below to go directly to a section of the help topic.

## Contents

- Capacity
- Alerts
- Downloads
- Reports
- Upload Alerts
- Saving Reports Locally
- Refreshing the In Box Tab
- Sorting the In Box Tab
- Deleting In Box Items
- Site Level Access and the In Box Tab

## Capacity

The In Box tab is not intended for long term storage. These rules apply to how long items remain on the In Box tab:

- Alerts are deleted from the In Box tab 180 days after they are received.
- Downloads of documents are deleted from the In Box tab 5 days after they are received.
- Reports are deleted from the In Box tab 25 months after they are generated.
- Upload Alerts are deleted from the In Box tab 5 days after they are received.
- System Operators are limited to 12 reports each. Once the 12 report limit is reached, when the operator generates a new report the oldest report run by the operator is automatically deleted.

If you need to save an item such as a report or download, you will need to save it to your local computer, network, or storage device before it is deleted. To save reports on your local system, see the Saving Reports Locally section of this help topic. To save a download of documents, see the Downloads section of this help topic.

## Alerts

Alerts received on the In Box tab are identified with the following icon:



Depending on your account setup, you could receive five different types of alert messages. These are generated for the following events:

- Subject: New application. Alerts generated when an applicant submits an online application form. Help topic 1053 shows how to add these alerts.
- Subject: Schedule change (added). Alerts generated when a volunteer adds him or herself to the schedule through Vic self-scheduling. For information on adding these alerts, see Help topic 2172.
- Subject: Schedule change (removed). Alerts generated when a volunteer removes him or herself from the schedule through Vic self-scheduling. For information on adding these alerts, see Help topic 2172
- Subject: Declined messages. Alerts generated when a Coordinator or volunteer opts-out of all email communication and text messages from your organization through the link at the bottom of an email message. For information on adding these alerts for volunteers, see help topic 1068. For information on adding these alerts for Coordinators, see help topic 1025.
- Subject: Opt-out of text messaging. Alerts generated when a Coordinator or volunteer opts-out of text messaging by texting STOP or changing their selection in VicNet.

## Downloads

Zip files of downloaded VicDocs documents may be received on the In Box when a System Operator performs an action such as deleting a volunteer record or deleting a Site, Place or Assignment record. The zip files allow you to save the documents associated with records that are deleted from your Volgistics account.

Downloads are identified with the following icon:



The first part of the Subject of the download message shows the type of record that was deleted, and the second part of the subject has the name of the record that was deleted. The chart below shows the abbreviations used for the types of records:

Abbreviation	Record Type
Asgmnt	Assignment
Coord	Coordinator
Place	Place
Site	Site
Vol	Volunteer



The zip files for downloads are only kept in Volgistics for 5 days so if you wish to keep the download of documents you will need to save the file locally before it is deleted. In most cases, you can do this by simply clicking on the Subject of the notification. Another option to download the file is to right-click on the Subject of the notification and then select "Save link as . . .", "Save target as . . ." or "Save as . . ." from the menu.

## Reports

Reports received on the In Box tab can be in Microsoft Excel format, or PDF format. Excel files appear with the following icon:

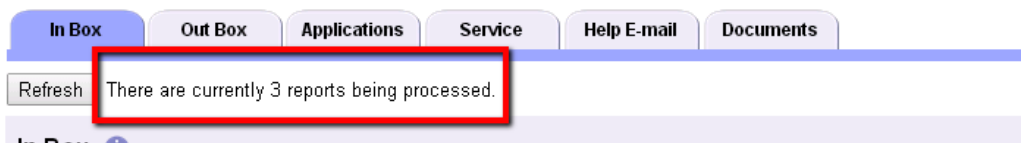


PDF files are identified with the icon shown below:



You can find information on how to print reports, plus a listing of pre-made reports, in help topic 2104 "Stock Reports." You can also customize your reports in Volgistics. You can find information on this in help topic 2223 "Creating Custom Reports."

If you have requested a report and the system is still working to compile the information, you will see a message by the **Refresh** button indicating there is a report pending. This message will indicate how many reports are currently pending for your entire account.



These could be reports initiated by a Site Level Operator other than yourself so you may not actually see the reports on the In Box tab when they are completed. The Site Level Access and the In Box Tab section below explains more about this. If you remain on the In Box tab, you will need to Refresh the tab to see pending reports that have completed since you visited the tab.

## Upload Alerts

When you upload VicDocs files, the system scans the document to check for viruses. If the scan shows a file may have a virus, the document is deleted to protect the system. When this occurs, you will receive an Upload Alert on the In Box tab. Upload Alerts are identified with the icon shown below:



The Subject of the alert shows the name of the file that was infected. Click on the Subject to learn more about the Docs tab where the upload attempt was made. The following help topics have more information about the Docs tabs where documents can be uploaded:

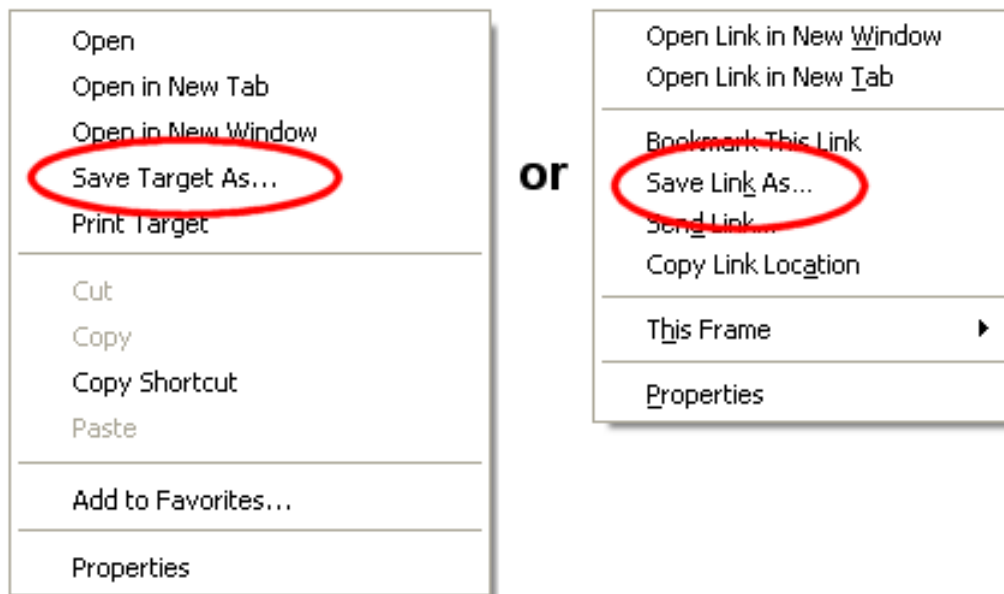
Help Topic 2548 - Docs Tab (Volunteer Records)

Help Topic 2549 - Docs Tab (Coordinator Records)

Help Topic 2550 - Docs Tab (Site, Place & Assignment Records)

### Saving Reports Locally

As noted in the Capacity section of this help topic, the In Box tab is not intended for the long term storage. To save a report to your local computer (or flash drive or other storage medium), right-click on the Subject of the report on the In Box tab and then select "Save target as...", "Save link as..." or "Save as..." from the prompt.



Then follow the steps to save the file to a local storage location. You can also save reports by opening them in Excel or Adobe Reader and then using the program to save the report. Help topic 2106 explains more about how to do this.

There is not a way to save Alerts locally without copying and pasting them into a spreadsheet or word processing document.






### Refreshing the In Box Tab

The In Box tab will show an up-to-date view each time you select Mailbox on the Volgistics menu. If you're on the In Box tab and you want to update the view without leaving the tab, click the **Refresh** button in the top left corner of the In Box tab.

### Sorting the In Box Tab

By default, the In Box tab is sorted by the Date column with the most recent items at the top.

As your In Box tab receives more items such as alerts, reports, and downloads, it may become difficult to find an item you're looking for. To help you with this, Volgistics allows you to sort the In Box by the Kind, Date, Subject and To columns. Just click on the column heading to sort the In Box by that column's information.

In Box 					<input checked="" type="checkbox"/> All sites 
Kind	Date	Subject	To		
<input type="checkbox"/> Alert 	10-03-2013 12:22 p	Declined email	Jim Howard		
<input type="checkbox"/> Report 	10-03-2013 12:18 p	Name, address and phone list (stock)	Operator Volgistics		
<input type="checkbox"/> Alert 	10-03-2013 12:11 p	Schedule change (removed)	Northside Lear		

## Deleting In Box Items

To delete an item from the In Box tab, check the box next to the item you'd like to delete and then click the **Delete** button. You can clear out your entire In Box at once by clicking the **Check all** button and then the **Delete** button.

### Please note. . .

- 1.The **Delete** buttons are located at the bottom of the tab so if your account has many items, you will need to scroll to the bottom of the tab to locate the buttons.
- 2.The In Box tab is shared by the System Operators in your account so if you don't recognize an item, you may want to check with the operator listed in the *To* column before you delete the entry.

## Site Level Access and the In Box Tab

If an organization uses Site Level Access and a System Operator is logged in as a Headquarters-level operator, the In Box tab will have a checkbox for *All Sites* in the upper right corner. If this box is checked, the operator will view reports generated by Headquarters as well as reports generated by Site-level Operators. If the *All Sites* box is un-checked, only reports generated by Headquarters will be displayed on a Headquarters-level operator's In Box tab.

Users logged in as Site-level Operators will not see the *All Sites* checkbox on the In Box tab. With Site Level Access, the In Box tab will only display reports generated at their Site.

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## Coordinators

Help topic 1111

Added or revised 03-23-2017

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In addition to tracking volunteers and Assignments, Volgistics also includes features for tracking the people who supervise or manage each Assignment, and tools these people can use to perform certain tasks without having to be Volgistics System Operators themselves. Volgistics calls the people who supervise or manage volunteers at the Assignment level *Coordinators*.

Coordinators are typically paid or volunteer staff with responsibility for coordinating or supervising volunteers in a specific Assignment. Here are some examples:

- At an animal shelter, volunteer *team leaders* coordinate the schedules for all of the volunteers in each of the shelter's Assignments. If a volunteer cannot serve as scheduled, they contact their *team leader* who handles the scheduling of a substitute. In this example, these team leaders could be Volgistics Coordinators.

- In a hospital, a hospital employee in each department is given responsibility for supervising the volunteers who serve in their department. In this example, these hospital staff could be Volgistics Coordinators.
- A *Retired Senior Volunteer Program* identifies a person at each different organization where their volunteers serve as their contact at that organization. In this example, these contact people could be Volgistics Coordinators.
- A human service agency appoints a *chairperson* for each volunteer Assignment. These chairpersons train and coordinate the activities of the volunteers in their designated Assignment. In this example, these chairpersons could be Volgistics Coordinators.

This help topic covers more about how to create and use Coordinator records in Volgistics. You can click on a link in the *Contents* box to go directly to a section of the help topic.

## Contents

The Coordinator Record  
 Connecting Coordinators and Assignments  
 What Coordinators Can Do  
 Communication for Coordinators

### The Coordinator Record

As with volunteers, each Coordinator's information is stored in their own record. You get to your Coordinator records by choosing *Coordinators* from the menu. To see Coordinators currently in your account, click on letter to see Coordinators whose last names start with that letter. Or click the *All* link to see all Coordinators in your account.

To start a new Coordinator record, click the **New coordinator** button. Enter at least a last and first name and then click the **Save** button. You can return to the record later to add more information.

The following tabs make up the Coordinator record: Coordinator tab, Assignments tab, Volunteers tab, Schedule tab and Vic tab. Each is explained below.

#### Coordinator tab

The Coordinator tab contains Name, Address, and Email (or Email and Text) Preferences boxes. It is used to store Coordinator contact information and track which types of messages they will receive.

#### Assignments tab

The Assignments tab lists the names of Assignments the Coordinator is responsible for managing or coordinating. It includes an "Add" box to add new Assignments to the Coordinator's record.

#### Volunteers tab

The Volunteers tab in the Coordinator record lists all volunteers who have one or more of the Coordinator's Assignments. A System Operator can view the list of only volunteers with the Role of "Assigned" in the Coordinator's Assignments, or volunteers with any Roles and Statuses they specify. From this tab, a System Operator can tag a Coordinator's volunteers, send a mass message to all of them, or change their Roles in the Coordinator's Assignments. The Volunteers tab on the Coordinator record works similarly to the Volunteers tab on an Assignment record. Help topic 2221 has more information about the settings on this tab.

#### Schedule tab

The Schedule tab displays the schedule for volunteers assigned to the Coordinator's Assignments. A System Operator can schedule a Coordinator's volunteers from this tab.

### Vic tab

A Coordinator's Vic tab is where System Operators manage the Coordinator's access to VicNet. If a Coordinator cannot currently access VicNet (for example, if their record lacks an email address or an organization has prevented Coordinators from accessing VicNet on the VicNet Ground rules page), this tab will display the reason. In addition, the Coordinator's VicNet password can be changed, or a password link can be sent to the Coordinator from this tab. You can learn more about this tab in help topic 1076.

**Note:** Service, including hours or any other service measures used by the organization, cannot be tracked for Coordinators. If an organization wants to track a Coordinator's hours, they must create a separate volunteer record for them (in addition to the Coordinator record). Help topic 1093 explains how VicNet works for individuals who are both a Coordinator and a volunteer.

## **Connecting Coordinators and Assignments**

In Volgistics, Coordinators and volunteers are not assigned to one another directly--they are connected only when they share the same Assignment(s).

Coordinators may have a single Assignment, multiple Assignments, or all of the Assignments at a given Site or Place.

Take the following steps to add an Assignment, Site or Place to a Coordinator's Assignments tab:

1. Choose Coordinators from the menu.
2. Click the letter of the Coordinator's last name, or the *All* link at the top of the page.
3. Click on the name of the Coordinator for whom you would like to add an Assignment.
4. Go to their Assignments tab.
5. Locate the Add box. In the Assignment dropdown field, select an individual Assignment name, or the name of a Place or Site. If a Place or Site name is selected, the Coordinator will be associated with each Assignment (or Place and Assignment) that falls under the chosen Place or Site, respectively.
6. In addition to the Assignment field, the Add box on the Assignments tab contains any Coordinator relationship fields used by the organization. Enter any appropriate information into the fields present on the Add box.
7. Click the **Save** button.

Once an Assignment (or Site or Place) has been added to a Coordinator's Assignments tab, all volunteers who have this Assignment (or any Assignment under this Site or Place) on their Service tab become this Coordinator's volunteers. See help topic 2173 to learn how to add volunteer Assignments and Roles.

## **What Coordinators Can Do**

Since a Coordinator's role is typically more limited than the role of an organization's overall volunteer leader, it usually is not necessary or desirable for an organization to make each of their Coordinators a System Operator in Volgistics. It would often not be practical to train each Coordinator in the whole Volgistics system, and it's often not desirable for these people to have as much access to Volgistics as a System Operator might.

Instead, Volgistics provides a way for Coordinators to access the system through the VicNet module. The VicNet module provides Coordinators with a simplified interface; access only to the volunteers who have the Coordinator's Assignment (or Assignments); and features for performing the most common supervisory tasks only (such as scheduling or updating contact information). Coordinators can access VicNet from any Internet connected computer--in their office, home, or even on the road. All that is required is an Internet connection.

Help topic 1093 has information on how VicNet will work if the person has a Coordinator and a volunteer record in the system.

Unlike *System Operators*, the number of *Coordinators* you add does not affect your account's Service Level. (Each *Volgistics System Operator* you add to your account after the first two increases your Service Level; however, you can add as many *Coordinators* as you need without increasing your account's Service Level). For this reason, *Coordinators* do not have access to all the same tools as *System Operators*.

One way to get an idea of what *Coordinators* can, and cannot, do is to watch the training videos designed to show *Coordinators* how to use VicNet. You can find these videos here.

There are two different videos because accounts can setup *Coordinator* access differently depending on their needs. The options for setting up VicNet for *Coordinators* are on the pages you access by selecting Setup from the menu, and then expanding the VicNet link.

### **Communication for Coordinators**

There is not a way for *Coordinators* to send messages to their volunteers, or to other *Coordinators* and *System Operators* through the system. However, a *System Operator* can send email, Vic mail, and/or text messages to a *Coordinator's* volunteers on behalf of the *Coordinator*. Help topic 2193 shows how to do this.

*System Operators* can also send custom messages to a single *Coordinator* or to all *Coordinators*. Messages can be sent by email, Vic mail or text message. In order to send text messages, your account must enable text messaging and the *Coordinator* must opt-in to receive text messages.

*Coordinators* can also receive schedule reminder messages to show them the coverage for upcoming assignments. These can be sent by email or text depending on if the *Coordinator* has opted-in for texting and his or her message preferences. You can find information on setting up daily schedule reminder messages for *Coordinators* in help topic 2494. For monthly reminders, please see help topic 2492.

*Coordinators* can also receive self-scheduling alerts to let them know when a volunteer has added and/or removed themselves from the schedule for an assignment. To set this up, go to the Rules tab of the *Coordinator's* assignment(s). You can find more information on this here.

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## **How do volunteers get started with VicNet?**

Help topic 1158

Added or revised 04-12-2017

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Many organizations wonder how they create volunteer "accounts" to allow volunteers to sign-in to the VicNet module. The good news is if the volunteer has a record in your database, the volunteer already has an "account." You can learn how volunteer records can be added to your database in help topic 2299.

Once a volunteer has a record, they will need to meet three requirements in order to use VicNet:

- They will need a Status (and optionally a Type or Flag) that is allowed to access VicNet. You control access requirements on the VicNet Ground Rules page.
- An email address on the Core tab of their volunteer record.

- The *Disable access* box on the Vic tab of the volunteer's record cannot be checked.

As long as a record meets all three items that are listed above, the volunteer will be able to use VicNet. The trick is often educating the volunteers on what they need to do. This help topic reviews some of the common strategies for using the VicNet portal, collecting volunteer information, and letting volunteers know about VicNet.

You should choose the strategy (or strategies) that works best for your organization's structure and requirements. For example, a festival may want applicants to be able to access VicNet right away without any onboarding requirements. So an option where the applicants choose their password on the application form will work best for them. However, an organization such as a hospital will likely have onboarding requirements so a method where the System Operators send login information after the volunteers are approved will work best for them.

You can click on a link in the *Content* box below to go directly to a section of the help topic.

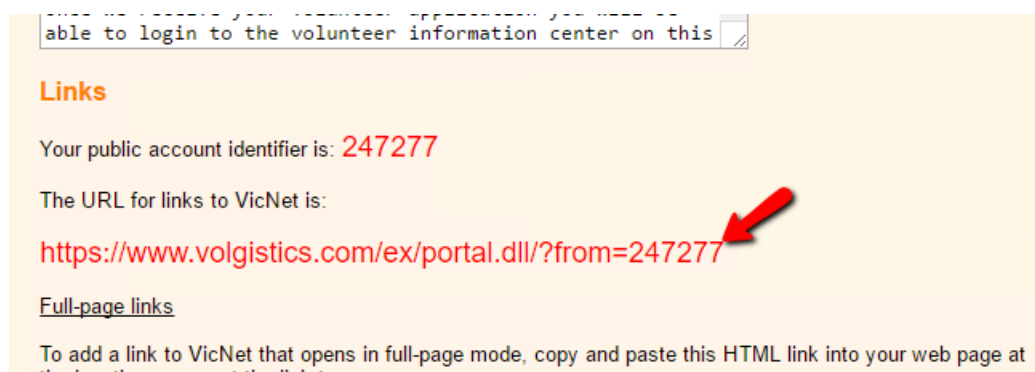
## Contents

Where is the VicNet Portal?  
Collect Login Information on Application Forms  
Send a Message with Login Information  
Use the "Need a Password?" Link  
Set a Temporary Password

## Where is the VicNet Portal?

Each Volgistics account has a unique URL address for their VicNet portal. You can find this by:

1. Select Setup from the menu.
2. Expand the VicNet link.
3. Select *Ground Rules*.
4. Scroll down to the Links heading. The URL will appear in red like the one pictured below. Please note that your account's URL will have different numbers than the one pictured.



For testing, you can simply copy and paste the URL into a web browser window. In the majority of cases, when your volunteers are ready to use VicNet you will want to place a link to the URL somewhere on your website. Or some organizations choose to embed VicNet into their web pages so it appears to be part of their website.

With this option, volunteers do not need to know the URL address for VicNet. You simply give them directions to the web page on your site where the link appears. You can find more information on how to place a link to VicNet on your organization's website in help topic 2153.

There may be some cases where an organization cannot place a link to VicNet on their website. In these cases, it is perfectly alright to give the volunteers the URL address for your VicNet portal. If you do this, you may want to encourage the volunteers to bookmark the address so you do not get repeated questions about how to get to the portal.

## Collect Login Information on Application Forms

If your applicants will be accessing VicNet soon after they apply, you may want to collect the email address and password from your volunteers right on your application form(s). This option works well for accounts that use Volgistics for events such as conferences or festivals where there may not be a long approval or onboarding process.

You can create a section on the application form just for the VicNet access information, and link the email and password fields to the form section. You link fields to a form section by selecting the *Fields* link on the application form's setup page.

With this method, you can place directions about the location of your organization's VicNet portal right in the instructions field of the form section. Or you could give directions with the receipt confirmation feature. This could be a page applicants view after they submit the form, or an automatic email sent to the applicant after they submit the form. If you send it as an email message, volunteers could find the directions again by referring back to the email message.

Here is an example of how this option may look on your application form:

Work phone:   OK to call me here

**Volunteer Information Center (VicNet)**  
You will schedule yourself for shifts through the Volunteer Information Center (VicNet). Please enter the email address and password you'd like to use to access VicNet. Once you've been approved, you can sign-in to VicNet by:

1. Go to our website ([www.organization.org](http://www.organization.org))
2. Select the Volunteer page.
3. Click the 'Volunteer portal' link.

Email address:  \*

Please enter a password that:

- Is between 6 and 30 characters long
- Contains both letters and numbers.
- Contains a combination of both uppercase and lower case letters.
- Contains at least one character that is not a letter or number, such as !#\$% or ?.

Password:  \*

Confirm password:  \*

**Emergency Contact**  
In the event of an emergency, whom should we notify?

**Please note:** If your application forms are setup to be audited, you will need to receive the application into your database, and the volunteer must meet the three requirements at the top of this help topic, in order to sign-in.

## Send a Message with Login Information

If your volunteers need to go through some sort of an approval, or onboarding, process before they can serve, you may want to send them an email message they can use to get their login information. Volgistics has a template you can use to customize a message to use for this email. The same template is used for three



purposes: 1) when the message is sent by a System Operator to volunteers, 2) when the message is sent by a System Operator to Coordinators, and 3) when the message is sent because volunteers or Coordinators request a password on the VicNet login page.

Because of this, you may want to keep the content of the message generic so that it works for all three purposes. However, it is still useful to give directions on how users login in the message. You customize this message by:

1. Select Setup from the menu.
2. Expand the VicNet link.
3. Select *Ground Rules*.
4. Scroll to the *Password email* section and customize the message.
5. Click the **Save** button to keep your changes.

You can see a sample of what you could enter as the message's content below:

Expire every  days

### Password email

Volunteers and Coordinators can receive a link to set their password by email. You can customize the content of this message below. Volgistics inserts the person's login name (email address), and the password link, between the Top and Bottom parts

Top part:

```
Thank you for serving at "My organization." You can find login information for the Volunteer Information Center (VicNet) below. Click on the link to set your password. After you have successfully set a password, you will be directed to the login page.
```

Bottom part:

```
To login to VicNet in the future:  
1. Go to our website (www.organization.org)  
2. Select the Volunteer page.  
3. Click on the "Volunteer portal" link.  
4. Enter your email address and password.  
  
We appreciate your service! Please contact Jessica in Volunteer Services (555-444-3333) if you have trouble logging-in.
```

What should the subject line be for VicNet password emails?

### Heading

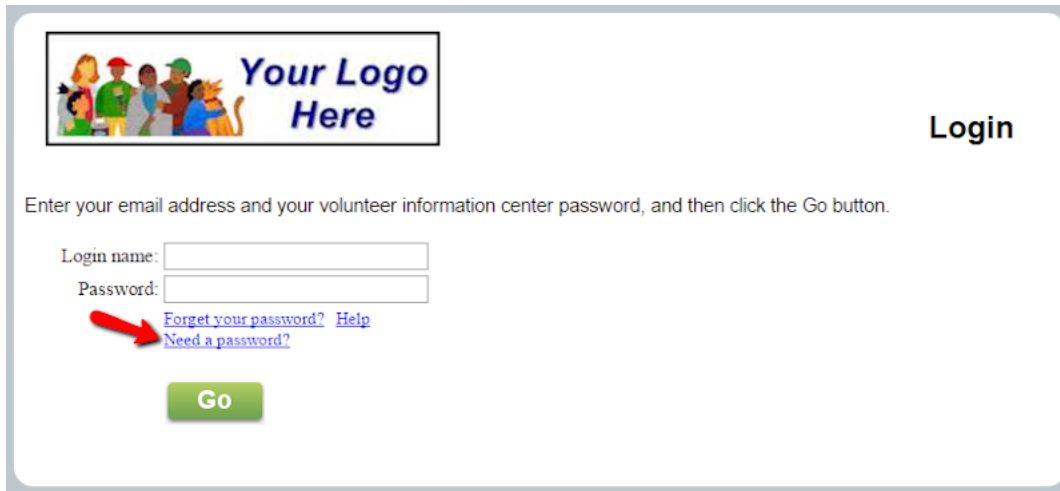
You can send the email with the link to individual volunteers and Coordinators on the Vic tab of their records. There is more information on how to do this in help topic 2234.

You can also send the email with the link to multiple volunteers at once by tagging the volunteers you want to send the email to. You can find information on how to do this in help topic 2233.

## Use the "Need a Password?" Link

You may have a situation where you want your volunteers or Coordinators to get their own passwords so they do not need to rely on a System Operator. For example, if once the volunteers are approved to serve, you provide them with a packet of instructions on what to do next.

In this case, your volunteers can get their own passwords as long as your instructions include the location of your VicNet Portal, and they meet the three requirements to use VicNet. To do this, they will go to the login page for VicNet, and click the *Need a password?* link.



This will take them to a page where they can enter their email address to have the password link sent to them.

## Set a Temporary Password

There may be times when you want to set a temporary password that volunteers use to login to VicNet for the first time. For example, if you have volunteer orientations where you will train groups of volunteers all at once, you can set the same temporary password for the entire group and tell them the temporary password. Or, you may give out new volunteer packets where you have instructions on how to login and you give the temporary password in the instructions. When volunteers login with the temporary password the first time, they will be prompted to select a permanent password.

You can set a temporary password for volunteers (or Coordinators) on the Vic tab of their record.

You can also set temporary passwords for multiple volunteers at once by tagging the volunteers. You can find information on how to assign a temporary password to tagged volunteers in help topic 2137.

## Did you know?

Volgistics has resources you can use if you conduct trainings or orientations for new volunteers. There are video tutorials you can download here. There are also help topics you can direct volunteers to online, or you can print the help topic out for a handout. The help topic for the desk top view is help topic 1148. The help topic for the mobile view is help topic 1215.

If you are bringing in new volunteer records to your account using the free Import Utility program, you can also bring in a temporary password for the volunteers. This works well if you are just getting started with Volgistics and previously used another program that the volunteers accessed with a password. You can learn more about the free Import Utility program here.

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## Message Ground Rules Setup Page

Help topic 1200

Added or revised 06-14-2016

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You use the Message Ground Rules setup page to configure default email properties for email you send through Volgistics, as well as enable or disable text messaging for your account. To get to the Message Ground Rules setup page, choose Setup from the menu, click on Messages, and then choose Ground Rules.

### Automatic email

#### Volunteer reply-to address

Enter the email address you want to appear as the "reply-to" address on email messages you choose to have sent automatically. This will be the email address that email will go to if a volunteer recipient clicks the "Reply" button in his or her email program to reply to an automatic email message he or she has received.

If you have a general email address for your volunteer program (such as "volunteer@youragency.org") this is typically a good email address to use for this purpose, however you can enter any valid email address you want replies from volunteers to go to--with the exceptions noted below. You must enter a valid email address in this field. This field cannot be left blank.

**Please note** that some Internet Service Providers (ISP's) and Email Service Providers (ESP's) have started to block email messages when certain email domains are used as the reply-to address. At this point, only "@yahoo.com" and "@aol.com" email addresses are affected so these should not be used as your reply-to address if possible. Other general domains (such as "@gmail.com," "@hotmail.com," etc.) may follow so if possible we recommend using an email address with a domain specific to your organization as your reply-to address.

If you must use an AOL or Yahoo email address, you will need to change your *From address* setting to use **VolunteerMail@volgistics.com**. There is more information on this in the *From address* section below.

Automatic email to volunteers can include:

- Monthly schedule reminders
- Daily schedule reminders
- Checklist item expiration reminders
- Requests for forgotten VicNet passwords

You choose which kinds of automatic email volunteers receive on other Setup pages.

#### Coordinator reply-to address

Enter the email address you want to appear as the "reply-to" address on email messages you choose to have sent to Coordinators automatically. This will be the email address that email will go to if a Coordinator recipient clicks the "Reply" button in his or her email program to reply to an automatic email message he or she has received.

You can enter any valid email address you want replies from Coordinators to go to--with the exceptions noted in the *Please note* box above. This can be same email address you use for your *Volunteer reply-to address*, or it can be a different email address if you want email from Coordinators to be sent to a different email address than email from volunteers.

You must enter a valid email address in this field. This field cannot be left blank.

Automatic email to Coordinators can include:

- Monthly schedule reminders
- Daily schedule reminders
- Requests for forgotten VicNet passwords

You choose which kinds of automatic email Coordinators receive on other Setup pages.

#### Email signature block

Optionally enter the signature block you want to appear at the bottom of email messages sent automatically by Volgistics. A signature block typically includes the sender's name, title, and contact information.

#### **HTML email default style**

Choose the font, font size, and font color you would like the text in your email messages to normally use.

#### Font

Choose the default font for your HTML formatted messages. You can choose Arial, Comic sans ms, Courier new, Georgia, Lucida sans, Tahoma, Times new roman, Trebuchet ms, and Verdana. The Default is the Arial font.

#### Font size

Choose the default font size for you HTML formatted messages. You can choose a font size of 8, 9, 10, 11, 12, 13, 16, 18, 20, 22, 24, 26, 28, 36, 48, or 72. The default is font size of 12.

#### Font color

You can choose a default font size for your HTML formatted messages. You an choose one of 40 preset colors. The default is Black.

#### Sample

The sample section will show you the results of any changes you make to the Font, Font size, and Font color settings above. For example if you choose the Georgia font, a font size of 18, and a font color of red then the Words "Sample message text" will reflect those choices under the Sample section.

#### **Closing message**

Many organizations include a standard message at the bottom of all of the email messages they send. Such a message might include a statement of the organization's mission; or a confidentiality or privacy policy.

If you would like email you send through Volgistics to include such a message, enter (or paste) it here. This message will automatically appear near the bottom of all email you send through Volgistics, including messages sent to volunteers and Coordinators by System Operators as well as automatic email sent by the system.

#### **Email Authentication**

In order to help insure email delivery, Volgistics uses the Sender ID method of email authentication. With Sender ID, the mail your organization sends to volunteers through Volgistics can be verified more accurately by recipient mail systems, often bypassing spam filters and giving your email a better chance of reaching all volunteer recipients.

You can choose to let Volgistics handle Sender ID for you, in which case there's nothing more you need to do for email authentication to happen; or – if your organization has its own Internet domain – you can add volgistics.com to your domain's authorized email senders to provide Sender ID authentication yourself.

With either option, you still send email through Volgistics the exact same way, and email is still delivered by Volgistics mail servers.

Your selection here controls Sender ID email authentication for all of the email you send through Volgistics, including automatic email such as checklist and schedule reminders.

Help topic 1116 - Sender ID explains more about these options.

### **From address**

An email domain is the portion of the email address after the at (@) sign. For example, if your organization's name is *Volunteer Agency* your email address may end with a domain like *@VolunteerAgency.org*.

In some cases, using a *from* email address with your organization's domain when you send email messages can cause the messages to fail. This is because the messages are blocked by your organization's network to prevent spamming. Also, as noted in the warning box above, using a reply-to address with a domain of AOL.com or Yahoo.com can cause messages to fail due to policies put in place by internet and email service providers.

To help get messages through in these cases, the Volgistics system can be configured to use a *from* email address that is the same as the reply-to address for the type of message being sent, or it can be configured to use a *from* address of **VolunteerMail@volgistics.com**.

If your messages are not being delivered, we recommend using the *Use VolunteerMail@volgistics.com* setting. This will help the messages get through any blocks your organization may have, and it will bypass the AOL and Yahoo restrictions put in place by internet and email service providers.

You should also make sure volunteers and Coordinators have their email accounts setup so that messages from VolunteerMail@volgistics.com are on the safe sender list. Some refer to this as "white-listing." You can find more information on how volunteers and Coordinators can white-list the Volgistics email addresses in help topic 2046.

### **Opt-out message**

All email sent through Volgistics includes an opt-out message for proper email etiquette. Use this section to choose the opt-out message terminology you prefer. There is not a way to omit the opt-out message, for the reasons provided in help Topic 2101 – "Why It Is Important to Provide Message Opt Out Features."

### **Text Messaging**

This section of the page is used to enable or disable text messaging for your account. If you are not a Volgistics Administrator for your account, or if your account does not include the VicNet module, the options in this section will be disabled.

### **Text Message Opt-in Email**

If your account does not have text messaging enabled, you will not see this section. This section is designed to assist organizations in letting volunteers and Coordinators know that text messaging is available. You can edit the content of the email message that is sent, as well as send the message to all Coordinator records in your account. To send the message to all of your Coordinators, click the **Send to all coordinators** button at the bottom of the page.

To send the message to volunteers, you will tag the records you want to send the message to. Then select Tags from the menu and press the **Go** button beside the option to send the opt-in message. You can learn more about this in the Send the text messaging opt-in email to the tagged records section of help topic 2137.

#### Related help

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## Starting VicTouch

Help topic 1203

Added or revised 05-13-2016

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These are the steps for starting VicTouch on a short-term basis. The VicTouch module will be fully functional with this start-up method, but it will not fill the entire screen. This allows volunteers access to the browser controls—including the menu and tool bars—*which compromises the workstation's security*.

**For long-term installations, we recommend launching the VicTouch module in kiosk mode.** This will cause the module to fill the entire monitor screen and give the most secure access. Help topic 2289 "VicTouch desktop shortcuts" shows how to do this.

To launch VicTouch at a temporary location:

1. Start your web browser and navigate to <https://www.volgistics.com/touch>

**To start VicTouch at this computer, enter your Volgistics account number, login name, and password; and then click the Continue button.**

Account number:

Email address:

Password:



2. Enter your Volgistics login credentials and click **Continue**. Note that launching VicTouch does not count as a regular Volgistics session. So you'll still be able to use Volgistics on a separate computer without ending the VicTouch session.

3. Verify your time zone.
4. Be sure your browser is maximized. VicTouch determines how much space it can use when it is first launched, and retains that number throughout the session. So if you launch VicTouch and then increase the size of the browser, VicTouch won't be able to use the full screen.
5. You'll see some information about creating a desktop shortcut for VicTouch for long-term use. Read this and then click **Continue**.

#### **Related help**

Help Topic 8270 - Setting-Up Internet Explorer for VicTouch

Help Topic 8271 - Setup a VicTouch computer

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## **Customizing VIC Mobile Graphics & Styles**

Help topic 1214

Added or revised 08-04-2015

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Organizations may customize the graphic images and styles volunteers and Coordinators see when they use VicNet on a mobile device such as a smart phone or tablet. You may wish to do this if you want a truly "branded" and integrated look. Or you might want to do this to tailor the user's experience on their mobile device.

**Please note:** To make the user's VicNet experience mobile friendly, certain options available with the *full-site* setup for VicNet are not available. For example, the options to layout the Home tab in three vertical columns and to have the schedule display in a calendar format are not available. If your full-site setup uses these display options, the mobile view of VicNet will automatically convert them into a mobile friendly format. We recommend previewing the user's VicNet experience as shown in help topic 2159 to make sure VicNet displays how you want it to for mobile users.

To get to the setup page where you can customize VicNet for mobile devices:

1. Select Setup from the menu.
2. Expand the VicNet link.
3. Select *Mobile Graphics & Styles*.

The settings for the mobile view of VicNet are different than the settings for the *full-site* view of VicNet. The full-site view is what users see if they login to VicNet on a desktop or laptop computer. If you want to change the full-site view's graphics and styles:

- See help topic 1187 to update the logo.
- See help topic 1052 to update the fonts and background colors.
- See help topic 1075 to update the button and tab graphic images.

You can click on a link in the *Contents* box to go directly to a section of the help topic.

#### **Contents**

Volunteers and coordinators can...

Organization Logo (specifically for mobile VicNet)

Colors

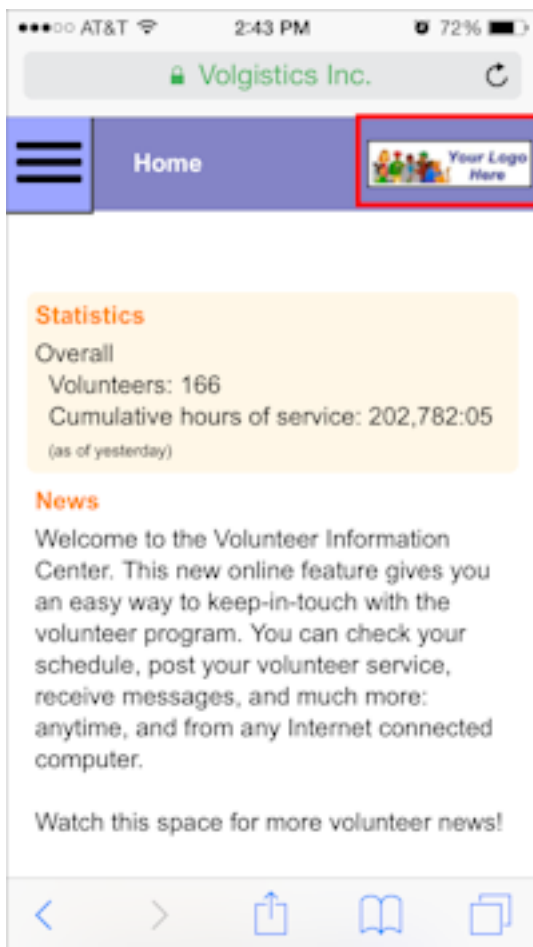
Expanding Menu Items  
Buttons  
Instructions

### Volunteers and coordinators can...

By default this box is checked so that your volunteers and Coordinators will see the option to sign-in to the mobile friendly view of VicNet at the volunteer portal when they are using a device such as a mobile phone or tablet. If you do not want your volunteers and Coordinators to be able to access the mobile view, uncheck the box in front of *Access the mobile version of VicNet* and then click the **Save** button.

### Organization Logo (specifically for mobile VicNet)

You will need to upload a separate image file if you want your organization's logo to appear on the mobile view of VicNet. When a file has been uploaded, it will appear in the top right corner of the VicNet page.



You may want to reduce the dimensions and optimize your organization's logo file that was used for the *full-site* version. This is because larger image files increase loading times, plus your volunteers and Coordinators may pay for their data plans with their wireless carrier. Most graphic or photo editing software programs or services have options to change a file's dimensions and to optimize the file when it is saved. Optimizing the file reduces the amount of resources required to store the file, as well as the bandwidth required to transmit the file.

There are not any height or width restrictions for the images, but the file size itself cannot exceed 48 KB. Acceptable file formats for the logo are GIF, JPG, or PNG.



To upload an image file:

1. Click the **Choose File** or **Browse** button.
2. Select the image file you want to upload and click the **Open** button.
3. Click the **Upload** button.

## Colors

This section allows you to customize the colors used for the VicNet display when it is viewed from a mobile device. The default values use the colors from the Volgistics system. You can optionally choose a different color for the different elements of the VicNet mobile display. If your organization has a web master who maintains your website, you may be able to contact him or her to find the values to enter to customize the display with your organization's color schemes.

Enter font colors in RGB color notation (see "*A note about RGB color notation*" below for a description of RGB color notation). You can also click in the field to bring up a color picker that you can use to select the color.

### A note about RGB color notation

There are several fields on this page for setting background and font colors. Enter color information in these fields using standard hexadecimal RGB color notation. This is the color notation used in HTML (Hypertext markup language) to specify color attributes for web page elements. Hexadecimal RGB color notation includes the '#' character followed by a six character RGB color value in hexadecimal notation (hex).

These are some examples of this notation:

#FFFFFF (white)

#000000 (black)

#FF0000 (red)

#00FF00 (green)

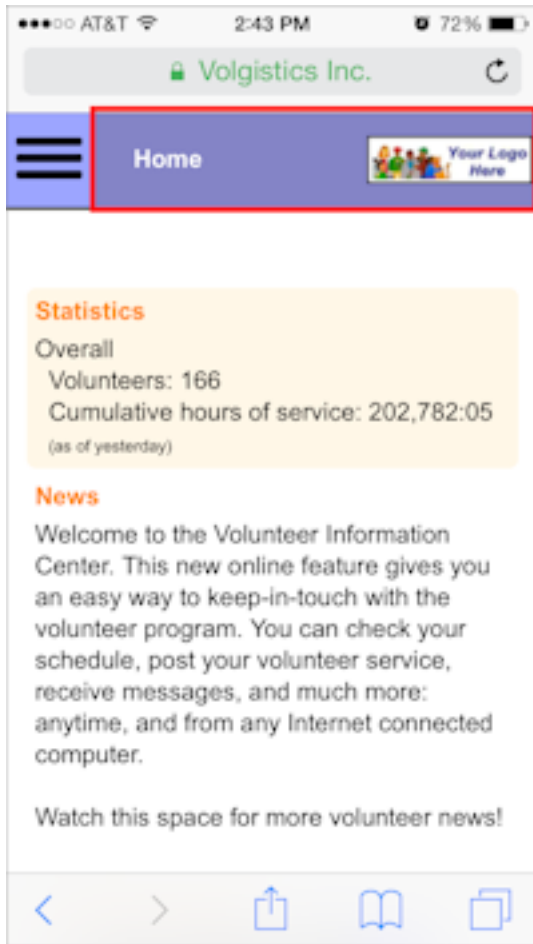
If you click on the field itself, a color picker will appear that makes it easy to select the color you need. You can also learn more about hexadecimal RGB colors for websites at [w3schools.com](http://w3schools.com)

Your color choices will be shown in the mock-up section to the right as you make the changes. You can also preview the mobile display for volunteers or Coordinators. Help topic 2159 shows how to do this. *Remember to click the **Save** button when you are done selecting your color choices!*

Here is more information about what each color selector field will change for the VicNet mobile display:

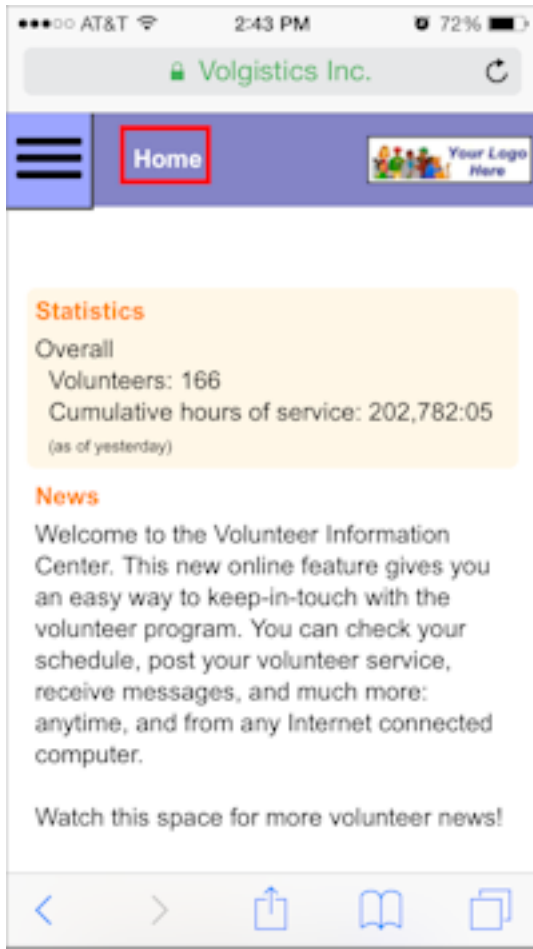
### Header section: Background color

This controls the color used in the header at the top of the screen.



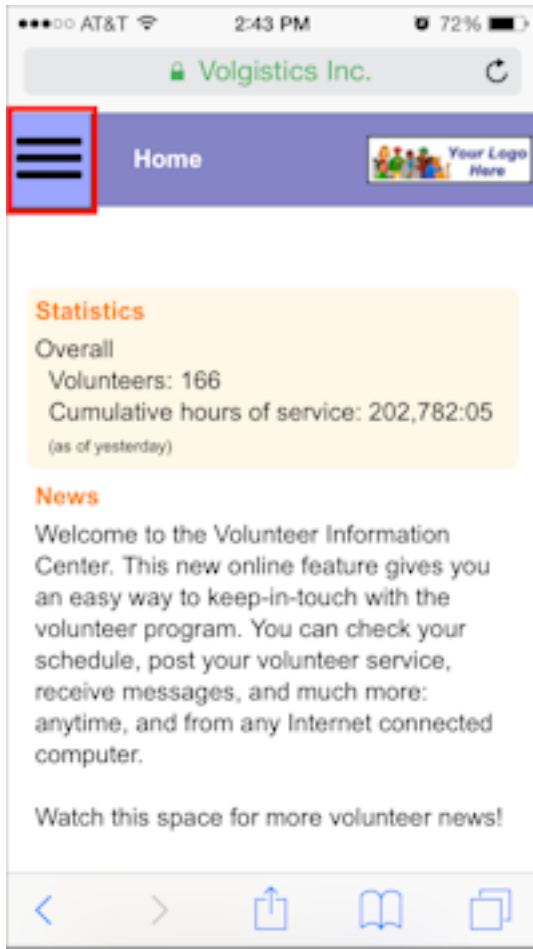
**Header section: Font color**

This controls the color of the text that appears in the header at the top of the screen.

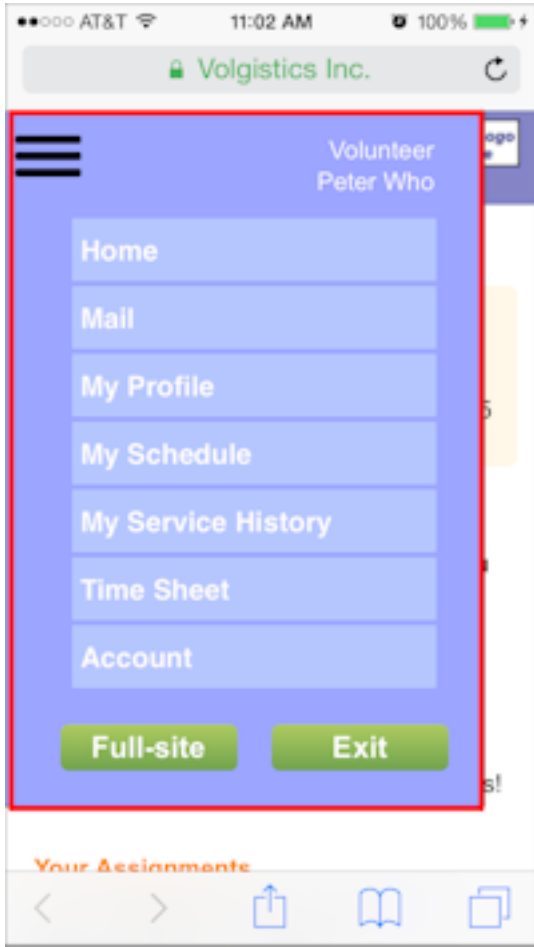


**Expanding menu: Background color**

This controls the color of the menu users tap to see their choices to navigate. When the menu is collapsed, this is the small box in the top left corner of the header section.

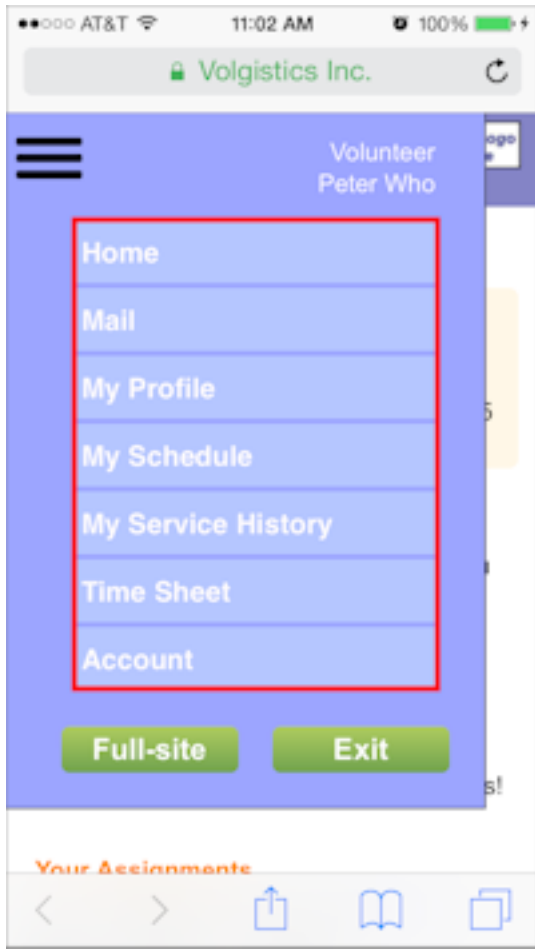


When the user taps the menu, it expands to fill more of the screen so users can tap the area they want to navigate to.



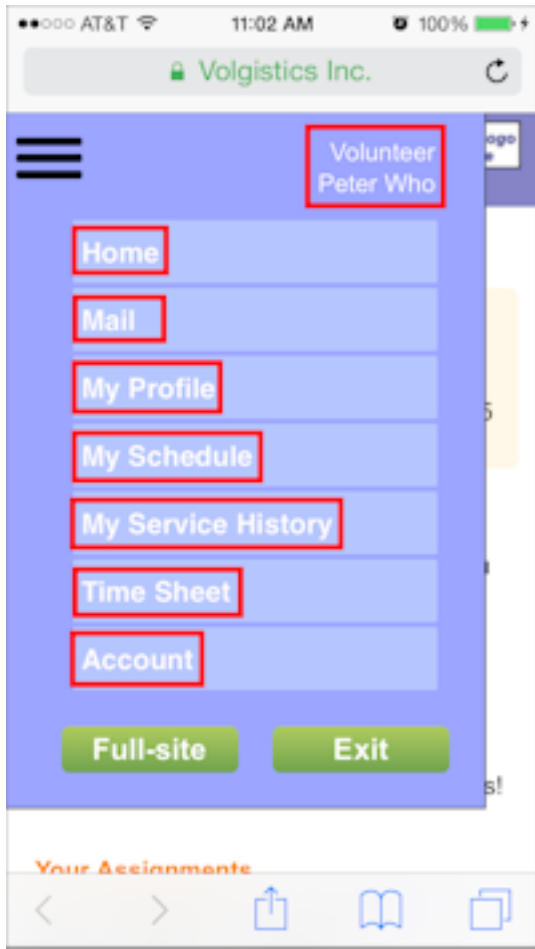
**Expanding menu:** Background color of buttons

This controls the color of the buttons on the expanding menu.



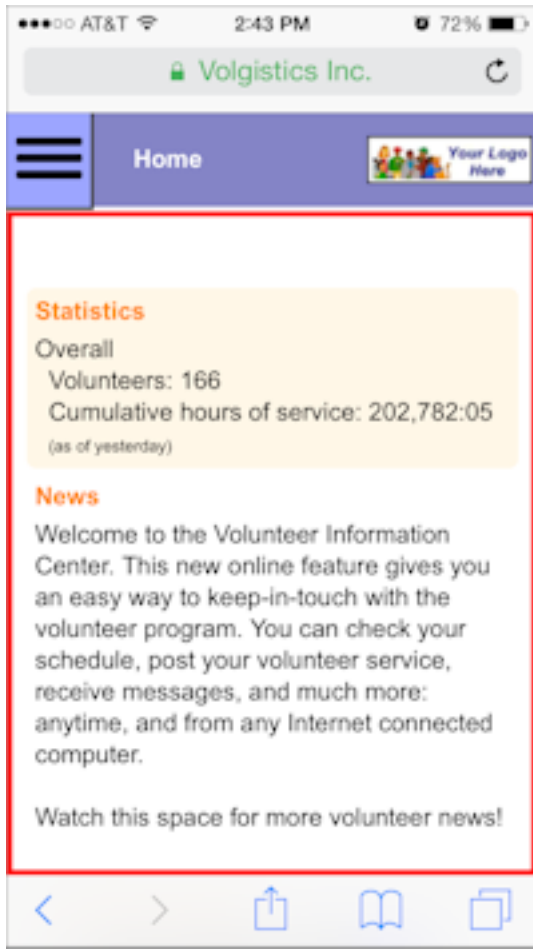
**Expanding menu:** Button font color

This controls the color of the text labels on the buttons that users tap to navigate to a certain area. It also controls the color of the text used for the user identification label.



**Main section:** Background color

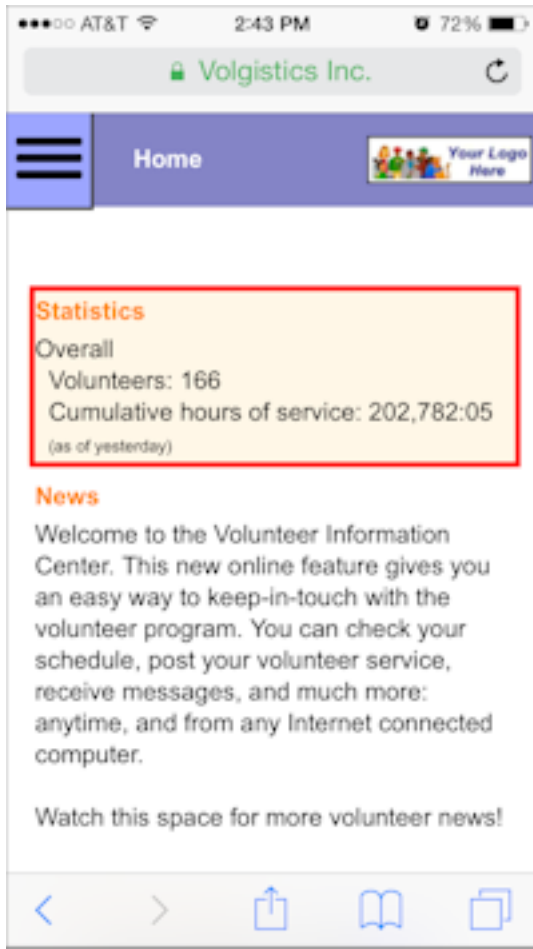
This controls the color of the section that appears under the top header.



**Main section:** Background color of boxes

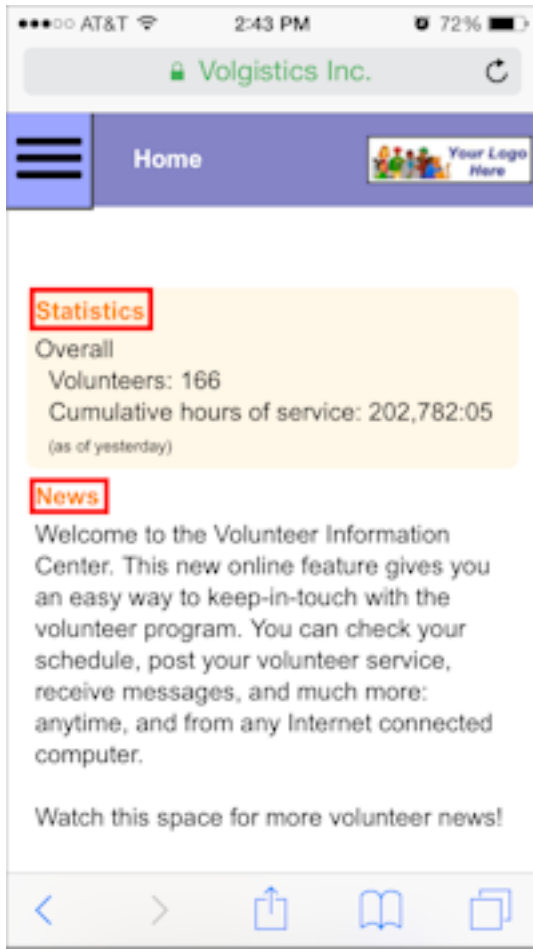
This controls the color used in the background on any boxes that appear in the main section.





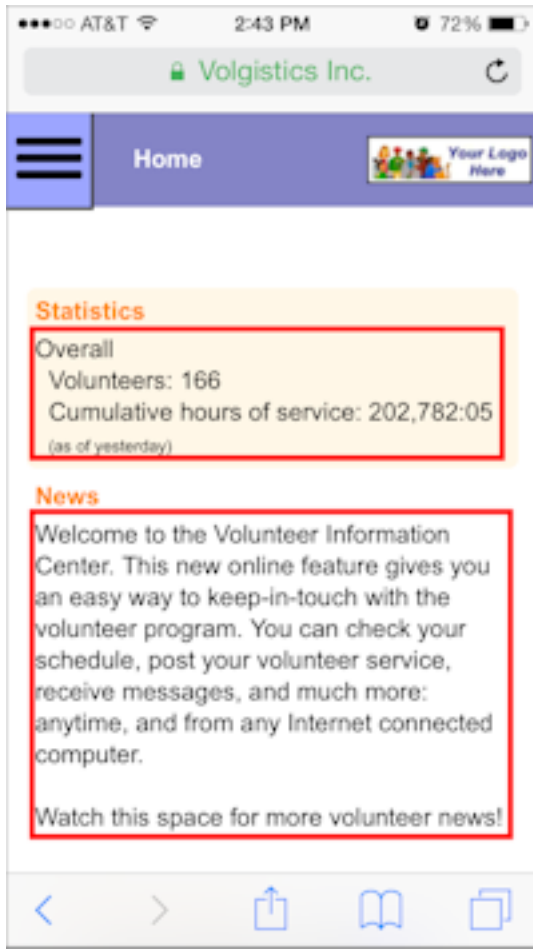
**Main section:** Color of heading fonts

This controls the color of the text used for each section's heading.



**Main section:** Color of body fonts

This controls the color of the text used for the body paragraphs in the sections.



## Expanding Menu Items

The names for the items in the expanding menu are originally taken from the *Mobile text for tab* field on each tab's setup page. The seven default tabs for volunteers are:

- Home
- Mail
- My Profile
- My Schedule
- My Service History
- Time Sheet
- Account

Coordinators may have access to the Home, Mail, My Schedule, and Account tabs, as well as a Volunteers tab.

**Please note:** The list will contain text for each item even though you may have a tab setup so that the users do not have access to the tab in the full-site view of VicNet. If this is the case, the item will not appear in the Expandable Menu in the user's mobile view for VicNet.

If you already have a different name recorded in the *Mobile text for tab* field on the tab's setup page, this will appear instead of the default text.

You can change an item in the expandable menu by placing your cursor in the field, deleting the current text, and then entering in the new text. Be sure to click the **Save** button to keep your changes.

**Please Note:** The text entered in the *Expanding Menu Item* fields will not change the name of the tabs that appear when volunteers and Coordinators view the *full-site* view of VicNet. Entering a label here will change the text displayed in the Expandable Menu when users view the mobile version of VicNet, as well as the name used for screen-readers and alternate (alt) text in the full-site view.

For the *full-site* view of VicNet, the tab names are actually part of the image files used for each tab. If you'd like to change the tab name for the full-site view, you will need to upload new image files for the tab that have the new tab name you'd like. You can find more information on this in help topic 1075.

*To help prevent confusion for your users, we recommend that the expanding menu items in the VicNet mobile view match the names on the tab graphics used for the full-site view of VicNet.*

## **Buttons**

Organizations may customize any of the graphic images for the buttons that appear in the mobile view of VicNet. Volgistics does not include any graphic or image editing software, but there are a variety of sources you can use to create graphic images. These include programs that come with your operating system, software you purchase or download from software vendors, and online image editing or button generator programs.

Some general things to keep in mind if you want to customize the graphic images are:

### File Formats

Custom images must be in one of these graphic file formats: GIF, JPG, or PNG. You will get the best results with files saved in PNG format.

### Maximum Dimensions

Each graphic image has a maximum height and width in pixels. Your files can be a maximum of 350 pixels wide and 100 pixels high. You may need to preview the mobile view of VicNet to make sure the button images look like you want them to. If they do not, you will need to re-size the image using whatever outside program you have for image files. After you do this, upload the re-sized image to Volgistics.

### Maximum Size

To ensure fast load times for the VicNet mobile pages, each graphic image has a maximum image file size in bytes. The button images must be 6,144 bytes (6 KB) or smaller. When you save your files, most image editing programs have an option to optimize the file to reduce the file size.

### Background Color

Your custom images should either have a transparent background, or use the same background color as your forms. You can learn how to customize the color for the VicNet mobile view in the Colors section above.

### Graphic Image Rights

You can copy and modify the default graphic images that are part of Volgistics, as long as you use these images in Volgistics only. Volgistics does not grant rights to use its images for any other purpose, or for use outside of Volgistics.

If you're using graphic images you've obtained from other sources, you must be certain that you have the legal right to use those images. Unless an image is offered for use without restriction, most of the graphic images that appear on the web are protected by copyrights. Be certain you have the proper rights before installing custom graphics you have obtained from others.

## Installing New Button Graphics

Once you have your new image file for the button you want, you can install it by:

1. Click on the button that you would like to replace.
2. Be sure the radio button is on *Install a new graphic*, and click the **Choose File** or **Browse** button.
3. Find the file you want to upload and select it. Then click the **Open** button.
4. Click the **Install** button.

## **Instructions**

The instruction fields that appear on the tabs in the *full-site* view of VicNet will be used for the instruction fields on the mobile view also. You may want to modify the instructions that are used so that they apply to both instances.

The Expanding Menu Items section above lists the possible tabs for volunteers and Coordinators. To review the instruction fields and edit them if necessary, you will need to go to the setup page for the tab that you want to review and/or modify. Here is an example of how to do this for the *Home tab*:

1. Select Setup from the menu.
2. Expand the VicNet link.
3. Select the *Home tab* (or whichever tab you want to review and/or modify).
4. Review the content in the instruction fields and make sure it makes sense for users in both the full-site and mobile views. If it does not, make any changes necessary. It may help to preview the mobile and regular views volunteers and Coordinators see. Help topic 2159 shows how to do this.
5. Click the **Save** button to keep the new content in the instructions fields if you made changes.

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## **How Volunteers & Coordinators Opt-in & Opt-out of Text Messaging**

Help topic 1291

Added or revised 01-15-2015

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*This help topic is designed to show volunteers and Coordinators how to opt-in and opt-out of text messaging so they can receive text messages from the organization where they serve.*

You can click on a section of the help topic in the *Content* box below to go directly to that section.

### **Contents**

- Opt-in Process
- Opt-out Process & Changing Message Preferences
- Resume Opt-in
- If Your Phone Number Changes

## Opt-in Process

Follow the steps below to start receiving text messaging from the organization you serve with.

### 1. Sign-in to VicNet

You use your VicNet account at the organization you volunteer at to opt-in to text messaging and control your text preferences. The VicNet account is necessary so the opt-in process complies with Federal communication regulations that specify that you can select what types of text messages you want to receive.

Most organizations place a link to VicNet somewhere on their web site. The login screen for the portal will look something like this:



Enter the email address the organization has on file for you along with your VicNet password. If you forgot your password, you can find assistance here.

If you are unable to sign-in, please contact the volunteer office at the organization where you serve.

### 2. Go to the Account tab

Once you have signed-in, select the Account tab.



Some organizations may customize VicNet and/or the tabs so your account may look different and the tab may not be called *Account*. However, the tab you need will always be on the far right side. Some organizations may also place a **Text message opt-in** button on the Home tab. If you click this button you will be taken directly to the Account tab.

### 3. Enter your mobile device number and select your country

Type your mobile (cell) phone number into the *Enter a mobile phone number* field. There is not a need to enter a "1" or a country code in front of the number.

## Volunteer information for Jennifer Tutone

[Home](#)[Mail](#)[My Profile](#)[My Schedule](#)[My Service History](#)[Time Sheet](#)[Account](#)

### Message Preferences (Email / Text Messaging)

Use this section to opt-in and opt-out of text messaging (also known as "SMS"). You can change preferences for how you would like to receive messages, whether as emails, text messages, or none.

#### 1. Please Enter Your Mobile Device Number:

Volgistics Volunteer Alerts sends reminders, alerts, and custom messages from System Operators and Coordinators using text messaging (SMS). Please tell us where we can send messages:

Enter a mobile phone number

*This is a required field.*

Your country

*If outside U.S., this will help us determine which Country Code & format to use.*

**Supported Carriers:** AT&T, Sprint, Nextel, Boost, Verizon Wireless, U.S. Cellular®, T-Mobile®, Cellular One Dobson, Cincinnati Bell, Alltel, Virgin Mobile USA, Cellular South, Unicel, Centennial and Ntelos.

Use the *Your country* dropdown list to select the country your phone plan (or phone number) originates from.

The *Supported Carriers* list may not include the specific provider you use if you are outside of the United States. However, you should still be able to receive text messages.

#### 4. Select your preferences for how you would like to receive messages

Use the radio buttons by a message type to select how you would like to receive that type of message.

2. How do you prefer to receive these types of messages?

Automated Messages		
Text		
Email	Message	None
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

Schedule reminders  
Schedule alerts! Handy reminders to help you remember when you're scheduled to serve. Please remember to let your team leader know if you cannot make it!

Checklist reminders  
Reminder messages to help you remember if you're due for things such as training, TB tests, flu shots, etc.

Custom Messages		
Email with Text Notification		
Email	Message	None
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

Continuing education  
Be all that you can be! Updates on education programs including new course offerings, and times and locations for classes.

Electronic newsletters  
Stay informed! News about what's happening in the Volunteer Services Department.

Important information  
Only used to communicate important news that affects you. Please DO NOT opt-out of this type of message. We will only use it when we absolutely must get in touch with you.

Recruitment appeals  
We need you! Stay informed of new opportunities to serve.

Team leader update  
Information for Coordinators who lead volunteer teams. Volunteers will not need to opt-in to this message type.

Volunteer group update  
Information for volunteer group leaders. Individual volunteers will not need to opt-in to this type of message.

Messages can be sent just by email, by email with text notification, or you can select not to receive a certain type of message at all by selecting *None*. If *None* is selected for every message type, you will be opted-out of messaging.

When *Email with Text Notification* is selected, if the message is small enough that the entire message can be sent by text, you will only receive the text. However, if the message is too large for a text, you will receive the actual message by email (or on the Mail tab of VicNet) and a text to alert you that you received a message.

**Please Note:** Because text message delivery is often faster than email message delivery, you may receive the text notice that you have an email message before the actual email message is delivered. If the email message does not appear when you check the first time, please wait and try again later.

### 5. Select the time range for when you'd like your automated messages delivered

Use the *Time Zone* dropdown to select the location you're in and then select the start and end times for message delivery.

3. When would you like to receive *automated* messages, such as schedule reminders?

Between these hours:  and

Your time zone:




The system will attempt to deliver your automated messages (Schedule and Checklist reminders) as close to the beginning time as possible. However, conditions such as the number of messages being sent, the load at the wireless carrier, and the geographic region you're in may cause the messages to arrive later in the time period or not at all.

**Please Note:** These settings only control the automated messages sent by the system. Custom messages from the account holders are processed as soon as they are sent so they may be delivered outside of the time range selected.

#### 6. Agree to the Terms and Conditions set by Volgistics

Check the box to indicate you agree to the Terms and Conditions Volgistics requires to participate in text messaging.


 4.  I agree to the Volgistics Terms and Conditions.  
[Click to view the full Terms & Conditions and Privacy Policy.](#)

You can click the link to view the Terms and Conditions, or view them here.

**Please Note:** Depending on your mobile plan, you may be charged for text messages. By opting-in to text messaging you agree that any charges for text messaging or data use, caused by messages received as a participant are not the responsibility of Volgistics or the organization you serve with.

#### 7. Agree to any additional Terms and Conditions set by the organization you serve at

The organization you serve with may have additional Terms and Conditions they require for texting. In this case, you must check the box to indicate you agree to the additional Terms and Conditions set by your organization.

 5.  I agree to the Terms and Conditions below, established by Great Lakes Volunteers.  
By participating in the texting program you agree not to receive or send texts while operating a vehicle. You also agree not to receive or send texts while working in locations in the facility designated as "No Texting" zones.

#### 8. Click the Save button

Click the **Save** button at the bottom of the page to keep your settings.

#### 9. Confirm that you have read the alert box

A pop-up window will appear reminding you that the next step of responding **Yes** to the opt-in text message is required to complete the opt-in process. Click the **OK** button to indicate you read this message.

The page at <https://www.volgistics.com> says:

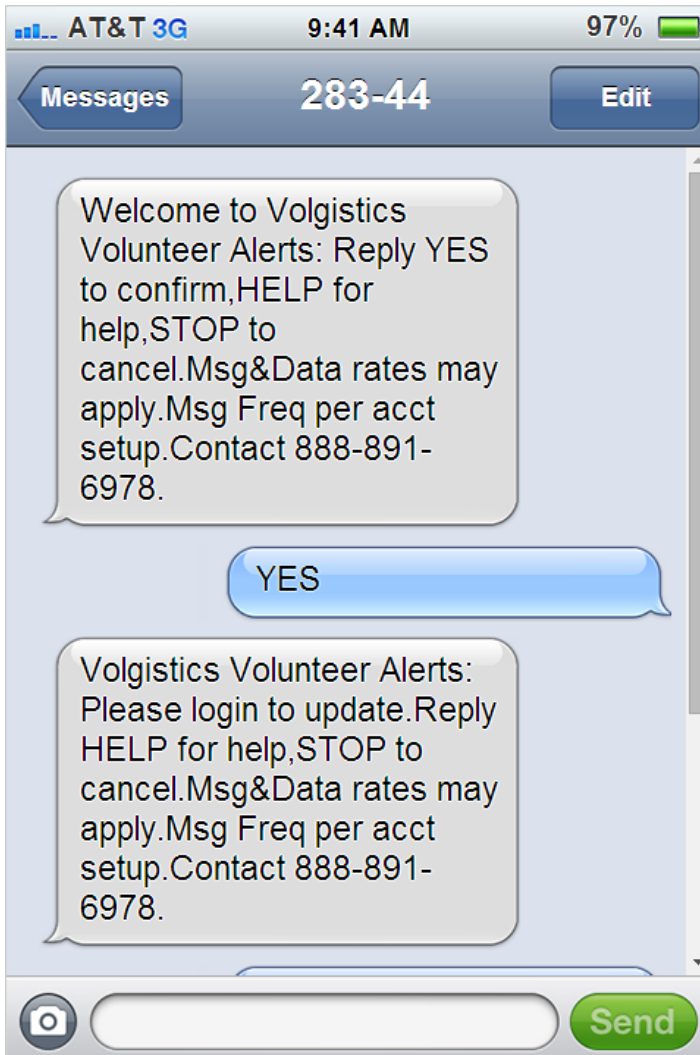


To complete the opt-in process,  
you must reply 'YES' in the message  
being sent to your phone.

OK

#### 10. Respond to the opt-in text message

You will receive a text message on your mobile phone shortly after you finish step 9. You must respond **YES** to this text message to finish the opt-in process.



## Opt-out Process & Changing Message Preferences

You are free to opt-out of the text messaging or change your message preferences at any time. Your organization does not have a way to change your messages preferences or the settings for the times you receive the automatic messages. You will need to follow the steps shown if you want to change these settings.

Follow these steps to opt-out of text messaging or change your message preferences through the VicNet module:

### **1. Sign-in to VicNet**

Most organizations place a link to VicNet somewhere on their web site. The login screen for the portal will look something like this:



Enter the email address the organization has on file for you along with your VicNet password. If you forgot your password, you can find assistance here.

If you are unable to sign-in, please contact the volunteer office at the organization where you serve.

### **2. Go to the Account tab**

Once you have signed-in, select the Account tab.



Some organizations may customize VicNet and/or the tabs so your account may look different and the tab may not be called *Account*. However, the tab you need will always be on the far right side.

### **3. Check the *Opt-out of text messages (SMS)?* checkbox or change your preferences**

If you wish to opt-out, check the box in front of *Opt-out of text messages (SMS)?*

**Volunteer information for Jennifer Tutone**

Home Mail My Profile My Schedule My Service History Time Sheet Account

**Message Preferences (Email / Text Messaging)**  
Use this section to change preferences or opt-out of text messaging (also known as "SMS").

**Opt-out of text messages (SMS)?** You are currently opted-in.

1. How do you prefer to receive these types of messages?

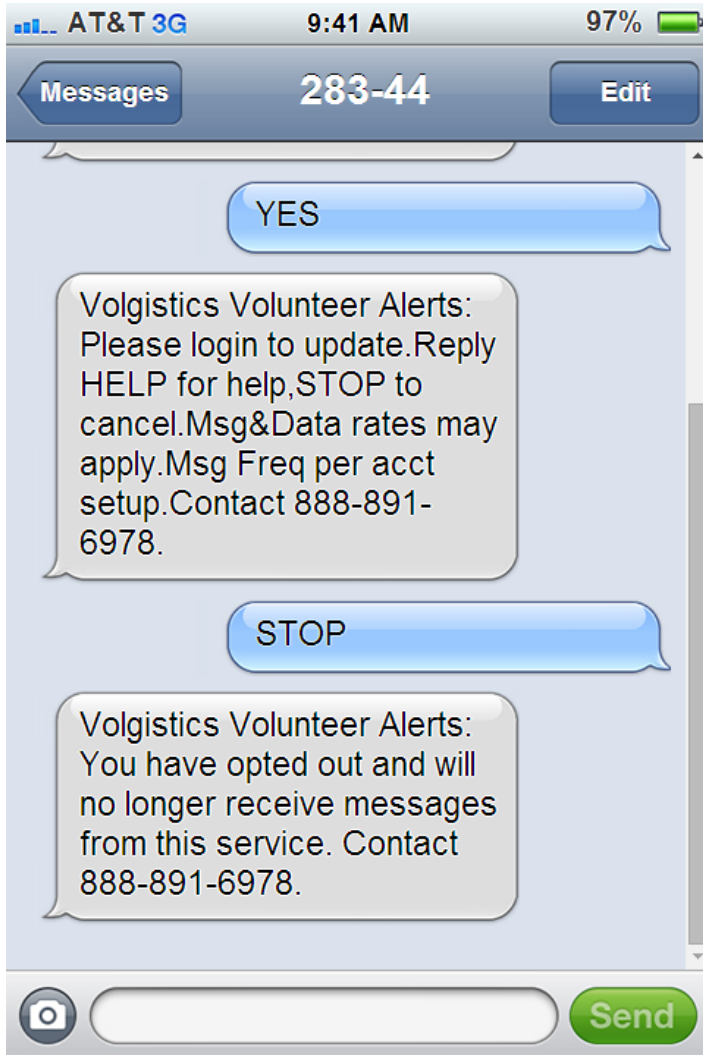
If you want to change your preferences for how you receive text messages instead of opting-out, adjust the settings for the types of message you prefer to receive and/or the times you wish to receive the automatic messages. Then proceed to step 4.

**4. Click the Save button**

Click the **Save** button at the bottom of the page to keep your settings.

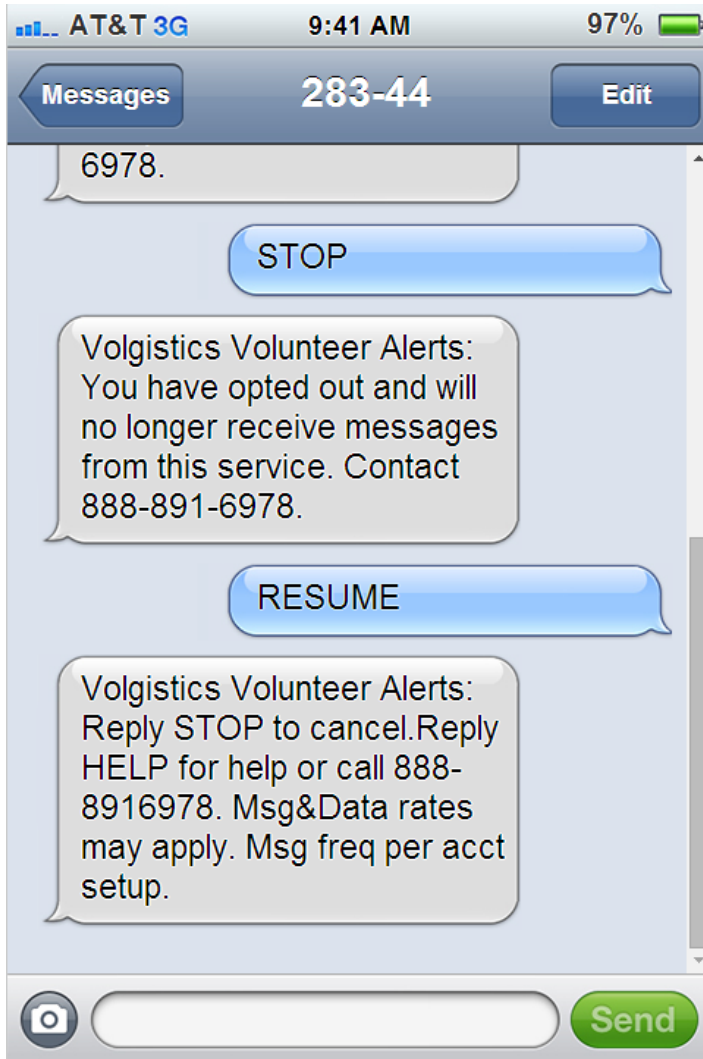
[Opt-out of text messaging without signing-in to VicNet](#)

You can also opt-out of texting without signing-in to VicNet. To do this, simply text **STOP** as a reply to a message you have received. In the United States, you can also text **STOP** to 28344.



### **Resume Opt-in**

If after opting-out you decide you want to opt back in, you can either follow the directions in the Opt-in Process section of this help topic, or simply text **RESUME** in response to a message you have received. In the United States, you can also text **RESUME** to 28344.



### **If Your Phone Number Changes**

Your organization does not have a way to update your phone number. If your mobile (cell) number changes, you will need to follow these steps if you need to change your number.

#### **1. Opt-out of text messaging at your old number**

Follow the steps shown in the Opt-out Process section of this help topic to opt-out of text messaging at your old number.

#### **2. Opt-in to text messaging at your new number**

Follow the steps shown in the Opt-in Process section of this help topic to opt-in to text messaging at your new number.

#### **Related Help**

Help Topic 1147 - How to Sign-in and Sign-out at VicTouch: A Brief Guide for Volunteers

Help Topic 1148 - How to use VicNet: A Brief Guide for Volunteers

Help Topic 1215 - How to use VicNet Mobile: A Brief Guide for Volunteers

## How System Operators Opt-in & Opt-out of Text Messaging

Help topic 1293

Added or revised 07-08-2014

*This help topic is designed to show System Operators how to opt-in and opt-out of text messaging so they can receive text messages. If you need information on how System Operators can send text messages, please see help topic 1295*

You can click on a section of the help topic in the *Content* box below to go directly to that section.

### Contents

- Opt-in Process
- Opt-out Process & Changing Message Preferences
- Resume Opt-in
- If Your Phone Number Changes
- Enable Application Alerts
- Receive Self-Scheduling Alerts

### Opt-in Process

Follow the steps below to start receiving text message alerts as a System Operator.

1. If you are not logged-in to your account, Login at [www.volgistics.com](http://www.volgistics.com). The first page you see will be the Welcome page. If you are already logged in, just select Welcome from the menu.
2. Click the link for the text message opt-in, opt-out and preferences.

The screenshot shows the Volgistics user interface. On the left is a vertical navigation menu with items: Volunteers, Assignments, Coordinators, Schedule, Tickler, Post, Tags, Sets, Print, Mailbox, Who's Here, Setup, Welcome (highlighted in orange), Help, and Exit. The main content area is titled 'Welcome Alexandra Call' and contains several sections: 'Account Statistics' (Volunteer records: 175, Archived volunteer records: 3, Cumulative hours of service: 15,641), 'Birthdays' (This week, Sara Johnston, Jun 20), 'Mail' (Your mailbox has: Pending applications: 7), 'Volgistics Webinar Scheduled' (January 30, 2014 at 4pm Eastern Time), and 'Tip of the Week January 20, 2014' (New Travel Time Merit Hours Feature). At the bottom of the page, a red arrow points to the link 'Text message (SMS) operator opt-in, opt-out, preferences'.

System Operators with access to Setup on the menu can also get to this page by selecting *Setup* from the menu, expanding the *Messages* link, and then selecting *Text message (SMS) operator opt-in, opt-out, preferences*.

3. Enter your mobile phone number and select your country.

Type your mobile (cell) phone number into the *Enter a mobile phone number* field. There is not a need to enter a "1" or a country code in front of the number.

### 1. Please Enter Your Mobile Device Number:

Volgistics Volunteer Alerts sends reminders, alerts, and custom messages from System Operators over SMS. Please tell us where we can send messages:

Enter a mobile phone number

123-456-7890

*This is a required field.*

Your country

United States ▼

*If outside U.S., this will help us determine which Country Code & format to use.*

**Supported Carriers:** AT&T, Sprint, Nextel, Boost, Verizon Wireless, U.S. Cellular®, T-Mobile®, Cellular One Dobson, Cincinnati Bell, Alltel, Virgin Mobile USA, Cellular South, Unicel, Centennial and Ntelos.

Use the *Your country* dropdown list to select the country your phone plan (or phone number) originates from.

The *Supported Carriers* list may not include the specific provider you use if you are outside of the United States. However, you should still be able to receive text messages.

4. Select the time range you'd like your text messages delivered between.

Use the dropdown lists to select the times you'd like to receive alerts between. The time settings will use the time zone recorded on the System Operator page for your record.

### 2. When would you like to receive *automated* messages?

Between these hours: 8:00 am ▼ and 6:00 pm ▼

The system will deliver the alerts as they occur as long as they happen between the hours selected. If alerts occur outside of the time range, the system will attempt to deliver the alerts as close to the beginning time as possible. However, conditions such as the number of messages being sent, the load at the wireless carrier, and the geographic region you're in may cause the messages to arrive later in the time period or not at all.

### 5. Agree to the Terms and Conditions set by Volgistics

Check the box to indicate you agree to the Terms and Conditions Volgistics requires to participate in text messaging.

3.  I agree to the Volgistics Terms and Conditions.

[Click to view the full Terms & Conditions and Privacy Policy.](#)



You can click the link to view the Terms and Conditions, or view them here.

**Please Note:** Depending on your mobile plan, you may be charged for text messages. By opting-in to text messaging you agree that any charges for text messages received as a participant are not the responsibility of Volgistics or the organization you serve with.

#### **6. Agree to any additional Terms and Conditions set by the organization you serve at**

The organization you serve with may have additional Terms and Conditions they require for texting. In this case, you must check the box to indicate you agree to the additional Terms and Conditions set by your organization.

#### **4. I agree to the Great Lakes Volunteers Terms and Conditions.**

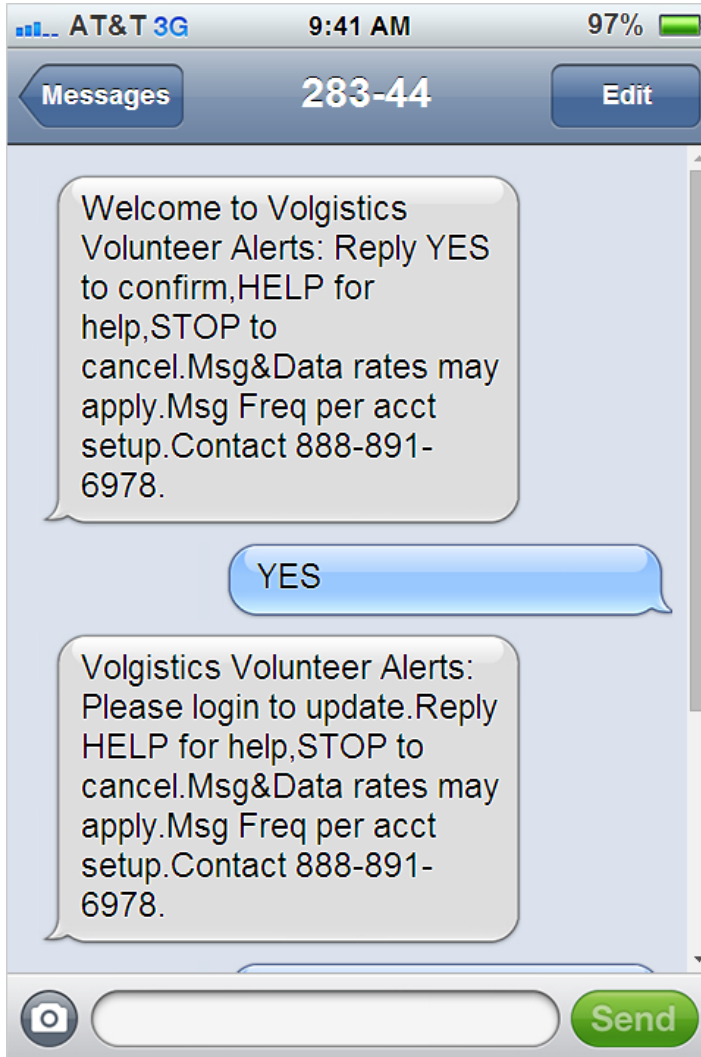
By participating in the texting program you agree not to receive or send texts while operating a vehicle. You also agree not to receive or send texts while working in locations in the facility designated as "No Texting" zones.

#### **7. Click the Submit button**

Click the **Submit** button at the bottom of the page to keep your settings.

#### **8. Respond to the opt-in text message**

You will receive a text message on your mobile phone shortly after you finish step 7. You must respond **YES** to this text message to finish the opt-in process.



### **Opt-out Process & Changing Message Preferences**

You are free to opt-out of the text messaging or change your message preferences at any time.

Follow these steps to opt-out of text messaging or change your message preferences through your account:

1. If you are not logged-in to your account, Login at [www.volgistics.com](http://www.volgistics.com). The first page you see will be the Welcome page. If you are already logged in, just select Welcome from the menu.
2. Click the link for the text message opt-in, opt-out and preferences.

**Welcome Alexandra Call**

**Account Statistics**  
 Volunteer records: 175  
 Archived volunteer records: 3  
 Cumulative hours of service: 15,641  
 (as of yesterday) [Help](#)

**Birthdays**  
 This week   
 Sara Johnston Jun 20 [Help](#)

**Mail**  
 Your mailbox has:  
 Pending applications: 7

**Volgistics Webinar Scheduled**  
 January 30, 2014 at 4pm Eastern Time  
 Join two member of the Volgistics support team as they discuss merit hours and the new travel time feature. Space is limited, so [register early!](#)

**Tip of the Week January 20, 2014**  
*New Travel Time Merit Hours Feature*  
 The Travel Time Merit Hours feature allows you to add volunteer service to recognize time spent traveling to volunteer. Please click [here](#) to read more.  
 You can find tips from previous weeks in our [blog](#).

[Change your Volgistics password](#)  
[Text message \(SMS\) operator opt-in, opt-out, preferences](#)

System Operators with access to Setup on the menu can also get to this page by selecting *Setup* from the menu, expanding the *Messages* link, and then selecting *Text message (SMS) operator opt-in, opt-out, preferences*.

3. To opt-out, check the box at the top of the page. Otherwise, change your time preferences.

**You are already opted-in**, would you like to opt-out (no longer receive text messages)?

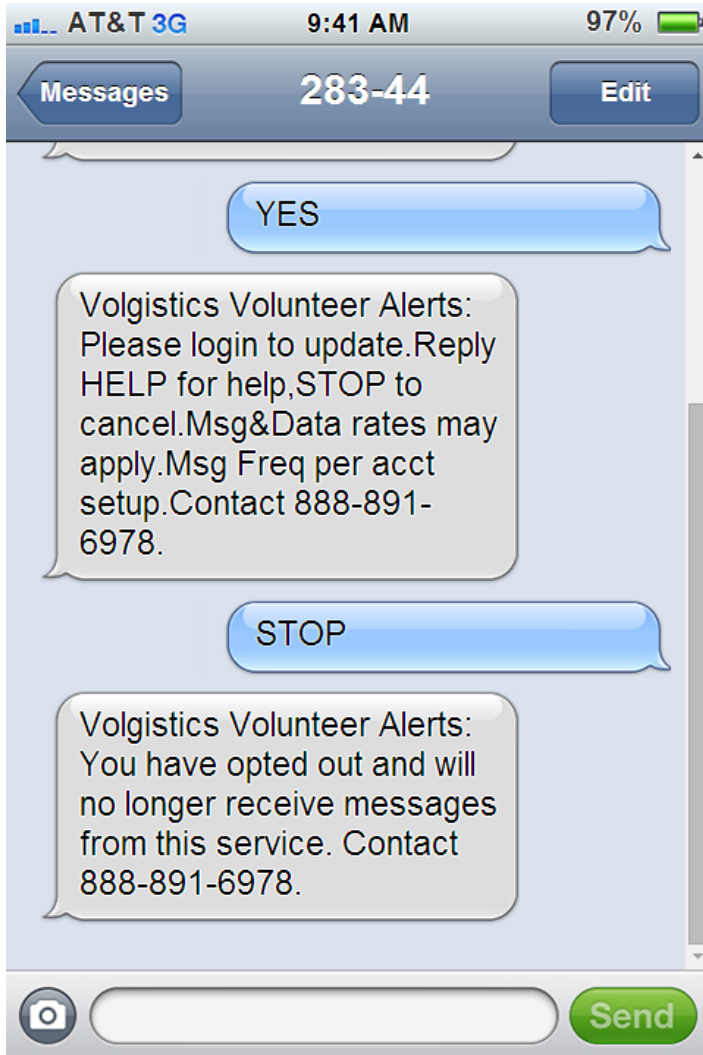
**1. Please Enter Your Mobile Device Number:**

Volgistics Volunteer Alerts sends reminders, alerts, and custom messages from

4. Click the **Submit** button at the bottom of the page.

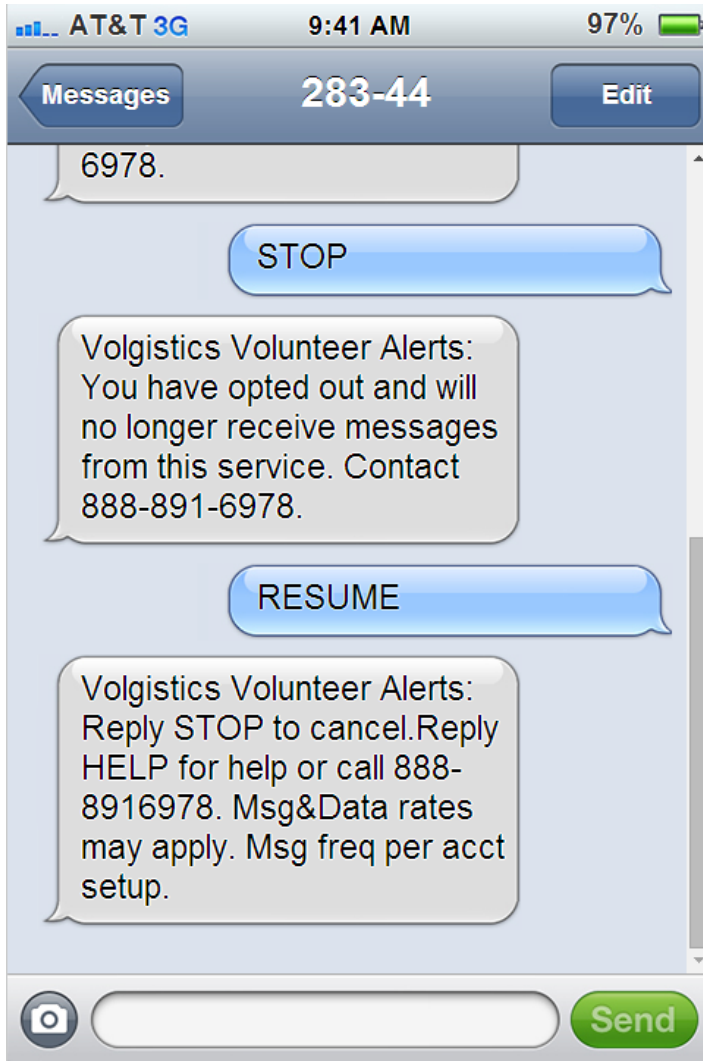
Opt-out of text messaging without signing-in to your account

You can also opt-out of texting without signing-in to your Volgistics account. To do this, simply text **STOP** as a reply to a message you have received. In the United States, you can also text **STOP** to 28344.



### **Resume Opt-in**

If after opting-out you decide you want to opt back in, you can either follow the directions in the Opt-in Process section of this help topic, or simply text **RESUME** in response to a message you have received. In the United States, you can also text **RESUME** to 28344.



### **If Your Phone Number Changes**

If your mobile (cell) number changes, you will need to follow these steps if you need to change your number.

1. Opt-out of text messaging at your old number

Follow the steps shown in the Opt-out Process section of this help topic to opt-out of text messaging at your old number.

2. Opt-in to text messaging at your new number

Follow the steps shown in the Opt-in Process section of this help topic to opt-in to text messaging at your new number.

### **Enable Application Alerts**

At this time, the only alerts that System Operators can receive by text are the alerts that an application has been submitted. If you'd like to enable these alerts:

1. Select Setup from the menu.
2. Expand the *Online forms* link.
3. Select *Volunteer application forms*.
4. Select the name of a form you'd like the alerts sent for.
5. Scroll down to the *Alerts* heading, make sure your name is selected from the dropdown list, and check the box by the option to send the alerts by text message. You can optionally receive the alerts on the In Box tab of the Volgistics mailbox or by email to the email address listed on your System Operator record.

**Alerts**  
Whenever an application form is submitted send an alert to:

Call, Alexandra

Send the alert...

To the Volgistics mailbox

By email

By text message

**Application auditing**  
By default, new applications do not go directly into your Volgistics database. Instead, they are initially staged

6. Click the **Save** button at the bottom or top of the page to keep your changes.

### **Receive Self-Scheduling Alerts**

While there is not a way to receive text messages as a System Operator other than the ones sent when an application form is submitted, you can receive text alerts when volunteers add or remove themselves from an assignment's schedule through VicNet or VicTouch. To do this, you will need to give yourself a Coordinator record as well as a System Operator record. Because your account's service fee is not based on the number of Coordinator records, you do not need to worry about this increasing your expenses.

Here is what you will need to do:

1. Setup a Coordinator record in the account for yourself. Help topic 1111 shows how to do this. Be sure to choose the assignments you want to receive the schedule alerts for on the *Assignments* tab of the record.
2. Set a temporary password for the record on the Vic tab as shown in the *Set temporary password* section of help topic 2234.
3. Sign-in to the VicNet portal for your organization with the temporary password and choose a permanent password for the record. You can find directions on how to do this here.
4. Opt-in to text messaging as shown in help topic 1291. Please note that if you do not want to receive other messages for the Coordinator record (such as Schedule Reminders or custom message types), you can opt-out of these when you are enabling text messaging for the Coordinator.

### **Related help**

Help Topic 1023 - Message Types

Help Topic 1025 - Coordinator Message Preferences

Help Topic 1068 - Volunteer Message Preferences

Help Topic 1290 - How to Enable Text Messaging for Your Account  
Help Topic 1291 - How Volunteers & Coordinators Opt-in & Opt-out of Text Messaging  
Help Topic 1292 - Text Message Validity  
Help Topic 1293 - How System Operators Opt-in & Opt-out of Text Messaging  
Help Topic 1294 - How to Disable Text Messaging for Your Account  
Help Topic 1295 - How to Send a Text Message  
Help Topic 1296 - Find Volunteers with Invalid Text Numbers  
Help Topic 1297 - Their Text Message Set Rule  
Help Topic 1298 - Their Text Message Validity Set Rule  
Help Topic 1299 - Using Email and Text Messages Together  
Help Topic 1300 - Text Messaging  
Help Topic 1301 - Text Messaging  
Help Topic 1991 - Mailbox Out Box Tab  
Help Topic 2100 - Introduction to Message Preferences  
Help Topic 2185 - How to Send Messages to the Volunteers in a Set  
Help Topic 2192 - How to Send Messages to the Volunteers Scheduled on a Certain Day  
Help Topic 2193 - How to Send Messages to all of a Coordinator's Volunteers  
Help Topic 2194 - How to Send Messages to all of the Tagged Volunteers

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## Text Messaging

Help topic 1300

Added or revised 09-23-2016

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*This help topic reviews the different types of text messages that can be sent from your account. It also contains some examples of what recipients will see when they receive a message.*

You can click a link in the *Contents* box to go directly to a section of the help topic.

### Contents

Custom Text Messages

Types of Automatic Text Messages

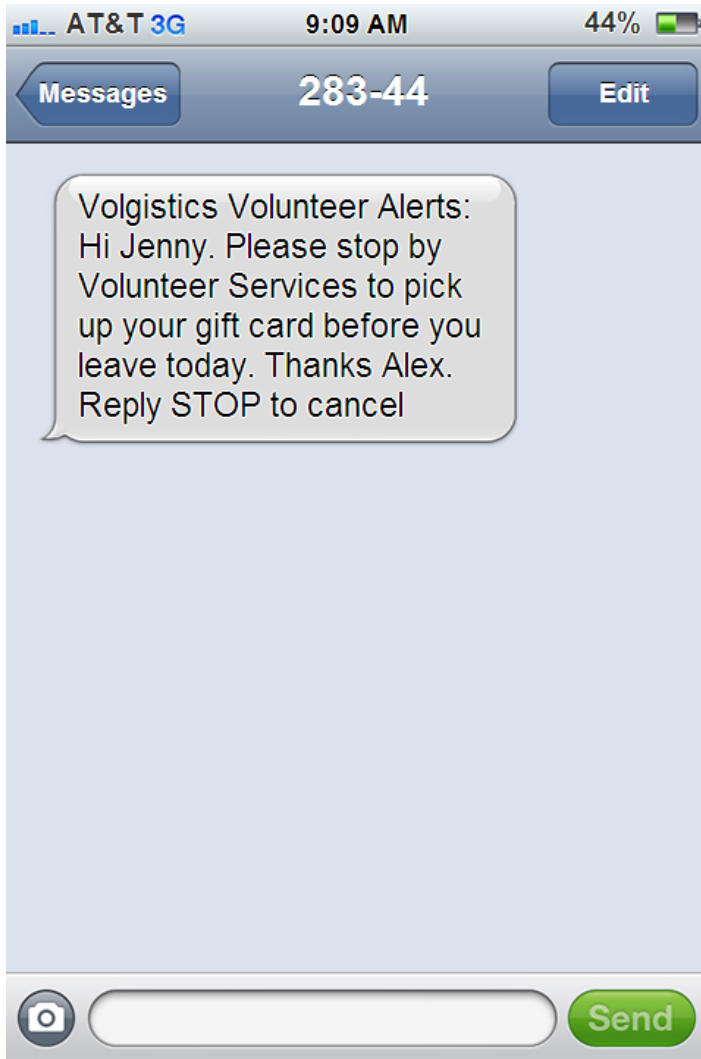
Content for Automatic Text Messages

Outgoing Messages Only

### Custom Text Messages

The texting feature provides a great new way to communicate with your volunteers. Younger volunteers may prefer to receive messages by text instead of email. You may also have times when you want to communicate with your volunteers while they are serving. For example, if you need to see a volunteer who is serving before he or she leaves. Help topic 1295 shows how to send a custom text message from your account.

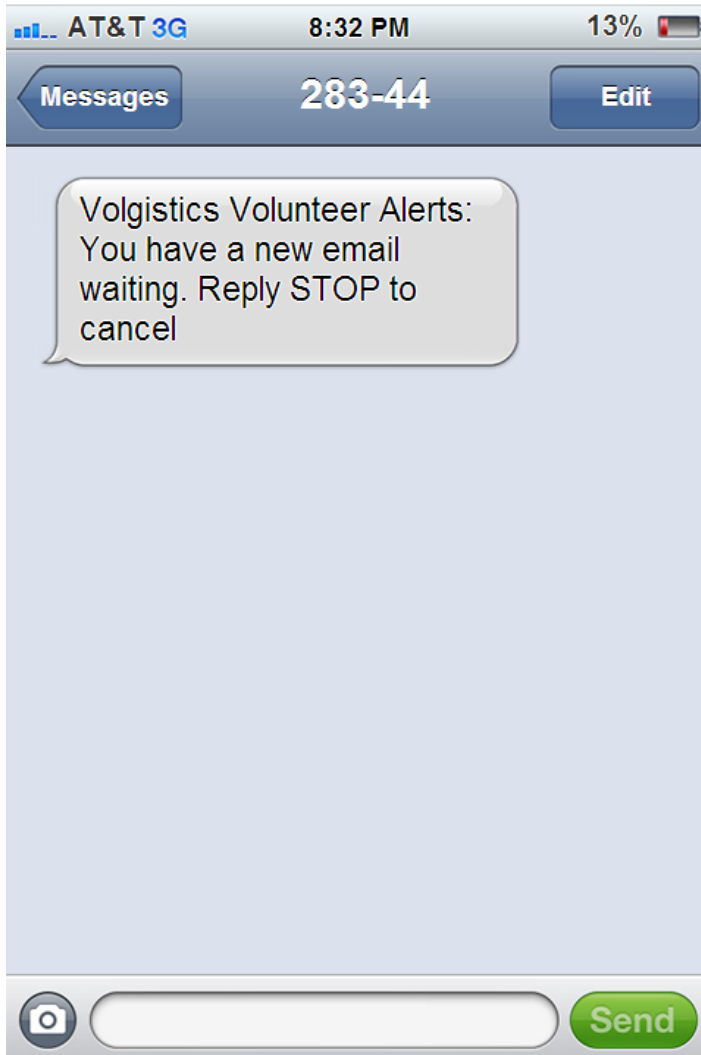
Here is an example of what a volunteer would receive if you sent a message asking her to stop by your office while she is working:



Cell phone service providers require us to include identification and certain instructions with each message sent. This extra text can take up to 50 of the 160 characters available for text messaging so only 110 characters are available for custom messages. Some carriers outside of the United States limit text messages to less than 160 characters. Recipients using these providers may not receive the entire message even if it is 110 characters or less.

If your text message field exceeds the maximum character length allowed, the message will be sent by email (when available) and the recipient will receive a text like the one below alerting them that an email has been sent. **Please note:** Because text messages are delivered much faster than email messages, the recipient may not see the email if they look for it right after receiving the text alert.





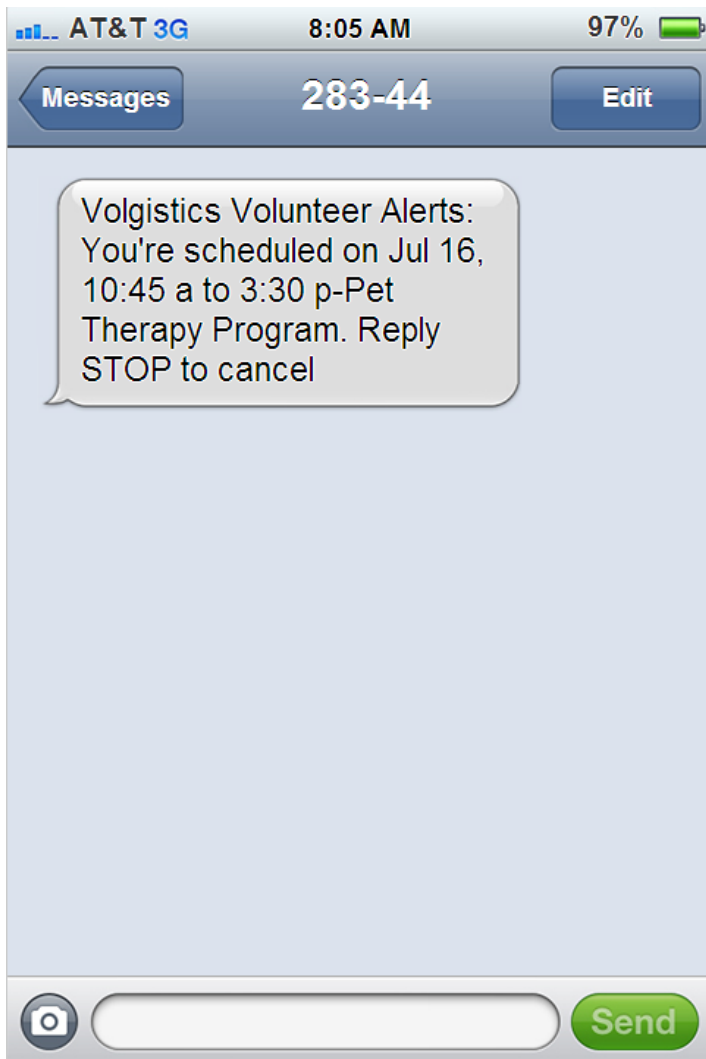
### **Types of Automatic Text Messages**

Your volunteers and Coordinators can also receive automatic messages. Depending on your account's settings, and who has opted-in, the following automatic text messages can be sent from your account:

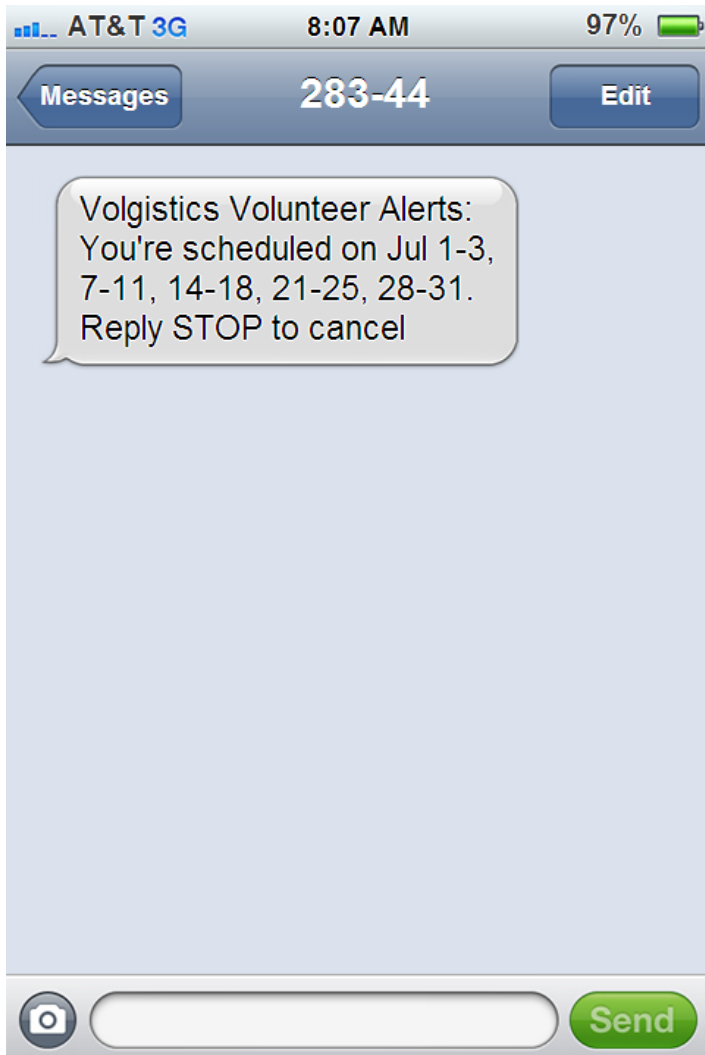
- Daily and/or monthly schedule reminder messages for volunteers.
- Daily and/or monthly schedule reminder messages for Coordinators.
- On-demand schedule reminders for volunteers.
- Schedule reminder messages to tagged volunteers sent from the Tags menu.
- Monthly volunteer schedules initiated by the volunteer from the Schedule page in VicTouch.
- Reminders to volunteers that a periodic or annual Checklist item will need to be renewed soon.
- Password messages to volunteers and Coordinators. These can be sent if the user clicks the Forget your password? link, a System Operator sends the password message from the Vic tab of the record, or a System Operator sends the password message by tagging the volunteer records.
- Self-scheduling alerts to Coordinators that a volunteer added or removed him or herself from the schedule.
- Application received alerts for System Operators that an online application form was submitted.

### **Content for Automatic Text Messages**

Text messages have a limited number of characters available, and cell phone service providers require us to include identification and certain instructions with each message sent so there are only 110 characters available for the message content. Because of this, the content of the automatic messages is determined by the system. There is not a way to customize the content for automatic messages. In most cases, the important information from the automatic message can be communicated without any problem using the limited number of characters. For example, in the daily schedule reminder shown below, the volunteer receives the date, times, and assignment he or she is serving in. Here is how this would look for a volunteer scheduled from 10:45 am to 3:30 pm on July 16 in an assignment called *Pet Therapy Program*:



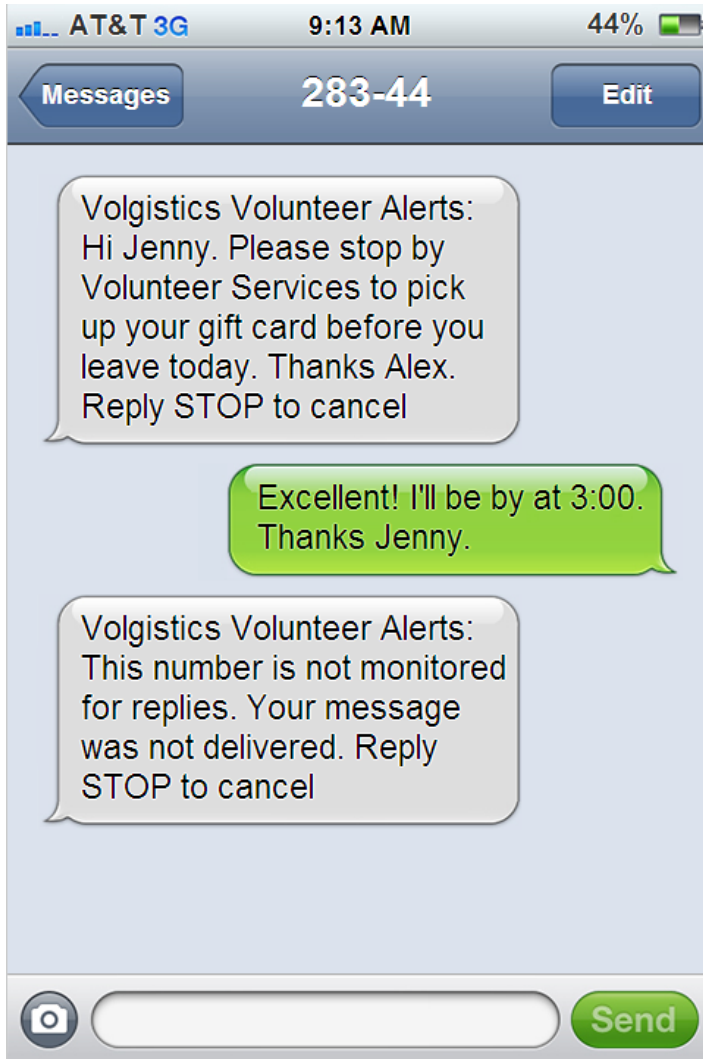
In other cases there is not a way to communicate all the information so if the recipient needs to know more, he or she will need to sign-in to see the additional information in VicNet. For example, the monthly schedule reminders do not have room to include the times and assignments the recipient is scheduled in because they contain a whole month's worth of information. Here is how the monthly schedule reminder message would appear for July 2014 for a volunteer scheduled on Monday through Friday:



### **Outgoing Messages Only**

Text messages sent from Volgistics are forwarded to an SMS gateway to be delivered to the recipient's phone. This process does not provide a way to link the response back to the Volgistics account that it originated from. Because of this, there is not a way for volunteers and Coordinators to respond directly to a text sent to them. So if you want the recipients to reply, you should arrange this beforehand, or include directions in your text.

If a volunteer or Coordinator does respond to a text you send, they will receive a message back that their message was not delivered. Here is how this would look if the volunteer who received the text message from the example in the Custom Text Messages section above sent a reply:



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## Getting Started with Text Messaging

Help topic 1301

Added or revised 12-01-2015

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*Volgistics is pleased to offer text messaging as a feature to help you communicate with your volunteers and Coordinators. This help topic is designed to help you get started with using the text message feature in your account.*

You can click on a link in the *Content* box below to be taken directly to a section of the help topic.

### Contents

1. Requirements & Background Information
2. Enable Text Messaging for Your Account
3. Communicate that Text Messaging is Available
4. Send Text Messages to Volunteers & Coordinators
5. Opt-in as a System Operator
6. How Text Messaging Changes Your Account

## **1. Requirements & Background Information**

Before you begin using the text message feature, please read the following information regarding account requirements and background information:

- VicNet Required. There is not a charge for the text messaging feature. However, it does require accounts to include the VicNet module in their service level. VicNet is necessary because it provides a way for volunteers and Coordinators to opt-in and out of text messaging, plus manage their text preferences. If VicNet is not currently part of your account's service level, you can add it by following the steps shown in help topic 2007.
- Outgoing Messages Only. Your text messages will originate from the Volgistics system before being forwarded to an SMS gateway. This process does not provide a way for incoming messages to be received back at the account the original message was sent from. This means there will not be a way for volunteers and Coordinators who receive your messages to respond directly to them. However, you can include your phone number in your text message so volunteers can use it to respond back with a text. If volunteers or Coordinators respond to a message (with something other than a keyword such as *HELP*, *YES*, or *RESUME*), they will receive a reply that their text was not delivered.
- Limited Message Length. Cell phone service providers require us to include identifying information and other instructions with each message sent. This extra text can take up to 50 of the 160 characters available for text messaging so only 110 characters are available for custom messages. Some carriers outside of the United States limit text messages to less than 160 characters. Recipients using these providers may not receive the entire message you sent.

## **2. Enable Text Messaging for Your Account**

To get started with text messaging, an Administrator for your account will need to enable text messaging. You can find directions on how to do this in help topic 1290.

## **3. Communicate that Text Messaging is Available**

You could introduce text messaging to volunteers and Coordinators at orientations and trainings. But to get started initially, most likely sending an email message from your Volgistics account is the easiest way to let everyone know that text messaging is available. To make this easier, Volgistics comes with a built-in way to send an email message.

After text messaging is enabled, the Messages Ground Rules page will have a section at the bottom where a default message appears. The default message reads:

Hello,

We are now able to send text messages! This will allow us to communicate with you faster, while offering you a more convenient way to receive messages. This option will allow us to send custom messages to keep you up-to-date, and you can also receive automated messages such as schedule reminders by text.

Text messages you receive from us will appear as "Volgistics Volunteer Alerts." You will not be able to respond to the text messages so if you need to reply please contact the volunteer office by email or phone.

To begin receiving text messages, you will need to opt-in with your mobile phone number. Your normal text and data rates will apply so please take this into consideration. Please click the following link to learn how to opt-in to text messaging. If the URL does not appear as a clickable link, please copy and paste the address into your web browser.

<https://www.volgistics.com/ex/Help.dll?ACT=21&HID+&TOPIC=1291>

Thank you for opting-in to text messaging. We appreciate your service and look forward to communicating with you more efficiently.

Thank you,

Volunteer Services

To edit this message, or send the message to all Coordinators, select Setup from the menu, expand the Messages link, and then select *Ground rules*. Scroll down to the *Text Message Opt-in Email* section.

If you edit the message's content or subject line, be sure to click the **Save** button before you send the message. To send the message to all of your Coordinators, click the **Send to all coordinators** button at the bottom of the page. If the Coordinator has already opted-in to text messaging, the email will not be sent to them.

In order to send the message to volunteers, you need to tag the records that you want to receive the email. Then select *Tags* from the menu and press the **Go** button beside the option to send the opt-in message. Volunteers who have already opted-in to text messaging will not receive the email even if they are in the group of records you tagged. You can learn more about sending the email to tagged records in the Send the text messaging opt-in email to the tagged records section of help topic 2137.

#### **4. Send Text Messages to Volunteers & Coordinators**

After your account has text messaging enabled, and volunteers and Coordinators have opted-in, you can begin sending text messages. It is not necessary for a System Operator to opt-in to text messaging to send messages to volunteers and Coordinators. Any operator who has operator rights to send messages can send text messages.

Sending a custom text message to your volunteers and Coordinators is very similar to sending an email message. To start the process, select *Mailbox* from the menu, click on the Out Box tab, and click the **Send a message** button to start your message. You can find in-depth directions on sending text messages in help topic 1295. You may also find help topic 1299 useful because it shows hints on how to send email and text messages based on the volunteer's preferences. Automatic messages from the system will be sent by text to volunteers and Coordinators as long as they opt-in to text messaging and select to have that type of message sent by text. You do not need to do anything else to enable this as long as the automatic messages are already setup in your account. The content and wording of the automatic text messages is standardized to make sure the message meets the character requirements for text messages. You can find a list of the different kinds of automatic text messages that can be sent in the *Types of Automatic Text Messages* section of help topic 1300.

#### **5. Opt-in as a System Operator**

Currently the only text messages System Operators can receive if they opt-in to texting are alerts that an online application form has been submitted. If you would like to receive these alerts by text message, you will need to opt-in as shown in help topic 1293.

If you are a System Operator and you'd like to receive alerts when volunteers add or remove themselves from the schedule, you can do this by setting up a Coordinator record in the account in addition to your System Operator record. Your account's service fee is not based on the number of Coordinator records so you do not need to worry about this increasing your expenses. You can find directions on how to do this in the *Receive Self-Scheduling Alerts* section of help topic 1293. There is not a need to opt-in as a System Operator if you only want to receive the self-scheduling alerts.

## 6. How Text Messaging Changes Your Account

Once you have text messaging setup in your account, you will see some changes. The first thing you may notice is that there are new fields on the Core tab of volunteer records and on the Coordinator tab of Coordinator records:

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

Save Cancel Archive Delete Combine New Previous Next

Tagged Copy

**Name**

Last name:  Number:  ⓘ

First name:  Status:  ⓘ

Middle name:  Title:  Type:  ⓘ

Nickname:  Kind:  Individual  Group ⓘ

**Address**

Street 1:  Home:   Ok to call

Street 2:  Work:   Ok to call

Street 3:  Cell:   Ok to call

City:  Text:   ⓘ

State:  Zip:  Fax:   Ok to call

Messaging:  No postal mail  No email  
 No text message Pager:   Ok to call

Email:   Other:   Ok to call

Web Site:  Visit

After you enable text messaging, a *Text* field will appear where the other phone numbers show on volunteer records. This field is "read only" because regulations do not allow you to change a volunteer's or Coordinator's number as it affects their opt-in rights. If a volunteer or Coordinator needs to change the number they use for texting, they will need to opt-out of texting at the old number and then opt-in with the new number. The *If Your Phone Number Changes* section of help topic 1291 shows how to do this.

To the right of the *Text* field you will find a *Text Validity* field. This field is helpful to determine if the volunteer's text number is receiving messages because the field's color will change based on the number's validity. Help topic 1292 has more information on this.

There is also a *No text message* checkbox that can be used to block a volunteer or Coordinator from receiving text messages without requiring them to opt-out of texting. One use for this would be a situation where a volunteer is asked to leave your organization so you do not want him or her to receive texts, but you still need to keep his or her record for reports.

You will also see a new column in the Messages box on the History tab of the volunteer records. This column will show which text messages the volunteer has received and whether or not they were successfully received. Help topic 2064 explains more about how this works.

**Messages**

Recent Archived

Sent	Subject	Sent to			
07-14-2014	Marincy, Arizona	(555) 867-5309			
07-14-2014	Happy Birthday, Anyway	(555) 867-5309			
06-09-2014	.lennv .lennv	tommv.tutone.2@mailinator.com			

You may also want to add the *Text* and *Text message validity icon* fields to the Volunteers page so you can see who has opted in. Remember that you can sort the Volunteers page by any of the column headings (except *Tag*) by clicking on the column's title. This makes it easy if you want to Tag volunteer records to send them a text message. You can just sort the page by the *Text* column and then tag the records. You can find information on how to change which fields appear on the Volunteers page in help topic 1202.

## 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

1 Volunteer listed

	Name	Tag	Number	Text	
	<a href="#">Tutone, Jennifer</a>	<input checked="" type="checkbox"/>	1981	(555) 867-5309	

1 Volunteer listed

↑

Tag these Un-tag these

There are also two new Set rules to help you find volunteers who have opted-in, or volunteers based on their text number validity. Help topic 1297 explains more about the Set rule for finding volunteers who have, or do not have, a text number. Help topic 1298 explains more about the rule for finding volunteers who have, or do not have, a valid text number. Help topic 1296 shows how to use this Set rule to find volunteers with an invalid text number.

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## Forget your password? (Volunteers and Coordinators)

Help topic 1307

Added or revised 03-23-2017

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*This help topic is designed to show volunteers and Coordinators how to reset the password they need to login to VicNet.*

### 1. Click the *Forget your password?* link

If you have forgotten the password you use to login to your organization's VicNet portal, start by clicking the *Forget your password?* link on the login page. This will look something like the image below depending on how your organization has setup the account:



**Your Logo Here**

**Login**

Enter your email address and your volunteer information center password, and then click the Go button.

Login name:

Password:

[Forget your password?](#) [Help](#)  
[Need a password?](#)

**Go**

**Secure Login**

Account number:

Email address:

Password:

Remember my credentials at this computer

Login

## 2. Enter your email address and click the Go button

Enter the email address you use to login to the VicNet portal in the *Email address* field and click the **Go** button. The email address entered must match the email address on your volunteer or Coordinator record in order for the password to be sent. The system will send a link you can use to set a new password to your email address. **Please note:** The link will only remain active for 24 hours after it is sent. If you click the link and it says it expired, simply go back and click the *Forget your password?* link again.

**Your Logo Here**

**Login**

Forget your password?

Enter your email address and then click the **Go** button. We will send a **reset link** to you by email.

Email address:

**Go** **Cancel**

If you continue to experience difficulty accessing your information, please contact the volunteer office for further assistance.

If you have more than one record in the system that uses the same email address (for example if you have a volunteer and Coordinator record, or family members share an email address), you will see a screen similar to the one shown below. In this case, check the box next to the record (or records) you want to reset the password for and then click the **Go** button.

**Your Logo Here**

**Login**

Select Record(s)

There is more than one volunteer or coordinator record with the given email address (EmilyTate@mailinator.com). Please select from the list and click the **Go** button to **reset** the password(s) you would like. We will send you a password reset link via email.

Emily Tate (coordinator)

Emily Tate (volunteer)

**Go** **Cancel**

If you receive a message that the email address you entered does not have an account, it means the system could not find any records with access to Volgistics. The three most common reasons for this are: 1) A typo in the address you entered, or the address on file for your record, 2) There is no record in the system for the address entered, or 3) There is a record, but the access is not approved. Double check that you typed the address correctly. If the address was entered correctly, you will need to contact the volunteer office at the organization you serve with for further assistance.

### 3. Sign-in to your email account to set your password

Go to the email account that the password was sent to, sign-in, and check for new messages. You should receive the temporary password message within a few minutes. However, some email systems and ISPs may delay the delivery of email messages.

If you do not see the message in a few minutes and your email program uses a spam filter, check the junk mail or spam folder for the message.

When you receive the message, click the link in the message to set your password. If for some reason you cannot click the link, highlight the URL address beginning with *https://...* Once the complete address is highlighted, copy it and then paste it into a new web browser window.

You will see a screen that looks similar to the one below:

Enter a new password into both the *New Password* and the *Confirm Password* fields, and then click the **Go** button. The new password you enter must be different than your previous password, *and* it must meet any password strength rules set by your organization.

Remember the new password you enter because this is what you will use to login to Volgistics the next time you access your account.

## Mailbox Out Box Tab

Help topic 1991

Added or revised 04-28-2014

The Mailbox's Out Box tab provides a way to send messages to your volunteers and Coordinators. It is also used to view and manage your history of sent messages. If you are not already on the Out Box tab, you can get there by selecting Mailbox from the menu, and then clicking the Out Box tab.

The Out Box tab is divided into three sub-tabs for organizing your messages. These are the Recent, Archived and Deleted sub-tabs.

Sent	Subject	From	To	Count
<input type="checkbox"/> Saved to send later	<a href="#">Updated Parking Pass Needed</a>	Brenda Samuelson	All Active volunteers	0
<input type="checkbox"/> 09-27-2013 11:45	<a href="#">Orientation Scheduled</a>	Brenda	All tagged	17

This help topic covers how the Out Box tab works in your Volgistics account.

## Contents

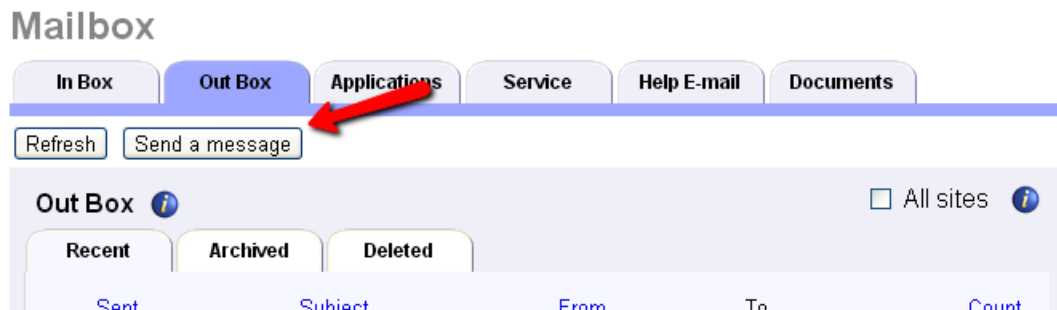
Refreshing the Out Box Tab  
Sending Messages from the Out Box Tab  
Site Level Access and the Out Box Tab  
Sorting the Out Box Tab  
Recent Sub-Tab  
Archived Sub-Tab  
Deleted Sub-Tab  
Viewing Stored Messages  
Recipient List on Stored Messages

## Refreshing the Out Box Tab

The Out Box tab will show an up-to-date view each time you select Mailbox on the Volgistics menu and then return to the Out Box tab. If you're on the Out Box tab and you want to update the view without leaving the tab, click the **Refresh** button in the top left corner of the Out Box tab.

## Sending Messages from the Out Box Tab

You can send Vic Mail, email messages and text messages to your volunteers and Coordinators from the Out Box tab. To start a message, click the **Send a message** button at the top of the tab.



Refer to the following help topics for details on sending each type of message:

- Email Messages- Help topic 2195
- Text Messages - Help topic 1295
- Vic Mail Messages - Help topic 1127

## Site Level Access and the Out Box Tab

If your organization uses Site Level Access and a System Operator is logged in as a Headquarters-level operator, the Out Box tab will have a checkbox for *All Sites* in the upper right corner. If this box is checked, the operator will view messages generated by Headquarters as well as messages generated by Site-level Operators. If the *All Sites* box is un-checked, only messages generated by Headquarters will be displayed on a Headquarters-level operator's Out Box tab.

Users logged in as Site-level Operators will not see the *All Sites* checkbox on the Out Box tab. With Site Level Access, the Out Box tab will only display messages generated at their Site.

## Sorting the Out Box Tab

By default, all of the sub-tabs are sorted by the Sent column with the most recent items at the top. In the case of the Recent and Deleted sub-tabs, *Saved to send later* messages appear above sent messages. As your Out Box tab grows to contain more messages, it may become difficult to find an item you're looking for. To help you with this, Volgistics allows you to sort the sub-tabs by the Sent, Subject, From and Count columns. Just click on the column heading to sort the messages on the sub-tab based on that column's information.



The screenshot shows the 'Out Box' interface with three sub-tabs: 'Recent', 'Archived', and 'Deleted'. The 'Recent' sub-tab is active. Below the sub-tabs, there are four column headers: 'Sent', 'Subject', 'From', and 'Count'. Red arrows point to each of these headers. The 'To' column is also visible. Below the headers, there are two rows of messages. The first row has a checkbox, 'Saved to send later', 'Additional Volunteers Needed', 'Brenda Samuelson', and '0'. The second row has a checkbox, '10-09-2013 3:22 p', 'Construction Entrance', 'Brenda', 'All Active', and '15'.

	Sent	Subject	From	To	Count
<input type="checkbox"/>	Saved to send later	<a href="#">Additional Volunteers Needed</a>	Brenda Samuelson		0
<input type="checkbox"/>	10-09-2013 3:22 p	<a href="#">Construction Entrance</a>	Brenda	All Active	15

## Recent Sub-Tab

The Recent sub-tab shows messages that were *Saved to send later* when they were created, along with sent messages that are less than 180 days old. If a sent message remains on the Recent sub-tab after 180 days, it is automatically sent to the Archived sub-tab. *Saved to send later* messages cannot be moved to the Archived sub-tab.

If a volunteer was the recipient of a message that was sent, the subject and date of the message on the Recent sub-tab will also appear in the message history kept on the Recent sub-tab in the Messages section of the volunteer's History tab. You can find more information on this in help topic 2064.

Sent messages can be moved from the Recent sub-tab to the Archived sub-tab by checking the box next to the message and then clicking the **Archive** button. You can check all of the boxes by messages at once by clicking the **Check all** button. Clicking the **Un-check all** button reverses this action. If *Saved to send later* messages are included when you click the **Archive** button, you will get a message that these messages cannot be moved to the Archived sub-tab.

Sent messages and *Saved to send later* messages can be moved from the Recent sub-tab to the Deleted sub-tab by checking the box next to the message and then clicking the **Delete** button. You can check all of the boxes by messages at once by clicking the **Check all** button. Clicking the **Un-check all** button reverses this action.

Please see the Viewing Stored Messages section of this help topic for information on viewing a stored message.

## Archived Sub-Tab

The Archived sub-tab shows messages that have been manually archived as well as sent messages that were automatically moved to the Archived sub-tab from the Recent sub-tab after 180 days have passed. Messages in this section will remain indefinitely unless they are deleted. There is not a way to send a message from the Archived sub-tab back to the Recent sub-tab because there are not any actions that can be taken on the Recent sub-tab that cannot also be taken from the Archived sub-tab.

If a volunteer was the recipient of a message stored on the Archived sub-tab, the subject and date of the message will appear on the Archived sub-tab in the Messages section of the volunteer's History tab. You can find more information on this in help topic 2064.

The messages on the Archived sub-tab can be moved from the Archived sub-tab to the Deleted sub-tab by checking the box next to the message and then clicking the **Delete** button. You can check all of the boxes by messages at once by clicking the **Check all** button. Clicking the **Un-check all** button reverses this action.

Please see the Viewing Stored Messages section of this help topic for information on viewing a stored message.

### **Deleted Sub-Tab**

The Deleted sub-tab shows messages that have been deleted from the Recent or Archived sub-tabs. Messages sent to this tab remain for seven (7) days after they are deleted to allow you to recover them if they were accidentally deleted. If they are not recovered within seven days, they are permanently deleted from the system.

If a volunteer was the recipient of a message that appears on the Deleted sub-tab, the subject and date of the message will continue to appear in the message history in the Messages section of the volunteer's History tab until it is permanently deleted from the system. Once the message is permanently deleted, the subject and date will be removed from the volunteer's message history. If you complete the action to permanently delete the message yourself, you may see the subject and date for a brief time still on the volunteer's record. This is because the process to remove the date and time from the volunteer's record is performed during the overnight maintenance cycle. You can find more information on this in help topic 2064.

The messages on the Deleted sub-tab can be restored to the tab they were received from by checking the box next to the message and then clicking the **Restore** button. You can check all of the boxes by messages at once by clicking the **Check all** button. Clicking the **Un-check all** button reverses this action.

The messages on the Deleted sub-tab can be permanently deleted before the seven (7) day waiting period by checking the box next to the message and then clicking the **Delete** button. You can check all of the boxes by messages at once by clicking the **Check all** button. Clicking the **Un-check all** button reverses this action. Once a record is permanently deleted, there is not a way to recover it.

Please see the Viewing Stored Messages section of this help topic for information on viewing a stored message.

### **Viewing Stored Messages**

To see details about any message on a sub-tab, just click on the subject of the message. When you do this you can view information such as how the message was sent, the volunteers it was sent to and the content of the message. The message's content box will vary in appearance depending on the web browser you use. For example, some browsers do not allow you to scroll to see all of the information in the content box. With most browsers you can highlight and copy the message's content even if it appears to be grayed out.

The controls available on the message differ depending on which sub-tab you're on. The Recent sub-tab has **Archive** and **Delete** buttons, the Archived sub-tab only has a **Delete** button, and the Deleted sub-tab has **Restore** and **Delete** buttons on sent messages. *Saved to send later* messages on the Delete sub-tab will have the same options available as they do on the Recent sub-tab. If you send a *Saved to send later* from the Deleted sub-tab, it will automatically be moved to the Recent sub-tab.

### **Recipient List on Stored Messages**

When you view a sent messages as shown in the Viewing Stored Messages section of this help topic, you will see a list of volunteers and Coordinators who the message was sent to. On the Archived sub-tab, this list is collapsed initially so you need to click the **Show recipients** button to see this list. When a message was sent to both volunteers and Coordinators, the volunteer names will appear first and then the Coordinator names will be listed at the end.

In order to be on the recipient list, the volunteer's record needs to be in the non-archived section of your database. Records that have been deleted, or archived, will no longer appear on the recipient list.

---

## Finding Volunteer Records

Help topic 2023

Added or revised 04-17-2017

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Once you've started adding new volunteer records to your database, you'll eventually want to go back and open individual volunteer records to look-up information or add more data. This help topic explains how to find and open records.

Click on a link in the Content window below to be taken directly to that section of the Help topic.

### **Content**

- Controlling Records Shown
- Using the Alphabetical Index
- Viewing All Volunteers
- Using Include Options
- Find by Last Name
- Find by First Name
- Find by Number
- Find by Email Address
- Find by Group Name
- Using Wildcard Search Features
- Sort & Search Records

**Controlling Records Shown**

When you use one of the methods shown in this help topic to bring up your volunteer records, the Volunteers page may not load all of your records initially if you have a large number of records. If the search results contain more records than the dropdown is set to, the entry count will indicate that not all of the records are shown.

volgistics  
Volunteer Logistics

Volunteers

Assignments  
Coordinators  
Schedule  
Tickler  
Post  
Tags  
Sets  
Print  
Mailbox  
Who's Here

**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

Tag Un-tag i

Show 5000 entries

Showing 1 to 5,000 of 18,160 entries

Name	Tag	Group name	Street	Search
Anderson, Lionel	<input type="checkbox"/>	Puritan Food Stores, Inc.	810 Bostwick Blvd.	Hamil
Armstrong, Marv F	<input type="checkbox"/>		4985 Malow Court	Casc

In this case, you can advance to the next page of records by using the controls at the top or bottom of the right hand side. Select a page number in the sequence, or click the *Next* link.

Search:

Previous 1 2 Next

Number	Status	Type	Kind	Home	Work
Search	<input type="text"/>	Search	Search	Search	Search

If you need to see and work with all records at once, select *All* from the dropdown on the top left side of the page.

volgistics  
Volunteer Logistics

Volunteers

Assignments  
Coordinators  
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Tickler  
Post  
Tags  
Sets  
Print  
Mailbox  
Who's Here

**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

Tag Un-tag i

Show All entries

Show 1000 2500 5000

Showing 1 to 5,000 of 18,160 entries

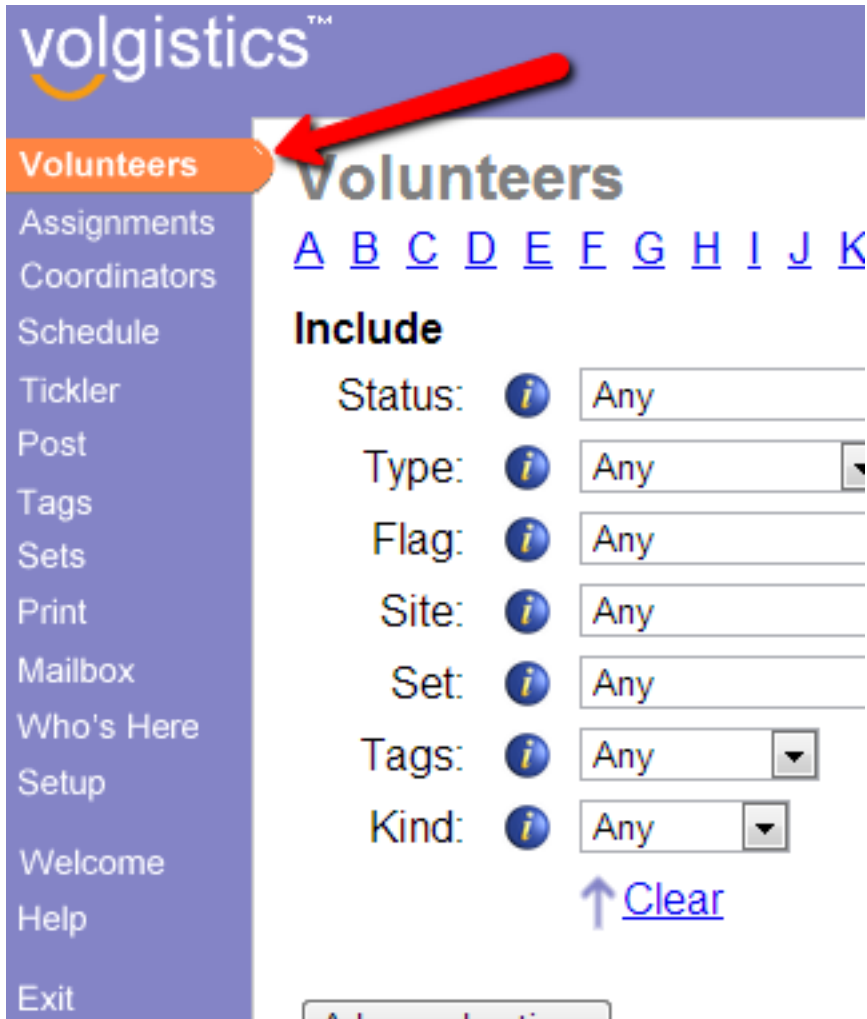
Name	Tag	Group name	Street	Search
Anderson, Lionel	<input type="checkbox"/>	Puritan Food Stores, Inc.	810 Bostwick Blvd.	Hamil
Armstrong, Marv F	<input type="checkbox"/>		4985 Malow Court	Casc

### Using the Alphabetical Index

One way to locate a volunteer record is to use the alphabetical name index located at the very top of the Volunteers screen.

1. Choose Volunteers from the menu.





2. Across the top of the Volunteers screen you'll see the letters of the alphabet. Click on the first letter of the volunteer's last name. For example, if you're looking for *George Bailey*, click the "B" link to see the volunteers whose last names begin with the letter B.

3. Volgistics displays an alphabetized list of the volunteers whose last names start with the letter you selected. If necessary, scroll down this list until you find the volunteer you're looking for. When you see the volunteer you're looking for, click on his or her name to open the record.

### Viewing All Volunteers

To view a list of all volunteer records:

1. Choose Volunteers from the menu.
2. Click the "All" link next to the letter "Z" in the alphabetical index.

### 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](#)

You'll see a list of all volunteers.

### Using Include Options

You might want to limit your search to just certain volunteers, such those with an Active Status or just a certain Flag or Type. You can use the fields under the *Include* heading to do this. Available fields include Status, Type, Flag, Site, Set, Tags and Kind. The fields you see on the Volunteer page may not include all of these options depending on your account's setup.

Here is how to use the *Include* options:

1. Choose Volunteers from the menu.
2. Locate the *Include* section.
3. Use the fields to limit your search to just records with the desired *Status, Type, Flag, Site, Set, Tags* and/or *Kind*. For example, to search for just records with the Active Status, select "Active" from the Status dropdown list and leave the other fields set to "Any."

### Include

Status:    

Type:   

Flag:   

Site:   

Set:   

Tags:   


Kind:   

 [Clear](#)

4. Click on a letter of the alphabet or the All link to see records that have the selection you made in the *Include* field.

You can also use more than one *Include* field at a time for more advanced searches. For example, if you wanted to find only volunteers with the Active Status who also have the "Approved Driver" Flag on their record, select "Active" from the Status dropdown and "Approved Driver" from the Flag dropdown and then complete your search.

## Include

Status:  Active  

Type:  Any 

Flag:  Approved Driver  

Site:  Any 

Set:  Any 

Tags:  Any 

Kind:  Any 

 [Clear](#)

Selections in the *Include* fields will stay in place during your session unless they are changed. You can either reset the field's dropdown to "Any," or click the "Clear" link underneath the fields to reset them. The fields will reset to "Any" automatically when your session ends.

You can also fine tune your searches even more by clicking the **Advanced options** button that appears under the fields. This page allows you to do things such as selecting multiple options for a field, or excluding certain options for a field. For example, to find all records with the Active and Applicant Statuses you would set the Status field as shown below and then click the "All" link.

---

### Status

- Any  
 Only these  
 Not these
- |  |   |                                   |
|--|---|-----------------------------------|
| <input checked="" type="checkbox"/> Active | <input checked="" type="checkbox"/> Applicant | <input type="checkbox"/> Inactive |
| <input type="checkbox"/> Leave of Absence  | <input type="checkbox"/> Prospect             |                                   |
- 

Or if you wanted to find all records with either the "CPR Certified" or the "Certified Life Guard" Flags, you'd set the Flag field as shown below and then click the "All" link.

---

### Flag

- Any  
 Any of these  
 All of these  
 None of these
- |   |   |  |
|---|---|--|
| <input type="checkbox"/> Approved Driver          | <input type="checkbox"/> Auxiliary              | <input checked="" type="checkbox"/> Certified Life Guard |
| <input checked="" type="checkbox"/> CPR Certified | <input type="checkbox"/> Emergency Availability | <input type="checkbox"/> RSVP                            |
| <input type="checkbox"/> ServSafe Certified       |   |  |
-

The "Any of these" setting functions like an *or*. It would bring up volunteers if they have either of the Flags. The "All of these" setting functions like an *and*. Volunteers would need both Flags on their records in order to be included in the results if this were selected.

Click the **Basic options** button to return to first page when you're done using the advanced search features.

Selections you make on the *Advanced options* page will not remain selected when you leave the page.

### Find by Last Name

You can also find volunteer records by last name. To find the record for an individual volunteer by the volunteer's last name:

1. Choose Volunteers from the menu.
2. Enter the volunteer's last name in the *Last Name* field and then click the **Go** button located just to the right. If you're unsure of the spelling of the volunteer's name, see the Using Wildcard Search Features section of this help topic.

### Find

Find from within all volunteer records

Last Name:	<input type="text" value="Bailey"/>	<input type="button" value="Go"/>
First Name:	<input type="text"/>	<input type="button" value="Go"/>
Number:	<input type="text"/>	<input type="button" value="Go"/>
Email:	<input type="text"/>	<input type="button" value="Go"/>
Group Name:	<input type="text"/>	<input type="button" value="Go"/>

3. Volgistics displays an alphabetized list of volunteers whose last names match the name you entered. Locate the exact volunteer you're looking for and click on his or her name to open the record. If the record does not appear on the list, you might find Help topic 2291 useful.

### Find by First Name

There may be times when you remember a volunteer's first name, but not their last. You can look-up volunteer records using the volunteer's first name, too. To find the records for volunteers with a certain first name:

1. Choose Volunteers from the menu.
2. Enter the volunteer's first name in the *First Name* field and then click the **Go** button located just to the right. If you're unsure of the spelling of the volunteer's name, see the Using Wildcard Search Features section of this help topic.
3. Volgistics displays an alphabetized list of the volunteers whose first names match the name you entered. Locate the exact volunteer you're looking for, and then click on his or her name to open the record. If the record does not appear on the list, you might find Help topic 2291 useful.

### Find by Number

Some volunteer leaders use numbers to identify volunteers. If you assign numbers to your volunteers, you can locate a volunteer by their number by:

1. Choose Volunteers from the menu.
2. Enter the volunteer's number in the *Number* field and then click the **Go** button located just to the right. If you only know part of the volunteer's number, see the Using Wildcard Search Features section of this help topic.
3. If there is one, Volgistics displays the name of volunteer that has the number you entered. Click on the volunteer's name to open their record. If the record does not appear on the list, you might find Help topic 2291 useful.

### **Find by Email Address**

To find the record for a volunteer using their email address:

1. Choose Volunteers from the menu.
2. Enter the volunteer's email address in the *Email* field and then click the **Go** button located just to the right. If you only know part of the address, see the Using Wildcard Search Features section of this help topic.
3. Volgistics displays an alphabetized list of the volunteers whose email addresses match the email address you entered. Locate the volunteer you're looking for and then click on his or her name to open the record. If the record does not appear on the list, you might find Help topic 2291 useful.

Of course the volunteer's email address must have been recorded in their record in order for Volgistics to be able to locate the record by email address. You enter volunteer email addresses on the Core tab.

### **Find by Group Name**

You can also find a group record by searching for the name of the group by:

1. Choose Volunteers from the menu.
2. Enter the group's name in the *Group Name* field and then click the **Go** button located just to the right. If you only know part of the name, see the Using Wildcard Search Features section of this help topic.
3. Volgistics displays an alphabetized list of the records that match the name you entered. Locate the record you're looking for and then click on the link to open it. If the record does not appear on the list, you might find Help topic 2291 useful.

### **Using Wildcard Search Features**

If you only know part of the information for the record you're trying to locate, or are unsure of the spelling for a search field, you can also use wildcard searches in the fields under the *Find* heading. Here is the way these work:

- You can enter just the first part of the information in the field. For example, if you're looking for a volunteer named "George Bailey" you can enter "Ba" in the *Last Name* field. This will bring up all records where the last name starts with "Ba" such as Bailey, Baker, Barber, Barclay, etc. This option will work for the *Last Name*, *First Name*, *Email*, and *Group Name* fields. However, it will not work for the *Number* field.
- You can use the asterisk character (\*) in place of the information you do not know. This can be used at the start, end or in the middle of the information you do know. For example, to look for a volunteer with the last name of "Bailey," you could use "Bai\*" or "\*ley" or "Ba\*ey". This feature will work in any of the fields including the *Number* field. For example, to search for a volunteer with the number of "1234567" you could enter "123\*" or "\*567" or "12\*67" in the *Number* field. Here is an example of how this could be used to find all volunteers with a Yahoo email domain:

## Find

Find from within all volunteer records

Last Name:	<input type="text"/>	<input type="button" value="Go"/>
First Name:	<input type="text"/>	<input type="button" value="Go"/>
Number:	<input type="text"/>	<input type="button" value="Go"/>
Email:	<input type="text" value="*@yahoo.com"/>	<input type="button" value="Go"/>
Group Name:	<input type="text"/>	<input type="button" value="Go"/>

Only one asterisk character (\*) will work as a replacement for information in the wildcard searches. For example, "\*\*ile\*" in the *Last Name* would not work to find a record with the last name of "Bailey." Also, only the asterisk is a valid wildcard character for the *Find* fields. Other characters such as a question mark (?) are not valid in this location. However, the column headings shown in the Sort & Search Records section below do support other wildcard characters.

## Sort & Search Records

### Sorting Records

When the Volunteers page shows more than one record, the page is initially sorted alphabetically according to the volunteer's last name. To help you find certain records, you can click on a column heading to re-sort the page according to that column's information.

Showing 1 to 166 of 166 entries

Name	Tag	Number	Status	Type	Last Activity	
<input type="text" value="Search"/>		<input type="text" value="Search"/>	<input type="text"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>	S
Armstrong, Mary	<input type="checkbox"/>	816	Applicant	Adult	06-11-2013	
Baccus, Lydia	<input type="checkbox"/>	774	Active	Adult	12-18-2014	08-
Bailey, Victor	<input type="checkbox"/>	1155	Applicant	Adult	06-11-2013	
Bargas, Jessica	<input type="checkbox"/>	830	Applicant	Adult	06-11-2013	
Barker, Geraldine	<input type="checkbox"/>	910	Active	Adult	12-17-2014	03-

For example, if the volunteer's Date of Last Activity is included on this page, you can sort the page from the earliest to the most recent date by clicking the *Last Activity* heading. Click the heading again to sort the page to display the most recent dates at the top and the earliest dates at the bottom.

You can even sort the page based on the information in multiple columns. For example, you can sort the page according to the volunteer's Status first by clicking on the heading of the *Status* column. You can then sort the records again according to the volunteer's Type by holding down the *SHIFT* key on your keyboard while clicking on the heading of the *Type* column. The original sorting by Status will be maintained and then the records will be sorted by Type.


**Please note:** It is not possible to sort columns with icons or checkboxes such as the Tag column, or the email validity or text number validity indicator columns.

### Searching for Records

There are various ways you can search for just certain records in Volgistics.

One way is to create a Set to query the database based on certain conditions such as how much service a volunteer has recorded. Sets can be created based on any of the rules shown in help topic 2177. After you create the Set, you can see the volunteers the Set contains by selecting the Set from the dropdown as shown in the Using Include Options section above.

Another way you can find certain records without creating a Set is to use the *search* options on the Volunteers page. Once you have a group of records showing on the page, you can search for certain records in two different ways. One is to use the *Search* box that appears in the top right corner to search the entire page.

 Search:

Previous 1 Next

Status	Type	Email	Last Activity	Start
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Applicant	Adult	maryearmstrong@pookmail.com	06-11-2013	
Active	Adult	lydiarbaccus@mailinator.com	12-18-2014	08-08-2012
Applicant	Adult	victorbailey@dodgit.com	06-11-2013	
Applicant	Adult	iessicarharnas@dodgit.com	06-11-2013	

The other is to use the search fields that appear at the top of each column. The search function looks for your input from left to right in the field. So, for example, if you need to find a volunteer with a certain last name and you can only remember that it starts with "Fr," enter "Fr" in the search field in the *Name* column to bring up all volunteers whose last names begin with "Fr."

Showing 1 to 3 of 3 entries (filtered from 166 total entries)

Name	Tag	Number	Status	Type	Email
<input type="text" value="Fr"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Freitas, Elaine	<input type="checkbox"/>	1108	Active	College	elainejfreitas@pookm
French, Robert	<input type="checkbox"/>	1205	Active	Adult	robertjrench@spamb
Fryer, Bobbie	<input type="checkbox"/>	1227	Active	Adult	bobbiewfryer@dodgit

The more characters you type in, the more refined your search will be. To return to the un-filtered view. Just remove the characters you entered into the search field using the delete or backspace keys on your keyboard.

You can narrow your search still further by searching for information in multiple columns. Using the example we started above, you could narrow your search for volunteers with last names beginning with "Fr" to just those who have the *College*Type. To do this you would enter "Co" (or more characters if you wish) in the search field at the top of the Type column.

Showing 1 to 1 of 1 entries (filtered from 166 total entries)

Name	Tag	Number	Status	Type	Email
<input type="text" value="Fr"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="Co"/>	<input type="text"/>
Freitas, Elaine	<input type="checkbox"/>	1108	Active	College	elainejfreitas@pookm

If you need to skip information, or look for just certain information anywhere in the field, the search will allow you to use some regular expressions. If you are unfamiliar with these, you may need to use a web search or find another source of information on how to perform more advanced searches.

Here's an example of a simple way regular expressions could be used on the page. Let's say you have a cleanup event at neighborhood park on a street called Cherry Ridge Drive. You want to find the volunteers on Cherry Ridge regardless of their house number. In this case, you could use the escape (\) or wildcard (\*) characters in front of "Che" in the Street column to bring up records for your volunteers on Cherry Ridge Drive.

Showing 1 to 3 of 3 entries (filtered from 168 total entries)

Name	Tag	Street	City	State
<input type="text" value="Search"/>		<input type="text" value="*Che"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>
Baccus, Lydia	<input type="checkbox"/>	4632 Cherry Ridge Drive	Wyoming	MI
Ford, Louise	<input type="checkbox"/>	1548 Cherry Ridge Drive	Wyoming	MI
Swindale, William	<input type="checkbox"/>	3022 Cherry Ridge Drive	Wyoming	MI

Here is another example of using regular expressions to filter the page. Let's say you've included the volunteers' Date of Last Activity on the Volunteers page. (Help topic 1202 shows how you can control which fields appear on the Volunteers page.) You may want to filter the page to show just the volunteers who have a blank in the field (in other words, they do not have any service information recorded). To do this, enter the regular expression ^\$ into the Search field. The page will filter to show just the volunteers who do not have a date recorded in the Date of Last Activity field. Or, if you want to do the opposite and filter the page to just show volunteers *with* a date entered, enter the regular expression \d into the Search field. Now the page will be filtered so that volunteers with a blank in the field are not shown.

### Status Field Search

Because each volunteer record can only have one Status, the Status search field is a dropdown list that contains all the options for Statuses in your account instead of a text field.

### Related help

- Help Topic 1202 - How to customize which fields appear in the volunteer list
- Help Topic 1998 - Finding Archived Volunteer Records
- Help Topic 2291 - Why can't I see or find volunteer records?
- Help Topic 2311 - How do I restore a deleted volunteer record?

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## How to Delete Schedule Openings

Help topic 2030

Added or revised 10-18-2016

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After creating a schedule you may decide you want to remove, delete or otherwise change the way you have setup your schedule openings. This help topic explains how to reduce or remove openings. If you'd like to make changes to the opening, see help topic 2132.

Because working with openings can have a dramatic impact on your entire schedule very quickly, we **strongly** recommend reviewing the information in the Tips for Working with Openings section before proceeding to other sections. The sections of the help topics are arranged according to how much impact they will have on your schedule. The top section will have the *least* impact on your overall schedule, and the bottom section will have the *most* impact on your overall schedule.

You can click on a link in the *Contents* box below to go directly to a section of the help topic.



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### Tips for Working with Openings

In Volgistics, openings are used to show the shifts or times when you will need volunteers to perform an assignment (a job or task) for your organization. You can learn how to create openings for an assignment in help topic 2158.

Here are some things to keep in mind when you're working with openings.

1. One opening can have multiple slots based on the number you enter in the *Volunteers needed* field when you create the opening. On the daily view of the schedule pictured below, there are two openings. One opening from 8:00 am to 11:30 am with 3 slots, and one opening from 12:00 pm to 3:30 pm with 2 slots.

From	To	Tag	Volunteer	Reg	Sub	Note	Opening
<input type="checkbox"/>	8:00 a	11:30 a					Fill Close Edit Delete
<input type="checkbox"/>	8:00 a	11:30 a					Fill Close Edit Delete
<input checked="" type="checkbox"/>	8:00 a	11:30 a	<input type="checkbox"/>	Fryer, Bobbie		✓	Edit Remove Edit Delete
<input type="checkbox"/>	12:00 p	3:30 p					Fill Close Edit Delete
<input checked="" type="checkbox"/>	12:00 p	3:30 p	<input type="checkbox"/>	Griffin, Deidre			Edit Remove Edit Delete

2 volunteers scheduled, 3 unfilled openings [Remove all](#)

*When you're working with openings, keep in mind that deleting the opening will remove all slots related to that opening.*

2. Openings can be setup to take place on one day only (one time), or they can be setup to repeat in a pattern (ongoing). An example of an ongoing opening is one that repeats every Monday, Tuesday, and Wednesday. On the monthly view of the schedule pictured below, the 8:00 am to 11:30 am opening repeats on Mondays, Tuesdays, and Wednesdays, and the 12:00 pm to 3:30 pm opening repeats on Mondays and Tuesdays.

Mon	Tue	Wed
<b>Mar 28</b>	<b>Mar 29</b>	<b>Mar 30</b>
<b>4</b> <input type="checkbox"/> 8:00 a - 11:30 a <input type="checkbox"/> 8:00 a - 11:30 a <input checked="" type="checkbox"/> 8:00 a - 11:30 a Bobbie Fryer <input type="checkbox"/> 12:00 p - 3:30 p <input checked="" type="checkbox"/> 12:00 p - 3:30 p Deidre Griffin	<b>5</b> <input type="checkbox"/> 8:00 a - 11:30 a <input type="checkbox"/> 8:00 a - 11:30 a <input type="checkbox"/> 8:00 a - 11:30 a <input type="checkbox"/> 12:00 p - 3:30 p <input type="checkbox"/> 12:00 p - 3:30 p	<b>6</b> <input type="checkbox"/> 8:00 a - 11:30 a <input type="checkbox"/> 8:00 a - 11:30 a <input checked="" type="checkbox"/> 8:00 a - 11:30 a Bobbie Fryer
<b>11</b> <input type="checkbox"/> 8:00 a - 11:30 a <input type="checkbox"/> 8:00 a - 11:30 a <input checked="" type="checkbox"/> 8:00 a - 11:30 a Bobbie Fryer <input type="checkbox"/> 12:00 p - 3:30 p <input type="checkbox"/> 12:00 p - 3:30 p	<b>12</b> <input type="checkbox"/> 8:00 a - 11:30 a <input type="checkbox"/> 8:00 a - 11:30 a <input type="checkbox"/> 8:00 a - 11:30 a <input type="checkbox"/> 12:00 p - 3:30 p <input type="checkbox"/> 12:00 p - 3:30 p	<b>13</b> <input type="checkbox"/> 8:00 a - 11:30 a <input type="checkbox"/> 8:00 a - 11:30 a <input checked="" type="checkbox"/> 8:00 a - 11:30 a Bobbie Fryer
<b>18</b>	<b>19</b>	<b>20</b>

Keep in mind that deleting an opening will remove it from every day of the week the opening occurs. This will be for all dates in the past as well as all dates in the future.

3. Volunteers can be scheduled to fill an opening for one day only, or on a repeating basis such as every Monday and Wednesday. If a volunteer is scheduled on an ongoing (repeating) basis, the daily schedule will indicate this with a checkmark in the *Reg* column. In the example pictured below, Bobbie Fryer is scheduled on a repeating basis, and Deidre Griffin is only scheduled for one day.

From	To	Tag	Volunteer	Reg	Sub	Note	Opening			
<input type="checkbox"/> 8:00 a	11:30 a						Fill	Close	Edit	Delete
<input type="checkbox"/> 8:00 a	11:30 a						Fill	Close	Edit	Delete
<input checked="" type="checkbox"/> 8:00 a	11:30 a	<input type="checkbox"/>	Fryer, Bobbie	✓			Edit	Remove	Edit	Delete
<input type="checkbox"/> 12:00 p	3:30 p						Fill	Close	Edit	Delete
<input checked="" type="checkbox"/> 12:00 p	3:30 p	<input type="checkbox"/>	Griffin, Deidre				Edit	Remove	Edit	Delete

2 volunteers scheduled, 3 unfilled openings Remove all

When you're working with openings, keep in mind that deleting an opening, **and** selecting to remove the volunteers scheduled for the opening, will remove volunteers scheduled on an ongoing (regular) basis on every date they're scheduled (both past and future).

4. Openings are not the same as schedule entries. You can think of an opening slot as a container that can hold a schedule entry, but the opening and the schedule entry are still independent of each other. Volunteers can be placed on the schedule without filling an opening slot, they can be placed on the schedule as filling an opening but with different start and/or stop times than the opening, or they can be placed on the schedule as filling the opening with the same start and stop times as the opening.

In the example shown below, Victoria Perry has been placed on the schedule without filling an opening. This creates a schedule entry for Victoria that is not associated with an opening. It's easy to tell she's not filling an opening because the schedule icon shows a figure without a box around it.

Deidre Griffin has been placed on the schedule as filling an opening. By default, her schedule entry had the same start and stop times as the opening. However, her schedule entry was edited to have different start and stop times than the opening. The schedule entry is still associated with the opening though. It's easy to tell because the schedule icon shows a figure with a box around it.

Opening	From	To	Tag	Volunteer	Reg	Sub	Note	Fill	Close	Edit	Delete
	11:30 a	11:30 a		Flyer, Debbie						Edit	Remove
	12:00 p	3:30 p		Perry, Victoria				Edit	Remove		
	12:00 p	3:30 p						Fill	Close	Edit	Delete
	12:00 p	3:30 p		Griffin, Deidre (12:30 p to 4:00 p)				Edit	Remove	Edit	Delete

3 volunteers scheduled, 3 unfillable openings Remove all

When you're working with openings, keep in mind that schedule entries are independent of openings. A volunteer can be filling an opening, but not be scheduled for the same start and stop times as the opening. Also, if you delete an opening you can choose to leave volunteers on the schedule. In this case, they will on the schedule but not as filling the opening like Victoria Perry in the example above.

### Reduce the Number of Volunteers Needed on Just One Day

One opening can have multiple opening slots as noted in the Tips for Working with Openings section above. You may want to reduce the number of slots for the opening on just one day. For example, if you anticipate that fewer volunteers will be needed on that day. Here are the steps to take if you need to do this:

1. Choose Assignments from the menu.
2. Click on the Assignment where you want to reduce the number of volunteers needed.
3. Click on the Schedule tab.
4. If you are on the monthly calendar view, click on the date the opening is on. If you're in the daily view, use the date dropdown at the top to select the date and then click the **Go** button.
5. If volunteers are scheduled to fill the opening slot, you will need to remove the volunteer from the schedule first. To do this, click the *Remove* link in the row that shows the volunteer you need to remove.

Opening	From	To	Tag	Volunteer	Reg	Sub	Note	Fill	Close	Edit	Delete
	8:30 a	11:30 a						Fill	Close	Edit	Delete
	8:30 a	11:30 a						Fill	Close	Edit	Delete
	8:30 a	11:30 a		Griffin, Deidre				Edit	Remove	Edit	Delete
	8:30 a	11:30 a		Perry, Victoria	<input checked="" type="checkbox"/>			Edit	Remove	Edit	Delete

2 volunteers scheduled, 2 unfillable openings Remove all

If the volunteer is a regularly scheduled volunteer (shown with a check in the *Reg* column), select to remove them from one day only or from all days they are scheduled for. If you remove them from one day only, you will see their name grayed out on the schedule with (*removed*) behind it.

6. Click the *Close* link in the row for the opening slot you no longer need.

	From	To	Tag	Volunteer	Reg	Sub	Note	Opening			
<input type="checkbox"/>	8:30 a	11:30 a						Fill	Close	Edit	Delete
<input type="checkbox"/>	8:30 a	11:30 a						Fill	Close	Edit	Delete
<input type="checkbox"/>	8:30 a	11:30 a						Fill	Close	Edit	Delete
<input type="checkbox"/>	8:30 a	11:30 a		(closed)				Open		Edit	Delete
	8:30 a	11:30 a	<input type="checkbox"/>	Pery, Victoria (removed)		✓		Return			
0 volunteers scheduled, 3 unfilled openings									Return all		

The opening slot will appear grayed out, and there will be an *Open* link to click if you want to make the opening slot available again.

7. Repeat these steps for each opening slot you need to close.

### Reduce the Number of Volunteers Needed on Multiple Days

As noted in the Tips for Working with Openings section above, an opening can be setup to repeat in a pattern such as on every Monday, Tuesday, and Wednesday. You may want to reduce the number of slots for the opening on every day it occurs. For example, if you found you routinely only need two volunteers to do a job instead of four. This section shows the steps you'll need to take to reduce the number of volunteers needed on every day that the opening occurs.

#### Please Note!

There is not a way to reduce the number of opening slots for just one day of the week. For example, if the opening repeats every Monday, Tuesday, and Wednesday with four slots on each day, there is not a way to change just Tuesdays to have two slots but leave four slots on Mondays and Wednesdays.

If you only need to make this change for a few Tuesdays, just follow the steps in the Reduce the Number of Volunteers Needed on Just One Day section above to reduce the number of opening slots on those days. If you need to make a permanent change for all Tuesdays, you will need to edit the original opening to take place on just Mondays and Wednesdays. Then, make a new opening that repeats every Tuesday with just two slots. If you do this, any volunteers scheduled on Tuesdays will be left on the schedule, but not as filling an opening slot. You will need to go back and remove them from the schedule, and then place them back on as filling an opening slot. Here are the steps to take to reduce the opening slots on every day that the opening occurs:

1. Choose Assignments from the menu.
2. Click on the Assignment where you want to reduce the number of volunteer needed.
3. Click on the Schedule tab.
4. If you are on the monthly calendar view, click any date the opening occurs on. If you're in the daily view, use the date dropdown at the top to select a date the opening occurs on, and then click the **Go** button.

5. Click the *Edit* link in the Opening column for any row of the opening's slots. If a volunteer is scheduled to fill the opening slot, this will be the *Edit* link on the right.

	From	To	Tag	Volunteer	Reg	Sub	Note	Opening			
<input type="checkbox"/>	8:30 a	11:30 a						Fill	Close	Edit	Delete
<input type="checkbox"/>	8:30 a	11:30 a						Fill	Close	Edit	Delete
	8:30 a	11:30 a	<input type="checkbox"/>	Griffin, Deidre				Edit	Remove	Edit	Delete
	8:30 a	11:30 a	<input type="checkbox"/>	Perry, Victoria		✓		Edit	Remove	Edit	Delete
2 volunteers scheduled, 2 unfilled openings										Remove all	

6. In the *Edit an opening* box, change the number in the *Volunteers needed* field to be the number of opening slots you want the opening to have now.

7. Click the **Save** button.

**Please Note!**

Following the steps above could leave volunteers on the schedule but not as filling an opening slot. For example, if you reduced the number of opening slots from four to two, and there is a date where three volunteers were scheduled to fill opening slots, there will now be two volunteers filling opening slots and one volunteer on the schedule who is not filling an opening slot.

**Delete a One-Time Opening Completely**

There may be times when you need to completely eliminate an opening that occurs on one date. For example, if a board meeting was switched to a different date. If you are sure you want to delete all slots for a one-time opening on the date it occurs, follow these steps:

1. Choose Assignments from the menu.
2. Click on the Assignment where you want to delete an opening.
3. Click on the Schedule tab.
4. If you are on the monthly calendar view, click on the date the opening is on. If you're in the daily view, use the date dropdown at the top to select the date and then click the **Go** button.
5. You may wish to verify that the opening is a one-time opening instead of an ongoing opening. If you want to do this, click the *Edit* link in any row for the opening you wish to delete. If a volunteer is scheduled to fill the opening slot, this will be the *Edit* link on the right side.

	From	To	Tag	Volunteer	Reg	Sub	Note	Opening			
<input type="checkbox"/>	7:00 a	10:30 a						Fill	Close	Edit	Delete
<input type="checkbox"/>	7:00 a	10:30 a						Fill	Close	Edit	Delete
	7:00 a	10:30 a	<input type="checkbox"/>	Landers, Sandra				Edit	Remove	Edit	Delete

Check in the *Edit an opening* box to see if the opening is setup as *For one day only* or *Ongoing*. If it is setup as *Ongoing* see the *Delete an Ongoing Opening Completely* section of this help topic.

6. Once you verify that the opening is a one-time opening and you are sure you wish to delete it, click the *Delete* link in one of the rows for the opening's slots.

7. If no volunteers are scheduled to fill any of the opening's slots, the opening will be deleted.

If there are volunteers with a schedule entry associated with the opening, a *Delete Opening?* box will appear. Select to either delete the opening *and* the volunteers scheduled to fill the opening, or to delete the opening but leave scheduled volunteers on the schedule as not filling an opening.

8. Click the **Continue** button if you made a selection in step 7 and wish to proceed with deleting the opening. Click the **Cancel** button if you no longer wish to delete the opening.

### Delete an Ongoing Opening but Leave past Schedule

There may be times when you want to end an ongoing opening, but leave the past schedule for the opening intact. For example, if a shift will occur at new times it is sometimes easier to end the old opening and enter a new opening with the new times. *Following these steps can have an impact on your overall schedule. Please review the information in the **Please Note!** box below before proceeding.*

If you'd like to end an ongoing opening, but leave the past schedule intact, follow these steps:

1. Choose Assignments from the menu.
2. Click on the Assignment where you want to delete an opening.
3. Click on the Schedule tab.
4. If you are on the monthly calendar view, click on the date you want to end the opening on. If you're in the daily view, use the date dropdown at the top to select the date and then click the **Go** button.
5. Click the *Edit* link in any row for the opening you wish to end. If a volunteer is scheduled to fill the opening slot, this will be the *Edit* link on the right side.

	From	To	Tag	Volunteer	Req	Sold	Note	Opening			
<input type="checkbox"/>	7:00 a	10:30 a						Fill	Close	Edit	Delete
<input type="checkbox"/>	7:00 a	10:30 a						Fill	Close	Edit	Delete
<input checked="" type="checkbox"/>	7:00 a	10:30 a		Landers, Sandra				Edit	Remove	Edit	Delete

6. In the *Edit an opening* box, change the setting under the *Starting* date field from *Ongoing* to *Ending*. Select the date you want the opening to end from the dropdown lists.

7. Click the **Save** button.

### Please Note!

1. Following these steps will remove all future instances of the opening, but it will not remove volunteers who are scheduled to fill the opening in the future. You will need to remove these volunteers individually if you do not want them on the schedule.
2. If you want to remove volunteers from the future schedule, but leave their past schedule intact, you will need to edit their schedule entry and put in an ending date.
3. If you want to remove the volunteers from the schedule completely (for the past and future), simply remove them from the schedule.
4. This section of the help topic can be used to preserve the past schedule for volunteers, but this does *not* mean the past schedule is recorded as volunteer service. Service hours must be entered using one of the methods shown here.
5. Volgistics does not maintain schedule information indefinitely. The schedules for past years drop from the system. If you want a permanent record of when volunteers served, you must enter service hours.

### Delete an Ongoing Opening Completely

There may be times when you want to completely delete an ongoing opening. Remember to review the information in the Tips for Working with Openings section above before taking this action! *Deleting an ongoing opening will delete **all** instances of the opening on dates in the past as well as in the future. Also, deleting the opening will remove **all** opening slots for the opening on **every** date the opening occurs.*

If you are sure you want to delete all slots for an ongoing opening on each date it occurs (past and future), follow these steps:

1. Choose Assignments from the menu.
2. Click on the Assignment where you want to delete an opening.
3. Click on the Schedule tab.
4. If you are on the monthly calendar view, click on the date the opening is on. If you're in the daily view, use the date dropdown at the top to select the date and then click the **Go** button.
5. Click the *Delete* link in one of the rows for the opening's slots.

	From	To	Tag	Volunteer	Reg	Sub	Note	Opening			
<input type="checkbox"/>	8:30 a	11:30 a						Fill	Close	Edit	Delete
<input type="checkbox"/>	8:30 a	11:30 a						Fill	Close	Edit	Delete
	8:30 a	11:30 a	<input type="checkbox"/>	Griffin, Deidre	✓			Edit	Remove	Edit	Delete
	8:30 a	11:30 a	<input type="checkbox"/>	Perry, Victoria	✓			Edit	Remove	Edit	Delete
2 volunteers scheduled, 2 unfilled openings										Remove all	

6. In the *Delete Opening?* box, select to either delete the opening *and* the volunteers scheduled to fill the opening, or to delete the opening but leave scheduled volunteers on the schedule as not filling an opening.

*Remember that if you choose to delete the volunteers scheduled to fill the opening, that the past and future date the volunteers were scheduled will be deleted.*

7. Click the **Continue** button if you made a selection in step 7 and wish to proceed with deleting the opening. Click the **Cancel** button if you no longer wish to delete the opening.

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## Working with Tags

Help topic 2137

Added or revised 04-19-2017

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Once you've tagged one or more volunteer records, there are a variety of useful things you can do for the entire group of tagged records. Please keep in mind that tags are cumulative for your session unless they are cleared. For example, if you tag 8 records and perform a task, and then tag 5 more records without clearing your tags, the next task you perform for tagged records will be made on 13 records. See the Clear Tags section of this help topic for information on how to clear tags between tasks.

Click on a link in the *Contents* box below to be taken directly to that section of this help topic.

### Contents

- View the tagged volunteers
- Print a report for the tagged volunteers
- Send email, VIC mail, or text messages to the tagged volunteers
- Change the Status for all of the tagged records
- Add a Type or Flag entry to the tagged records
- Delete the tagged records
- Archive the tagged records
- Send a VicNet password link to the tagged records
- Set temporary VicNet passwords for all tagged volunteers
- Send the text messaging opt-in email to the tagged records
- Add a Site to the tagged records
- Insert Date records for the tagged volunteers
- Add an Assignment to all of the tagged records
- Add a Mandate to all of the tagged records
- Send a schedule reminder to all of the tagged volunteers
- View the tagged volunteers**
- Clear tags**




You can view a list of the volunteer records that are currently tagged (or un-tagged).


1. From the menu, choose Volunteers.
2. Under the Include section, click the Clear link to clear any previous include settings.
3. Under the Include section, select *Tagged* from the Tags field (or *Not tagged* to see the list of un-tagged volunteers).


## 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](#)


### Include


Status:  Any ▼


Type:  Any ▼

Flag:  Any ▼

Site:  Any ▼

Set:  Any ▼

Tags:  **Tagged** ▼

Kind:  Any ▼


[↑ Clear](#)


4. Click the All link near the top of the Volunteers page. Volgistics displays a list of all the volunteers whose records are currently tagged (or un-tagged if you chose to include un-tagged volunteers).


## 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](#)


### Include


Status:  Any ▼


Type:  Any ▼

Flag:  Any ▼

Site:  Any ▼

Set:  Any ▼

Tags:  **Tagged** ▼

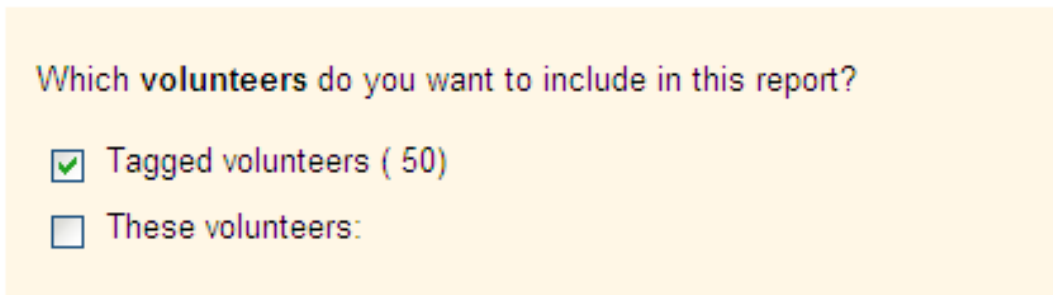
Kind:  Any ▼

[↑ Clear](#)

### Print a report for the tagged volunteers

Most reports provide a way for you to print the report for just the tagged records. For example, you can tag a group of volunteers and then print mailing labels for them. For more information on stock reports, please see help topic 2104. For more information on custom reports, please see help topic 2223.

1. From the menu, choose Print.
2. Choose the kind of report you would like to print, for example Address labels.
3. Click on the name of the report you want to print.
4. Click the **Print it** button.
5. On the Include page, check *Tagged volunteers* and uncheck *These volunteers*, as shown here:

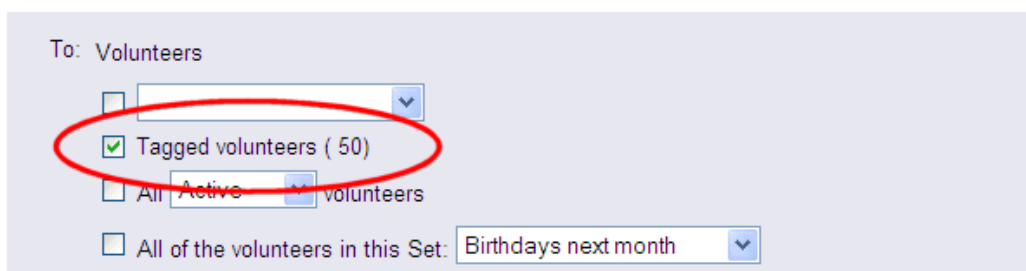


Not all reports are driven by volunteer records. Those that are not, do not offer the *Tagged volunteers* checkbox on the Include page.

6. Click the **Start printing** button.  
**Send email, VIC mail, or text messages to the tagged volunteers**

It's easy to send an email, VIC mail, or text message to a group of tagged volunteers.

1. From the menu, choose Mailbox.
2. Select the Out Box tab, and then click the **Send a message** button.
3. In the *To* section, check *Tagged volunteers*.



4. Compose and then send your message.  
**Change the Status for all of the tagged records**

To change the volunteer Status for multiple volunteers at one time, take these steps:

1. From the menu, choose Tags.

2. Next to *Change the **Status** of all tagged volunteer records to*, select the Status you would like to switch your tagged volunteers to from the dropdown list.

3. Click the **Go** button.

### **Add a Type or Flag entry to the tagged records**

There may be occasions when you want to add the same Type or Flag entry to a lot of volunteer records. You can add these all at once using tags.

If the Type or Flag entry you want to make does not already appear as a Type or Flag option on the Core tab, you should start by creating it (you can skip this step if the Type or Flag entry you want to add already exists in your database):

1. From the menu, select Setup.
2. Click *Field options*, and then select *Core tab* (the Core tab is where the Flag and Type fields are found).
3. Select Types or Flags, as appropriate.
4. Enter the new Type or Flag in the *Add a new item* field, and then click the **Save** button.

Once the Type or Flag value you want to add exists in your database, it's easy to insert it into all of the tagged records:

1. From the menu, choose Tags.
2. If you want to add a Type entry to all of the tagged records, use the *Change the **Type** of all of the tagged volunteers to* field to choose the Type you want to add.

If you want to add a Flag entry to all of the tagged records, use the *Add this **Flag** to all of the tagged records* field to choose the Flag you want to add.

3. Click the **Go** button.

Volgistics inserts the Type or Flag entry into all of the tagged records.

### **Delete the tagged records**

You can delete multiple volunteer records at once by using the tags feature. Because deleting a record can have a permanent impact on your volunteer recordkeeping, *we recommend reading the Important Considerations Before Deleting Records* section of help topic 2309 before proceeding.

After you have tagged the volunteer records you want to delete, follow these steps to delete the records:

1. From the menu, choose Tags.
2. Click the **Go** button located next to *Delete the tagged volunteer records*.
3. Because deleting records permanently removes them from the account, a confirmation box will appear where you must verify that you want to delete the records.

If your account has the VicDocs feature enabled, the confirmation box will also include an option to save or delete the documents associated with the records. If you select to save the documents, they will be available on the In Box in your mailbox for 5 days. If you do not save the documents locally during these 5 days, there will not be a way to recover them.

### **Operator Rights and Deleting Tagged Records**

If you do not see the **Delete the tagged volunteer records** option on the Tags menu, your Volgistics System Operator rights do not permit you to delete volunteer records. Your System Operator rights are set by your organization's Volgistics Administrator.

#### **Archive the tagged records**

Archiving volunteer records allows you to move records for volunteers who are not actively serving to a separate section of your database. If you are not familiar with how this affects volunteer records, we recommend reviewing help topic 1999 "Archived Versus Non-archived Records" before proceeding.

If you want to archive a group of volunteer records, you can tag those volunteers and then archive all of their records in one step:

1. From the menu, choose Tags.
2. Click the **Go** button located next to **Archive the tagged volunteer records**.

Volgistics will archive all of the tagged records.

### **Operator Rights and Archiving Tagged Records**

If you do not see the **Archive the tagged volunteer records** option on the Tags menu, your Volgistics System Operator rights do not permit you to archive volunteer records. Your System Operator rights are set by your organization's Volgistics Administrator.

#### **Send a VicNet password link to the tagged records**

If you want to provide a number of volunteers with their VicNet password at once, using tags will allow you to do so more efficiently than sending password messages from each individual volunteer's Vic tab. Volunteers who have opted-in to text messaging will receive the password by text and by email. Volunteers who have not opted-in to text messaging will only receive the password by email.

You can customize the content of the email message volunteers receive with the link. The *Send a Message with Login Information* section of help topic 1158 has more information on how to do this. You can find this section of the help topic here.

To send all tagged volunteers a message containing a VicNet password link:

1. Choose Tags from the menu.
  2. Click the **Go** button located next to **Send a VicNet password link to the tagged volunteers**.
- #### **Set temporary VicNet passwords for all tagged volunteers**

There may be times when you want to set a temporary password that volunteers use to login to VicNet for the first time. For example, if you have volunteer orientations where you will train groups of volunteers all at once, you can set the same temporary password for the entire group and tell them the temporary password. Or, you may give out packets to new volunteers where you have instructions on how to login, and you give the temporary password in the instructions. When volunteers login with the temporary password the first time, they will be prompted to select a permanent password.

To assign a temporary password to all tagged volunteers:

1. Choose Tags from the menu.

2. Enter the temporary password in the field located next to *Set **temporary VicNet passwords** for all tagged volunteers*. This password does not need to meet any password strength rules you have set for volunteers because volunteers are required to set a permanent password the first time they login.

3. Click the **Go** button.

### **Send the text messaging opt-in email to the tagged records**

If you have enabled text messaging for your account, you will see an option to send volunteers an email message asking them to opt-in to text messaging. To send this email message:

1. Choose Tags from the menu.

2. Click the **Go** button located next to *Send the **text message opt-in email** message to the tagged volunteer records*.

The system will send the default message from the Messages Ground Rules page to all of the tagged records except for the ones where the volunteer has already opted-in to text messaging. You can find more information on how to edit the default message in the *Communicate that Text Messaging is Available* section of help topic 1301.

### **Add a Site to the tagged records**

If you use Site Level Access, you can use tags to add a Site to the Core tabs of a group of volunteers in a single step. To do this:

1. From the menu, choose Tags.

2. Select the name of the Site you would like to add from the dropdown list next to *Add this **Site** to the tagged volunteer records*.

3. Click the **Go** button.

### **Insert Date records for the tagged volunteers**

There may be times when you want to add the same Date record for many volunteers. For example, you might want to enter the same Training Date record for all of the volunteers who attended a particular orientation session. Start by tagging the volunteers, who attended the session, then:

1. From the menu, choose Tags.

2. In the *Add this **Date** to all of the tagged volunteer records* section, enter the date record information you want to add to all of the tagged records. **Please note:** If you're adding a Checklist date and the Checklist item recurs on an annual or periodic basis, you will need to manually calculate the next due date and enter this in the Expires field. The system will *not* automatically calculate and insert an expiration date when the date is added from the Tags menu.

3. Click the **Go** button.

Volgistics inserts the Date record into all of the tagged records.

### **Add an Assignment to all of the tagged records**

If you would like to add the same Assignment to the Service tab of multiple volunteers at once, you can do this by:

1. From the menu, choose Tags.

2. In the *Add this **Assignment** to all of the tagged volunteer records* section, choose the name of the Assignment to be added from the dropdown list.
3. Select the Role that tagged volunteers should be given in the chosen Assignment.
4. Enter an Assignment "From" date and "To" date, if applicable.
5. Click **Go**.

#### **Add a Mandate to all of the tagged records**

If your organization uses Volgistics' Mandatory Service features to track volunteer progress toward service goals or requirements, there might be a need to add a service mandate to numerous records at once. You can do this by:

1. From the menu, choose Tags.
2. In the *Add this **Mandate** to all of the tagged volunteer records* section, select the applicable Mandatory Service program from the dropdown list.
3. Choose a Starting date for the service mandate, if applicable.
4. Enter a Due by date for the service mandate, if applicable.
5. Enter the number of Hours and/or Service Measures required.
6. Click the **Go** button.

#### **Send a schedule reminder to all of the tagged volunteers**

If you use Volgistics' on-demand schedule reminders feature, you can send schedule reminders for a range of dates you specify. When you send schedule reminders through the *Monthly & on-demand volunteer reminders* setup page, they are sent to every volunteer who has an email address and/or text number on their record, is scheduled during the selected date range in any of the assignments for which the *Schedule reminders* checkbox is checked, and has not declined schedule reminder messages.

There may be a situation, however, when an organization wants to send schedule reminders only to a specific sub-group of those who would normally receive the reminders. In this case, they should take the following steps to send schedule reminders for specific dates to tagged volunteers:

1. From the menu, choose Tags.
2. Next to *Send a **schedule reminder** to all of the tagged volunteers for these dates*, choose the dates for which the schedule reminder should be sent.
3. Click the **Go** button.

The message will be sent by email or text depending on if the volunteer has opted-in to text messaging and his or her message preferences.

#### **Clear Tags**

It's a good idea to clear the tags whenever you finish using them to perform a particular task. You can always clear tags from individual records by un-checking the Tags checkbox. You can also clear tags from all records at once by:

1. From the menu, choose Tags.
2. Click the **Clear all tags** button.

If the button appears grayed out, there are not any tagged records to clear.

### **Related help**

Help Topic 1220 - Print a Report for a Single Archived Volunteer

Help Topic 2136 - Tags

Help Topic 2139 - Tagging Volunteer Records

Help Topic 2140 - How to permanently mark tagged records

Help Topic 2160 - Update Youth Volunteers upon Adulthood

Help Topic 2322 - Print a Report for a Single Volunteer

Help Topic 2233 - Sending All Volunteers Their VicNet Passwords in One Step

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## **Schedule Rules**

Help topic 2172

Added or revised 09-19-2016

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Every Assignment you track in Volgistics may optionally include a volunteer schedule.

You can tailor the way each Assignment's schedule works, depending on the needs of the Assignment. For example, you can have some Assignments for which volunteers must serve only on specific dates at specific times (these are called openings), while other Assignments may permit scheduling on any dates or times.

The Rules tab in the Assignment record is where you specify how you want the schedule to work for a specific Assignment. If you're not already on the Rules tab you can get there like this:

1. Choose Assignments from the menu.
2. Select the Assignment for which you want to set up a schedule.
3. Click on the Rules tab.

(If you do not see the Rules tab, your Volgistics System Operator rights do not provide access to this area. If you have questions about your operator rights, contact your organization's Volgistics Administrator.)

You can click on a section of the help topic in the *Content* box below to go directly to that section.

### **Contents**

Who can sign-up for this schedule?

Allow scheduling for

The *Help Wanted* Icons Do Not Appear on the Calendar

Self-scheduling alerts

Other options

Make this the default setup

**Who can sign-up for this schedule?**

If you use the self-scheduling features, you can use the controls in this section to specify which volunteers are allowed to schedule themselves or be scheduled by a Coordinator for this Assignment. For example, you may have some Assignments that only 'Adult' volunteers may perform; or you may want volunteers to schedule

themselves or be scheduled by coordinators only for the Assignments to which they are specifically assigned (on their Service tab).

#### Volunteers cannot schedule themselves or be scheduled by coordinators

If you choose this option, no volunteers can be scheduled for this Assignment with the volunteer information center self-scheduling features. That is, volunteers are unable to schedule themselves for this Assignment, and Coordinators are also unable to schedule any volunteers in this Assignment. With this option selected, the only way volunteers will be scheduled in this Assignment is if you, or another Volgistics System Operator, specifically schedules them from within Volgistics.

#### Volunteers can schedule themselves or be scheduled by a coordinator if their record has...

Choose this option if you want certain (but not all) volunteers to be able to schedule themselves for this Assignment and you want Coordinators to be able to schedule some (but not all) of their volunteers for this Assignment. When you choose this option, you must use the following controls to specify which volunteers can be scheduled with the volunteer information center self-scheduling features:

- One of these volunteer Statuses:

Select the volunteer Status(es) that volunteers must have in order to be able to schedule themselves or be scheduled by Coordinators for this Assignment. For instance, check only 'Active' if you only want volunteers whose status is 'Active' to be able to schedule themselves. Each volunteer's Status is shown on their Core tab.

You may check any combination of Statuses.

If you want volunteers to be able to schedule themselves for this Assignment and Coordinators to be able to schedule their volunteers for this Assignment no matter what their Status is, check all of the Statuses. **You must select at least one Status in order for self scheduling to work.**

- One of these Roles in this assignment:

Use the checkboxes in this section if you only want volunteers to be able to schedule themselves or be scheduled by Coordinators if they have this Assignment (if this Assignment appears on the Service tab in their record). In this case, check the Role(s) that the volunteers must have in this Assignment in order for them to be able to schedule themselves or be scheduled by a Coordinator.

For example, if you only want to allow volunteers to schedule themselves or be scheduled by a Coordinator for this Assignment if their Role in the Assignment is 'Assigned,' then check the *Assigned* checkbox.

You may check any combination of Roles.

If you want volunteers to be able to schedule themselves or be scheduled by Coordinators for this Assignment even if they do not have this Assignment on their Assignment tab, do not check any of the Roles in this section.

- Include matched volunteers

If you use volunteer and Assignment matching, you can allow volunteers to schedule themselves or be scheduled by Coordinators for this Assignment if they are matched to the Assignment, regardless of their Role(s). If you have disabled the matching features, this checkbox will not appear.

- This Flag:



If you want volunteers to be able to schedule themselves or be scheduled by a Coordinator for this Assignment only if they have a particular Flag on their Core tab, select that Flag here.

For example, if you have a Flag for 'Red Team,' and only Red Team volunteers should be allowed to schedule themselves or be scheduled by a Coordinator for this Assignment, select the 'Red Team' Flag here.

- This Type:

If you want volunteers to be able to schedule themselves or be scheduled by Coordinators for this Assignment only if they have a particular Type on their Core tab, select that Type here.

For example, if you have a Type called 'Adult' and only Adult volunteers should be allowed to schedule themselves or be scheduled by Coordinators for this Assignment, select the 'Adult' Type here.

### Example

In the example configuration shown below for an Assignment called 'Tutor', volunteers can schedule themselves or be scheduled by a coordinator if they are 'Active' volunteers, and they are assigned to the Tutor Assignment with the Role of either 'Assigned,' 'Trainee,' or 'Substitute.'

#### Schedule openings & setup

**Who can sign-up for this schedule?**

Volunteers cannot schedule themselves or be scheduled by coordinators

Volunteers can schedule themselves or be scheduled by a coordinator if their record has...

One of these volunteer Statuses:

<input checked="" type="checkbox"/> Active	<input type="checkbox"/> Applicant	<input type="checkbox"/> Inactive
<input type="checkbox"/> LOA	<input type="checkbox"/> Prospect	<input type="checkbox"/> Sick
<input type="checkbox"/> Vacation		

One of these Roles in this assignment:

<input checked="" type="checkbox"/> Assigned	<input type="checkbox"/> Former	<input type="checkbox"/> Inactive
<input type="checkbox"/> Preference	<input type="checkbox"/> Referral	<input checked="" type="checkbox"/> Substitute
<input checked="" type="checkbox"/> Trainee		

Their Match is:

<input type="checkbox"/> Good	<input type="checkbox"/> Fair	<input type="checkbox"/> Marginal
-------------------------------	-------------------------------	-----------------------------------

This Flag:

This Type:

Any volunteer can schedule themselves or be scheduled by a coordinator

A volunteer with the Status and Assignment entries shown below would be able to schedule themselves or be scheduled by a Coordinator for the Tutor Assignment because their Status is 'Active' and they are assigned to the Tutor Assignment with one of the three required Roles (Substitute). If they did not have the Status 'Active,' or if they were not assigned to the Tutor Assignment with the role of 'Assigned,' 'Trainee,' or 'Substitute,' they would not be able to schedule themselves or be scheduled by a Coordinator for the Tutor Assignment in this example.

Core Profile Service Schedule History Contacts Notes Vic

Save Cancel Archive Delete Combine  Tagged New Previous Next

**Name**

Last name: Bailey Number: 3959100  
 First name: George Status: Active  
 Middle name: M Title: Mr Type: Adult

Core Profile Service Schedule History Contacts Notes Vic

Tagged New Previous Next

**Assignments**

Assignment	Role	From	To	
Tutor [Client Services]	Substitute			Edit Delete

Any volunteer can schedule themselves or be scheduled by a coordinator

Choose this option if you want *any* volunteers to be able to schedule themselves or be scheduled by a Coordinator for this Assignment.

**Allow scheduling for...**

Use this option to control the way volunteers may be scheduled for this assignment.

This option affects the way Volgistics System Operators may schedule volunteers for this Assignment on the Schedule tab of the volunteer record. If you use self-scheduling, this option also affects the way volunteers may schedule themselves as well as how Coordinators may schedule their volunteers for this Assignment.

Openings only

Select this option if you want to schedule volunteers in this Assignment only for specific days and times. This is the best option for Assignments where structured schedules are important; and when you need to have a specific number of volunteers scheduled.

When you select this option you must add one or more openings to the schedule.

When you select this option, and scheduling is done from the Schedule tab of the volunteer's record, System Operators can only add volunteers to this Assignment's schedule for the days and times for which there are openings. Once all of the openings are filled on a given date, no additional volunteers may be scheduled (unless you add more openings).

If you select this option and you use self scheduling, volunteers will only be able to schedule themselves in this Assignment for the days and times of your openings. Once all of the openings on a given date are filled, volunteers can no longer schedule themselves for that date (unless you add more openings).

### Any times on these days

Select this option if it is OK to schedule volunteers in this Assignment with any start and stop time, on any day or on specific days of the week. This is the best option for Assignments where structured schedules are not needed, such as self-paced or self-directed service; and when the number of volunteers scheduled for any day or time is not important.

When you select this option volunteers can be added to this schedule for any times on any of the days you mark here.

If you select this option and you use self-scheduling, volunteers will be able to sign themselves up for this Assignment on any day(s) you have indicated here, for any times they choose. Note that Coordinators are not able to schedule volunteers for 'any times,' so even when this option is selected Coordinators are only able to schedule their volunteers in existing schedule openings.

When you choose 'Any times,' the times volunteers may be scheduled are bound by the Hours of operation you set on the Scheduling Ground Rules page in Setup. For example, if you set your hours of operation to 7:00 a.m. through 10:00 p.m., volunteers may be scheduled for any times, but only between 7:00 a.m. and 10:00 p.m.

### **The Help Wanted Icons Do Not Appear on the Calendar**

The Volgistics Support Team often answers help inquires about why volunteers are not seeing the Help Wanted icons on the calendar. Here are four common reasons a volunteer will not see the icons:

1. There are not any opportunities to serve created in your account. If the Rules tab of the Assignment is configured for *Openings only*, there must be unfilled openings on the Assignment's schedule. If the Rules tab is configured for *Any times on these days*, there must be days of the week checked.
2. The volunteer must meet *all* of the requirements set on the Rules tab of the Assignment. For example, if the Rules tab is set to require the volunteer to have an Active Status, a Role of Assigned or Substitute, and a *CPR Certified*Flag, only volunteers who meet *all three* requirements will see the Help Wanted icons.
3. The opportunities to serve are outside of the date range settings on the VIC Self Scheduling setup page. For example, let's say you allow volunteers to schedule themselves one month in advance. If a volunteer views the schedule on September 3rd, openings on October 18th will not show because they are more than one month away.
4. If your organization uses Site Level Access, volunteers must have the Site the Assignment appears under listed on the Core tab of their record in order to see the Help Wanted icons for the Assignment. You can learn [how to add Sites to the Core tab of a volunteer record in help topic 2037](#).

### **Self-scheduling alerts**

If you use the VicNet or VicTouch modules, and you allow volunteers to add or remove themselves from schedules, you can send alerts to a specific Volgistics System Operator – and/or the Assignment's Coordinators – each time volunteers add or remove themselves from the schedule for the selected Assignment.

This capability aids in keeping staff and supervisors aware of any schedule changes, and it allows them the most time possible to reassess their service needs.

### **If a volunteer schedules themselves for this assignment**

Use this section if you want to send alerts when volunteers choose to *add* themselves to the schedule for this Assignment.

Send an alert to the Volgistics mailbox for this Volgistics operator

Marking this checkbox will cause an automatic alert to be sent to the In Box tab of the Volgistics Mailbox whenever volunteers *add* themselves to this Assignment's schedule. The alert will be visible to all operators who share the mailbox, but will show as being *To* the System Operator you choose from the dropdown list.

**Hint:** If there are multiple Volgistics System Operators who want to receive the alerts, or if the System Operators want to receive the alerts by email or text message, you can make each of these System Operators Coordinators for this Assignment. Then select the option below to send alerts to the Assignment's Coordinators.

Send an alert to this assignment's Coordinators

Marking this checkbox will cause an automatic alert to be sent to the Coordinators for this Assignment each time volunteers *add* themselves to the schedule for this Assignment. If your account has enabled text messaging, and the Coordinator has opted-in to text messaging, then the alert will be sent as a text message. Otherwise, the Coordinator will receive the alert by email.

If the Assignment has more than one Coordinator, the alerts will go to each of them. If a Coordinator does not have an email address in their Coordinator record, the alerts cannot be sent to them.

Send these alerts for

If you want to send these automatic alerts for all volunteers who add themselves to this schedule, select "Any volunteer who schedules themselves."

Alternatively, you may want to send these automatic alerts only when certain types of volunteers add themselves to this schedule. For example, you may only want to send these alerts for "Junior" volunteers and not "Adults." In this case, choose "Only volunteers who have," and then select a Flag, Type, or Kind value that identifies the type of volunteers for whom these alerts are to be sent. When you choose the "Only for volunteers who have" option, automatic alerts will not be sent when volunteers who do not have the selected Flag, Type or Kind add themselves to this Assignment's schedule.

**If a volunteer removes themselves from this assignment's schedule**

Use this section if you want to send alerts when volunteers choose to *remove* themselves from the schedule for this Assignment.

Send an alert to the Volgistics mailbox for this Volgistics operator

Marking this checkbox will cause an automatic alert to be sent to the In Box tab of the Volgistics Mailbox whenever volunteers *remove* themselves from this Assignment's schedule. The alert will be visible to all operators who share the mailbox, but will show as being *To* the System Operator you choose from the dropdown list.

**Hint:** If there are multiple Volgistics System Operators who want to receive the alerts, or if the System Operators want to receive the alerts by email or text message, you can make each of these System Operators Coordinators for this Assignment. Then select the option below to send alerts to the Assignment's Coordinators.

Send an alert to this assignment's Coordinators

Marking this checkbox will cause an automatic alert to be sent to the Coordinators for this Assignment each time volunteers *remove* themselves from the schedule for this Assignment. If your account has enabled text messaging, and the Coordinator has opted-in to text messaging, then the alert will be sent as a text message. Otherwise, the Coordinator will receive the alert by email.

If the Assignment has more than one Coordinator, the alerts will go to each of them. If a Coordinator does not have an email address in their Coordinator record, the alerts cannot be sent to them.

#### Send these alerts for

If you want to send these automatic alerts for all volunteers who remove themselves from this schedule, select "Any volunteer who removes themselves from the schedule."

Alternatively, you may want to send these automatic alerts only when certain types of volunteers remove themselves from the schedule. For example, you may only want to send these alerts for "Junior" volunteers and not "Adults." In this case, choose "Only volunteers who have," and then select a Flag, Type, or Kind value that identifies the type of volunteers for whom these alerts are to be sent. When you choose the "Only for volunteers who have" option, automatic alerts will not be sent when volunteers who do not have the selected Flag, Type or Kind remove themselves from the Assignment's schedule.

#### **Other options**

##### Never include this schedule on online volunteer application forms

If you use online volunteer application forms, you can optionally let new applicants indicate their schedule preference(s) when they apply. Check this box if you do not want schedule openings for this Assignment to appear on the application form.

##### Display volunteer schedule preferences for this assignment

If you collect online application forms that allow applicants to choose the schedule openings they want to serve in, you can optionally display their selections on the schedule for this Assignment as shown in help topic 2134 "Working with Schedule Preferences."

Check this option if you're still scheduling for this Assignment, and you want to see which volunteers have a preference for a schedule opening in this Assignment. You can then easily schedule volunteers based on their preference simply by clicking the *Add to schedule* link that appears on each schedule preference entry.

Leave this option un-checked if you do not want to see volunteer schedule preferences for this Assignment.

#### **Make this the default setup**

Click this button if you want all of the *new* Assignment records you add in the future to have the same Schedule Setup settings as the Assignment record you're working on. The current record's Schedule Setup will become the default for any Assignment records you add in the future.

Clicking this button *will not* change the Schedule Setup settings for any Assignment records you have already created.

This button will not appear if your organization uses Site Level Access and you are a Site-Level Operator. If your organization uses Site Level Access and you are not a Site Level Operator, clicking this button changes the default Schedule Setup settings for new Assignments created at **all** Sites.

#### **Related Help**

Help Topic 1180 - Scheduling Overview

Help Topic 2099 - Tracking Assignments

Help Topic 2170 - VIC Self-Scheduling

## **Sending All Volunteers Their VicNet Passwords in One Step**

Help topic 2233

Added or revised 04-27-2016

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You can send volunteers a link to set their VicNet password either individually, or to an entire group at once.

For example, if you're just getting started with VicNet, you may want to send all of your volunteers (or perhaps just all of your volunteers with the Active Status) the VicNet password link in a single step. Or, if you've just approved a new group of applicants, you may want to send the password link to all of the new applicants at once. This help topic describes how to do this.

Click on a section of the help topic in the *Contents* box below to jump directly to that section.

### **Contents**

Password Email Message

Tag the Records To Send VicNet Passwords To

Send the Password Email To the Tagged Volunteers

### **Password Email Message**

Volgistics has a template for the VicNet password email message. The same template is used for three purposes: 1) when the message is sent by a System Operator to volunteers, 2) when the message is sent by a System Operator to Coordinators, and 3) when the message is sent because volunteers or Coordinators request a password on the VicNet login page.

When the password email message is sent to a volunteer or Coordinator, the system automatically inserts the person's login name and the password link into the message. Here is how the default password email message appears for a volunteer with the email address of "greentree@hatmail.com."

Below is the password information you requested. Use the login name, and link to set your password, that appear below to access your information at the volunteer information center.

Your login name is: greentree@hatmail.com

Follow the URL to reset your password:

[https://www.volgistics.com/ex/core.dll/process?reset=%3DILM1rHHidoZ8c3\\*^D95oM5P4f](https://www.volgistics.com/ex/core.dll/process?reset=%3DILM1rHHidoZ8c3*^D95oM5P4f)

If you continue to have trouble accessing the volunteer information center with the credentials provided, please contact the volunteer office.

We recommend customizing the contents of the password email message to fit your organization's needs. For example, it is often useful to include instructions to the web page on your organization's website where you've placed the link to the VicNet portal.

Here is how you can customize this message for your account:

1. Select Setup from the menu.

2. Expand the *VicNet* link.
3. Select *Ground rules*.
4. Under *Password email*, enter what you want the email message to say.
5. Click the **Save** button after you are done customizing the password email's content.

Because the same email message is used for all three purposes mentioned at the beginning of this section, you will want to keep the message generic enough to apply to all three purposes while still educating the person on how to log-in. You can see a sample what you could enter as the message's content below:

Expire every  days

### Password email

Volunteers and Coordinators can receive a link to set their password by email. You can customize the content of this message below. Volgistics inserts the person's login name (email address), and the password link, between the Top and Bottom parts

Top part:

Thank you for serving at "My organization." You can find login information for the Volunteer Information Center (VicNet) below. Click on the link to set your password. After you have successfully set a password, you will be directed to the login page.

Bottom part:

To login to VicNet in the future:

1. Go to our website ([www.organization.org](http://www.organization.org))
2. Select the Volunteer page.
3. Click on the "Volunteer portal" link.
4. Enter your email address and password.

We appreciate your service! Please contact Jessica in Volunteer Services (555-444-3333) if you have trouble logging-in.

What should the subject line be for VicNet password emails?

Volunteer Information Center Password

**Heading**

Please keep in mind that the text fields for customizing your password email message will only take plain text. So if you do not place a link to the VicNet portal on your web site, and choose to give the URL address for the portal in your message, the URL address may not always appear as a clickable link when the volunteer or Coordinator receives the email. This will depend on how the recipient's email system treats URL addresses sent in plain text. To help with this, it may be beneficial to put text such as "If this does not appear as a clickable link, please copy and paste this address into your web browser" in your message.

### Password Message and Text Messaging

Please note that if your account has enabled text messaging and a volunteer has opted-in to text messaging, they will receive their password link by text as well as email. However, due to the limited length of text messages they will not receive the content of the message setup in the Password Email Message section of this help topic. They will only receive the password link in the text message.

## Tag the Records To Send VicNet Passwords To

You use the Tags feature to send VicNet passwords to multiple volunteers in a single step. There is not a way to tag Coordinator records so you will need to send passwords to them individually.

These instructions include an example of how to tag all of the volunteers with an Active Status. However, you can tag any group of volunteers you want to send VicNet passwords to. Help topic 2139 shows different ways you can tag groups of volunteer records.

To tag all of the volunteers with an Active Status:

1. Select *Volunteers* from the menu.
2. Under the Include section, click the *Clear* link (this clears any Include settings you may have previously set).
3. Under the Include section, select *Active* from the Status dropdown.
4. Click the *All* link near the top of the Volunteers page.

### 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](#)

A list of all records with the Active Status appears.

5. Click the **Tag** button in the top left corner. If more records are in your results than the page displays, a pop-up window will appear asking which records to tag. Select to tag all of the records.

All of your "Active" volunteer records are now tagged.

## Send the Password Message To the Tagged Volunteers

Now you're ready to send all of the tagged volunteers an email with a password link. If your account has enabled text messaging, and the volunteer has opted-in to text messaging, the password will be sent by text and email. However, the content of the message you setup in the Password Email Message section of this help topic will not be sent by text due to the limited number of characters text messages can contain.

1. Select Tags from the menu.
2. Click the **Go** button beside *Send a VicNet password link to the tagged volunteers*.

### Please Note

For security, the link in the password email only stays active for 24 hours after it is sent. If volunteers report they click the link and it says that it expired, simply ask them to click the *Forget your password?* or *Need a password?* link on the VicNet login page. This will send them a new link that they can use to get their password.



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# Delete Volunteer Records

Help topic 2309

Added or revised 12-11-2015

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If your Volgistics System Operator rights permit, you can delete volunteer records from Volgistics whenever necessary. You can click on a link in the *Contents* box below to go directly to a particular section of this help topic.

## Contents

Important Considerations Before Deleting Records

To Delete a Single Volunteer Record

To Delete Multiple Volunteer Records

Site-Level Operators and Deleting Records

Remove a Deleted Record Before the 5 Day Hold Period Ends

### Important Considerations Before Deleting Records

- **Deleted volunteer records can only be restored for 5 calendar days after they are deleted.** If 5 days pass and the record has not been restored, it will be permanently deleted from the system. There is not a way to "un-do" the deletion at this point. You can find information on how to restore a deleted record during the 5 day hold period in help topic 2311. *Please note that there is not a way to restore the schedule for a deleted record that has been restored.*
- There may be instances where you need to permanently delete a record before the 5 calendar day hold period ends. If you need to do this, see the Remove a Deleted Record Before the 5 Day Hold Period Ends section at the bottom of this help topic.
- Any service records associated with the record you delete are also deleted. This means that any volunteer service performed by the volunteer whose record you delete will no longer appear on any service reports, or in the cumulative hour total for your account. The service information not appearing on reports may not matter to you if the volunteer service associated with the record you delete has already been reported on prior year service reports, and you no longer need a record of their service detail. For example, if the record you're deleting only has service records through 2013, and you have already printed 2013 year end reports, deleting service entries from 2013 or earlier may not affect future reporting. However if the record you want to delete includes service records for the current fiscal or calendar year, you should not delete the record until after you print any year end service reports you need (consider archiving the record until then).
- If you want to remove a record from your database but you don't want to delete it, you can archive it instead. Volunteer service associated with archived volunteer records *will* always appear on service reports, and in the cumulative hour total for your account, even while the volunteer's record is in the archives. Help topic 1997 has more information on this.
- If you discover that you have two (or more) volunteer records for the same volunteer, you can use the **Combine** button on the Core tab to combine the records rather than deleting one of them. *Records deleted through combining cannot be restored.*

### To Delete a Single Volunteer Record

1. Choose *Volunteers* from the menu.
2. Locate the volunteer record you want to delete, and then open it to the Core tab.
3. Click the **Delete** button near the top of the Core tab.

## Thomas, Jill

The screenshot shows a user interface for a record titled "Thomas, Jill". At the top, there are several tabs: "Core", "Profile", "Service", "Schedule", "History", "Contacts", "Notes", and "Vic". A red arrow points to the "Delete" button in the "Service" tab. Below the tabs, there are buttons for "Save", "Cancel", "Archive", "Delete", and "Combine". To the right, there are buttons for "New", "Previous", and "Next". Below these buttons, there is a "Tagged" checkbox and a "Copy" icon. The "Name" section contains a "Last name" field with "Thomas" and a "Number" field with "305".

### Operator Rights and Deleting Records

If you do not see a **Delete** button on the Core tab, your Volgistics System Operator rights do not permit you to delete volunteer records. Your System Operator rights are set by your organization's Volgistics Administrator.

4. A dialog box will appear to confirm that you would like to delete the record. If the volunteer has VicDocs documents stored, the box will have an option to download the documents when you delete the record. When you choose this option, the volunteer's VicDocs will be placed in a zip file and sent to the In Box of your Volgistics mailbox. *You must save the zip file to your local computer within 5 days.* The document download is deleted automatically when the volunteer's record is permanently deleted.

5. If you'd like to proceed with deleting the record, click the **OK** button in the dialog box. Otherwise, click the **Cancel** button to close the dialog box without deleting the volunteer.

### To Delete Multiple Volunteer Records

You will use the Tags feature to delete multiple volunteer records. Because tags are cumulative during your session, we recommend **always** clearing your tags before deleting multiple records. This will reduce the chance that records are unintentionally deleted. To clear all records currently tagged for your session, select **Tags** from the menu and click the **Clear all tags** button. If the button appears grayed out, there are not any tagged records to clear.

To delete multiple volunteer records:

1. Tag the volunteer records you need to delete.
2. Select **Tags** from the menu.
3. Click the **Go** button beside **Delete the tagged volunteer records**.

The screenshot shows a dialog box with several options for managing tagged records. The options are:

- Change the **Status** of all tagged volunteer records to: [dropdown] [Go]
- Change the **Type** of all of the tagged volunteer records to: [dropdown] [Go]
- Add this **Flag** to all of the tagged volunteer records: [dropdown] [Go]
- Delete** the tagged volunteer records: [Go] (This option is highlighted with a red box)
- Archive** the tagged volunteer records: [Go]
- Reset and send the temporary **VicNet password message** to the tagged volunteer records:
  - Auto generate
  - Set as PIN
  - Set to: [text field][Go]

## Operator Rights and Deleting Records

If you do not see the **Delete the tagged volunteer records** option on the Tags menu, your Volgistics System Operator rights do not permit you to delete volunteer records. Your System Operator rights are set by your organization's Volgistics Administrator.

4. A dialog box will appear to confirm that you would like to delete the tagged records. If any of the tagged volunteers have VicDocs documents stored, the box will have an option to download the documents when you delete the record. When you choose this option, the volunteers' VicDocs will be placed in a zip file and sent to the In Box of your Volgistics mailbox. *You must save the zip file to your local computer within 5 days.* The document download is deleted automatically when the volunteer records are permanently deleted.

5. If you'd like to proceed with deleting the tagged records, click the **OK** button in the dialog box. Otherwise, click the **Cancel** button to close the dialog box without deleting the volunteers.

## Site-Level Operators and Deleting Records

*If you use the Site Level Access feature in your account, you should note how this affects volunteer record deletions.*

If a Site-Level Operator is allowed to delete volunteer records, and they choose to delete a volunteer record for a volunteer that serves *only* at their own Site, the volunteer record is deleted.

If a Site-Level Operator is allowed to delete volunteer records and they choose to delete a volunteer record for a volunteer that serves at multiple Sites, the volunteer record will no longer be associated with the Site where they have been deleted (and therefore appear to have been deleted from that Site's database). However, the record remains in the database and it is still accessible to Site-Level Operators from the other Site(s), as well as to headquarters level operators.

Headquarters level operators (operators with access to "All Sites") are not subject to these restrictions even if their account uses Site Level Access. When a headquarters level operator deletes a record, it is removed from the database regardless of what Site(s) the record is associated with.

## Remove a Deleted Record Before the 5 Day Hold Period Ends

You can permanently remove a volunteer record from the database before the end of the 5 calendar day hold period if needed. Please remember that there will *not* be a way to recover the record from the system if you do this. All information associated with the record (with the exception of the zip file of downloaded VicDocs documents) will be removed from the system.

The downloaded zip file of VicDocs will still be available for 5 days from the date the record was deleted even if you permanently delete the record before this time. If you wish to permanently delete the zip file before 5 days, follow the directions in the Deleting In Box Items section of help topic 1110.

To remove a record before the end of the 5 day hold period:

1. Choose Volunteers from the menu. The initial Volunteers screen appears.
2. If the Advanced Include options are not already displayed, click the **Advanced options** button.

volgistics™

**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

**Include**

Status: Any

Type: Any

Flag: Any

Site: Any

Set: Any

Tags: Any

Kind: Any

↑ Clear

**Advanced options**

3. Click the **Show deleted volunteers** button at the bottom of the page.

- Tagged
- Not tagged

**Kind**

- Any
- Individual
- Group

Archived volunteers

Basic options **Show deleted volunteers**

**Find**

Find from within all volunteer records.

Valid searches: exact phrase (such as **Volgistics**) or an \* (asterisk) at the beginning, middle, or end: **\*gistics** or **Vo\*stics** or **Volg\***.

Last Name:

4. Click the **Permanently Delete** button beside the record you need to remove now.

Name	Delete Date & Options	Group name
<input type="text" value="Search Name"/>	<input type="text" value="Search Delete Date &amp; Opt"/>	<input type="text" value="Search Group name"/>
Drury, Judith P	(12-07-2015) <input type="button" value="Restore"/> <input type="button" value="Permanently delete"/>	4565 Cer
Nowicki, Judith W	(12-07-2015) <input type="button" value="Restore"/> <input type="button" value="Permanently delete"/>	956 Shini
Scott, Mary J	(12-07-2015) <input type="button" value="Restore"/> <input type="button" value="Permanently delete"/>	4859 Wa
Thomas, Jill D	(12-07-2015) <input type="button" value="Restore"/> <input type="button" value="Permanently delete"/>	4138 Hill
Volgistics, Jeannette C	(12-07-2015) <input type="button" value="Restore"/> <input type="button" value="Permanently delete"/>	58 Michi

## Related help

Help Topic 2001 - Delete Archived Volunteer Records

Help Topic 2311 - How do I restore a deleted volunteer record?

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# How to Setup Volgistics - Basic

Help topic 2323

Added or revised 06-21-2013

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Volgistics includes a variety of setup and customization options you can use to adapt the system to best suit your own needs for tracking and coordinating volunteers.

This help topic includes a plan you can follow to initially setup the basic aspects of Volgistics for your organization. It lists each of the key setup tasks with links to other help topics that have instructions on how to complete each task. If you already have the basics of your account setup, you can view a help topic on setting up more advanced aspects by clicking the **Next** arrow.

## Contents

1. Complete the *Getting Started* Interview
2. Add System Operators
3. Customize Fields
4. Add Types and Flags
5. Add Statuses
6. Start and Stop Date Rules
7. Add Volunteer Records
8. Add Assignments
9. Add Roles
10. Add Roles to Volunteers
11. Build Schedules
12. Add Holidays

### **1. Complete the *Getting Started* Interview**

When you first start your Volgistics account, you complete a *Getting Started* interview online. Volgistics uses the answers to these questions to initially configure system setup options to best suit your organization's needs.

If you have already started your Volgistics account (or if someone else in your organization did), this step has already been completed and you can continue with the next step.

If you have not started a Volgistics account yet, you will have an opportunity to complete the *Getting Started* interview the first time you login to your account. Help topic 2060 explains more about the *Getting Started* interview.

You can change any of the setup options initially configured in the *Getting Started* interview as you learn more about Volgistics, or as your needs change. They are not "set in stone" so you don't need to worry about not being able to change your choices later.

If you've already completed the *Getting Started* interview, there is usually no need to complete it again. However, if you want to run the *Getting Started* interview again, you can clear your account and select to clear your account setup. Help topic 2112 explains how to do this. The first time you login after you clear your account you'll be asked to complete the *Getting Started* interview again. *Please remember if you choose to clear your account that any volunteer records or setup options you've already entered will be erased! So you should only clear your account if you want to erase all of your information and start from scratch.*

If you choose to clear your account so you can complete the Getting Started interview again, be sure to uncheck these options on the Clear Account page:

- Keep account setup
- Keep reports

### **IMPORTANT!**

If you are converting volunteer data into Volgistics from another program using the Import Utility, VolunteerWorks, or the Jump-Start service, do not proceed beyond this point until your data conversion is complete.

The data conversion process may set some options to match your existing data. The data conversion may also insert Assignments, Checklist item names, and Award names from your old data. Therefore you should not setup your account until after the data conversion is finished.

You can learn more about data conversion options in Help topic 2299, or by visiting [www.volgistics.com](http://www.volgistics.com), hovering over Support on the menu at the top of the page, and selecting Conversions.

## **2. Add System Operators**

Volgistics System Operators are the people in your organization who you want to be able to use Volgistics. Volgistics is a multi-user system. This means different people in your organization can use the system at the same time as long as they have each been setup as a separate System Operator.

Every Volgistics account starts with space for two System Operators. You can create additional System Operators beyond two if your account's service level permits. See Help topic 2166 if you want to add more System Operators than you currently have space for. You create your first System Operator record during the sign-up process when you start a free trial account.

If you want to add additional System Operators to your account now, follow the step-by-step instructions in Help topic 2026.

You can always add more System Operators, or change your System Operator profiles later, if you want to complete the account setup before giving other people access.

## **3. Customize Fields**

Volgistics allows you to customize many of the fields in your account. In most cases you can change the name of the field and hide it if you will not need it. In some cases you can also change the formatting required for the field. The exception to this is system fields that cannot be changed.

There are also spare fields that can be setup for your organization's needs. These fields are located in the following locations:

### Profile tab on volunteer records

- 6 Spare Dropdown
- 6 Spare Fields\*
- 6 Spare Checkbox

There are also Characteristic fields that can be created.

Service tab on volunteer records

1 Spare Date  
1 Spare Dropdown  
1 Spare Checkbox

History tab on volunteer records

1 Spare Date  
1 Spare Dropdown  
1 Spare Checkbox  
1 Spare Text

Contacts tab on volunteer records

1 Spare Date  
1 Spare Text

Site tab on a Site record

6 Spare Dropdown  
6 Spare Fields\*  
6 Spare Checkbox

Place tab on a Place record

6 Spare Dropdown  
6 Spare Fields\*  
6 Spare Checkbox

Assignment tab on an Assignment record

6 Spare Dropdown  
6 Spare Fields\*  
6 Spare Checkbox

Coordinator tab on a Coordinator record

1 Spare Dropdown  
2 Spare Date

Assignments tab on a Coordinator record

1 Spare Dropdown  
1 Spare Checkbox  
1 Spare Date

\*These fields can be given text, date, whole number, decimal (1 or 2 places), currency, or social security number format.

You can find a listing of all the fields available in Volgistics in Help topic 1174. You can find directions and more information on how to customize fields in Help topic 2017.

## Important things to consider when customizing fields

1. If you used one of the conversion methods (Import Utility, VolunteerWorks, or Jump-Start) to move volunteer and other information into Volgistics, you may find that some of the spare fields have been created for you already. In this case, you can edit the fields if they do not appear as you'd like. If the field is a dropdown list, or look-up table, Help topic 2018 has information on how to edit the field.

2. If you're using the spare fields on the Profile tab of volunteer records to collect information from an application form, there is not a way to set the order the fields appear in within each section of the form. The order the fields appear in is determined by the type of field first (dropdown, general, checkbox) and then by the order the fields were created in. For example, if you create the following fields with the following names:

Association member (spare checkbox 1)

Ethnicity (spare dropdown 2)

Gender (spare dropdown 3)

Other last names (spare field 2)

Parking permit number (spare field 1)

Referral source (spare dropdown 1)

These fields would appear in the following order if they were all included on the same section of the application form:

Referral source (spare dropdown 1)

Ethnicity (spare dropdown 2)

Gender (spare dropdown 3)

Parking permit number (spare field 1)

Other last names (spare field 2)

Association member (spare checkbox 1)

If controlling the field order is important on your application form, you should make sure you create the fields with the order you want them to appear within application form sections in mind.

3. If the spare fields offered on the Profile tab of volunteer records are not sufficient, you may be able to use the Characteristic and/or Preference fields on this tab to collect additional information.

## 4. Add Types and Flags

Types and Flags offer ways to categorize volunteer records in Volgistics. You can use them to control how you view volunteer records, run reports, apply Checklist and awards, send email messages, and other things. You may have setup some Types and Flags in your account during the Getting Started interview.

If you want to delete, add, or make new Types or Flags now, please see Help topic 2263.

## 5. Add Statuses

Volgistics tracks a volunteer's overall relationship with your organization by using the Status field. Each account can have up to eight different Status categories. By default, the categories are setup as Active, Applicant, Inactive and Prospect. All of these except the Active Status can be modified to be something else.

You can add, delete, modify, or setup a default Status for new records. Help topic 2014 has information on how to do this.

## 6. Start and Stop Date Rules



By default, Volgistics records a volunteer's Start date as the first date they have an Active Status and their Stop date as the first date they have an Inactive Status. You can learn more about this in help topic 2315.

You can modify the rules used to determine a volunteer's Start and Stop dates to be based on different and/or additional Statuses. Help topic 2314 shows how to do this.

## 7. Add Volunteer Records

If you used one of the conversion methods discussed in the Getting Started section of this help topic, you may already have volunteer records in your account. If you didn't use a conversion method, or you need to add additional records, Help topic 2298 shows how to manually enter records in your account.

Please note, in some cases (such as special events), you may want to use application forms to enter volunteers. In this case, you can skip this step and add volunteer records later.

## 8. Add Assignments

The next step is to begin adding the names of your volunteer *Assignments* to the system. Assignments are what your volunteers do for your organization. Every organization that has volunteers has at least one volunteer Assignment (or else your volunteers would have nothing to do!).

Assignment information is a key part of your database. Your Assignment list makes it possible for you to keep track of which Assignments volunteers are qualified to perform, which they are interested in or scheduled for, and so forth. It will enable you to print volunteer service reports broken-out by assignment, and view lists of volunteers according to Assignment.

At this point all you need for each Assignment you want to track is an Assignment *name*. Below are some examples of volunteer Assignment names taken from a variety of different kinds of organizations. Of course these are only examples. You should use your own Assignment names, which may be whatever you'd like (up to 72 characters long).

Assignment names can be changed later so you don't need to worry if you're unsure of what to call an Assignment.

Docent	Book cart	Driver
Ticket taker	Usher	Records
Exhibit explainer	Phone bank	Public speaker
Donor recruiter	Receptionist	Tutor
Math tutor, 6-12	Trail maintenance	Circulation desk
Reading room	Client advocate	Ambassador
Greeter	Tour guide	Gift shop cashier
Radiology	Campaign phone bank	EMT
Emergency response trainer	Counselor	Hot line counselor
Water station	Front desk	Curb greeter
Legal advocate	Waiting room	Office assistant

In addition to storing the name of each Assignment, Volgistics can also help you organize, publish, and track other kinds of Assignment information too. For example, you can also enter things such as a job description, age requirement, the location where the Assignment is performed, the supervisor's name and contact information, and more. You can enter this additional information now as you're getting started, or you can return to each Assignment record later to add additional Assignment information.

Follow the step-by-step instructions in Help topic 2215 to learn how to add an Assignment record.

You can enter your volunteer Assignments under one or more Sites and Places. This gives you a way to organize your Assignments according to geographic, program, or department divisions your organization might have. Help topic 2099 explains more about this capability.

If you're not sure if you need to organize your Assignment list according to any kind of geographic, program, or departmental structure (or if you don't know what that structure is), you can simply add your new Assignments to the default *Volunteer Services* Place. If you choose to, you can easily reorganize your Assignment list according to Places (or Sites and Places) later.

If you converted data from another program, some (or all) of your Assignments may already be in Volgistics. You can find out if your database already has any Assignments entered by choosing Assignments from the menu.

It's okay if you don't enter all of your Assignments right now. You can always add more Assignments later as you go.

## **9. Add Roles**

Volgistics uses Roles as a way to show a volunteer's relationship to an Assignment. The default Roles are Assigned, Former, Preference, Substitute and Trainee. One volunteer can have multiple Roles in an Assignment. For example, a volunteer may regularly serve in an Assignment, plus be available as a substitute. So this volunteer could have Roles of Assigned and Substitute in the same Assignment.

You can customize the Roles used to relate volunteers to Assignments, and learn more about how this feature works, in help topic 2173.

## **10. Add Roles to Volunteers**

If you converted data from another program, some of your volunteer records may already have Roles recorded for Assignments. If not, and you know that some of your volunteers will serve in, or prefer, certain Assignments, you can give them a Role in these Assignments now. Help topic 2399 shows how to do this. If you're unsure of which Assignments volunteers should have Roles in, these can always be assigned later.

You may also want to setup your account to automatically give volunteers a Role of Assigned in an Assignment if they are scheduled for, or have service hours recorded for, the Assignment. Help topic 2265 shows how to set this up. Using automatic Assignment tracking can eliminate the need to assign volunteers a Role in Assignments now if you will schedule them later.

## **11. Build Schedules**

In most organizations, volunteer schedules can be built in two different ways. There are Assignments such as *Trail Maintenance* or *Kennel Cleaner* where volunteers come in to complete a task that does not need to be performed at a specific time of day. Volgistics refers to these Assignments as "any time" Assignments. There are also Assignments such as *Tour Guide* or *Circulation Desk* where coverage is needed during specific shifts on specific days of the week. Volgistics refers to these Assignments as "openings only" Assignments. Your organization may have one, or both, of these types of Assignments.

For "any time" Assignments, you will schedule volunteers (or volunteers will schedule themselves) once your account setup is complete. So there is not much to do for these Assignments at this point. However, for "openings only" Assignments you may want to setup the shifts, or times, volunteers are needed now. Help topic 2158 shows how to do this. Of course, if you're unsure of when your volunteers will be needed, you can always add (or modify) Assignment openings later.

Regardless of whether your Assignments are "any time" or "openings only" Assignments, you should also review help topic 1180 to get an overview of how the scheduling features work in Volgistics. This help topic also has links to other help topics to help you setup the ground rules for scheduling in your account.

## **12. Add Holidays**

Your organization may have days when volunteers are not needed, or you operate with just a skeleton staff of volunteers. In this case, you can mark these days as holidays in your account. Doing this will remove any regularly scheduled volunteers, and recurring unfilled openings, from your schedule on these days. If you still need volunteers to come in, you can schedule them specifically for that date or create one day only openings on the date. Help topic 1022 explains more about how this feature works and how to setup the holiday dates.

Depending on how much of the year has passed, you may want to setup the holidays in your account for the remainder of the present year and/or for the following year at this time. You can always mark your office calendar, or set a reminder, to update holidays for the future years during the time of year that works best for you.

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## **Service Tracking Ground Rules Setup Page**

Help topic 2488

Added or revised 10-07-2016

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Setup\Service tracking

You can use the Service Tracking Ground Rules Setup page to configure the basic service tracking operations for your account. To get to the Service Tracking Ground Rules page, choose Setup from the menu, click on Service tracking, and then choose Ground rules.

### **Hour entry display format**

Hours:minutes (e.g. 123:30)

Choose this option to display hour values in Volgistics in the hours:minutes format.

Decimal (e.g. 123.5)

Choose this option to display hours values in Volgistics in the decimal format.

### **Manual volunteer service entries**

If you post volunteer service information manually in Volgistics, there are several options pertaining to the display of this service information.

Choose one of the following options for posting volunteer service manually

*We always make manual service entries for one month at a time.*

This option will allow you to enter a total number of hours in one lump sum for the entire month, as shown below.

**Add**

Assignment:

Month:

Apply to:


Hours:

*We always make manual service entries for one day at a time, and we do NOT want to enter the volunteer's start and stop times.*

When this option is chosen, service entries will have room for one date and a number of hours and minutes, as seen below.

**Add**

Assignment:

Date:  

Apply to:


Hours:

*We always make manual service entries for one day at a time, and we DO want to enter the volunteer's start and stop times.*

Choosing this option will allow you to enter a specific date and the times a volunteer began and ended their service. The "Hours" field will be filled in automatically once the "From" and "To" times have been entered.

**Add**

Assignment:

Date:   From time:

To time:

Apply to:


Hours:


*We want to make manual service entries with a beginning and an ending date, and we do NOT want to enter the volunteer's start and stop times.*

Choosing this option will permit service entries with a lump sum of hours that span multiple days.

### Add

Assignment:

From date:  

To date:  

Apply to:


Hours:


We want to make manual service entries with a beginning and an ending date, and we DO want to enter the volunteer's start and stop times.

Finally, choose this option if you would like your service entries to include multiple days and list the "To" and "From" times for the service. This option is particularly useful when recording service performed overnight.

### Add

Assignment:

From date:   From time:

To date:   To time:

Apply to:

Hours:

### Full time equivalent

Use this section to enter the number of hours that should be considered a full time equivalent in Volgistics reports.

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## Volgistics A - Z: A Glossary of Volgistics Terminology

Help topic 2500

Added or revised 11-18-2016

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Volgistics uses specific terminology regarding the different aspects of your account. It can sometimes be confusing if you do not know what the terms mean. This help topic defines each term and can be a helpful resource when you are using the system.

You can click a letter in the *Index* box to go directly to a section of this help topic.

### Index

**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**

**Account** - When the Volgistics team refers to an *account* they mean the entire database of records for your organization. Each Volgistics account has only a single account number and service level. The support team often gets help inquiries where *account* is used to refer to different things in the system such as volunteer, Coordinator, or System Operator records. Or sometimes even the Site, Place, or Assignment records. Volgistics generally refers to these items by name instead of as an *account*.

**Accounting Access Code** - This code allows people who are not setup as System Operators (or System Operators who have the Basic User or Power User operator levels) to gain access to the Volgistics Store for your account. You can find more information here.

**Accounting Operator** - This term is used to describe any person who can access the Volgistics Store for your account using the Accounting Access Code. This person may, or may not, be the Billing Contact on file for your account. The Accounting Operator does not count as a System Operator in your account's service level.

**Active Status** - This is a default Status in Volgistics that cannot be modified. The Active Status is generally used to describe a volunteer who has completed the induction process to volunteer with your organization and is now contributing. Please see Status in this glossary for more information.

**Activity** - Please see Assignment in this glossary for more information.

**Address Label Reports** - These reports make PDF files that put names and addresses for volunteers, contacts for volunteers, and/or Coordinators in common formats for sheet fed laser or ink jet printer labels. You can find more information here.

**Administrator** - Also referred to as *Volgistics Administrator*. Please see Volgistics Administrator in this glossary for more information.

**Alerts** - Notifications sent to System Operators or Coordinators when events occur such as receiving an application, self-scheduling, or email opt-outs by a volunteer.

**Anniversary Cards** - Please see Greeting Cards in this glossary for more information.

**Any Times** - A term used to describe Assignments or schedule entries that do not require volunteers to serve specific times. You can setup the Rules tab of an Assignment to allow self-scheduling for *any times* in Assignments that do not require volunteers to serve a certain shift. Please see Schedule in this glossary for more information.

**Applicant Status** - A default Status in Volgistics generally used to describe people who have begun the process of becoming a volunteer by filling out an application form. Please see Status in this glossary for more information.

**Application Forms** - Online forms people interested in serving with your organization can complete. Information from these forms is automatically used to create volunteer records in your account. You can find more information here.

**Applications Tab** - A tab in the Volgistics mailbox used to receive new application forms and records converted (imported) into your account. You can learn more about how to receive records from the Applications tab here.

**Archive** - A section of your database used to store inactive, or un-needed, volunteer records, or the act of sending these records to the archived section. Please note this is separate from Status. Archived and non-archived records can have any Status in your account regardless of the section they are in. Because archived records have more limited functionality than non-archived records, they cost less on a record-by-record basis. You can find more information here.

**Assigned Role** - Roles in Volgistics are used to show the volunteer's relationship, or standing, in a specific Assignment. The Assigned Role is a default Role generally used to show that the volunteer is currently serving in the Assignment. Please see Role in this glossary for more information.

**Assignment** - The task, or work, the volunteers actually perform at your organization. Some organizations may refer to these as *events, jobs, opportunities, work area, projects, or positions*. Creating Assignments is important because it gives you more options for scheduling and recording service. You can find more information here.

**Assignment Cluster** - A Volgistics feature that allows you to group or organize similar Assignments together even if they are not listed under the same Site or Place in the account's Site, Place, and Assignment hierarchy. When this feature is enabled, many reports can be organized by Cluster. You can learn more about how to enable this feature here.

**Assignment Preference Field** - A preference field that applicants and volunteers can use to express that they are interested in serving in an assignment. You can learn more about setting up this field here. You can learn more about using this field on application forms here.

**Assignment Profile Reports** - These reports create PDF files with information about Assignments in your account. You can find more information [here](#).

**Attachment** - A PDF or Microsoft Word document that is sent out with an email message. You can find more information [here](#).

**Audit** - Each account's Administrator(s) can configure the account so that System Operators can review service records for accuracy. You can find information on how this works [here](#).

**Automatic Messages** - Email or text messages automatically sent to volunteers and Coordinators by Volgistics. These can include schedule reminders, Checklist reminders, password messages, or self-scheduling alerts.

**Automatic Payment** - A payment option for paying your Volgistics service fee with automatic monthly payments charged to your credit card. You can find more information [here](#).

**Awards** - A recognition program for tracking volunteer milestones such as a certain number of years or hours served. You can also setup recognition for things not based on a milestone, such as a *Volunteer of the Month* award. You can find more information [here](#).

**Awards Reports** - Stock reports designed to help you manage your Award program. You can find more information [here](#).

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**Back-up** - Storing data for future reference. Volgistics does a system-wide back-up of all accounts nightly, but these can only be used to restore the entire system in the case of a catastrophic emergency. You may also want to make a local back-up of your volunteer information using an Excel report. You can find more information [here](#).

**Basic User** - A user level that controls the amount of access the System Operator has in the account. To customize the access, Administrators setup the Field Rights and Tab Rights for the Basic User operators.

**Batch Reports** - A report listing all service entries in a batch of service recorded with the Post feature. You can see an example of this report [here](#) and find more information about the report [here](#).

**Billing Contact** - The person you select to receive automatic email messages concerning your account's status. This person may be the account's Administrator or another System Operator. Or it may be a person from a department in your organization that handles payments. You can find information on how to update the email address on file for the billing contact [here](#).

**Birthday Cards** - Please see Greeting Cards in this glossary for more information.

**Birthday List** - You can setup Volgistics to display a list of volunteers who have upcoming or recent birthdays on the Welcome page that System Operators see when they login. The list can be configured to update automatically on a daily, weekly, or monthly basis. You can find more information [here](#).

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**Calendar Year** - The standard calendar year running from January 1st to December 31st. Your reports for volunteer service can be organized by calendar year, or fiscal year.

**Cards** - Please see Greeting Cards in this glossary for more information.

**Characteristic Field** - These customizable fields provide checkboxes for collecting information about your volunteers. They are ideal for recording things such as skills, interests, languages spoken, memberships, certifications, and more. You can find more information [here](#).

**Checklist Item** - Checklists provide a tool for tracking the completion of actions volunteers must fulfill in order to serve. They can be one time requirements (such as reference checks, orientations, or confidentiality agreements) or recurring requirements (such as flu shots or background checks). You can find more information [here](#).

**Checklist Reminders** - Automatic messages that are sent to volunteers to let them know that a recurring Checklist item is due.

**Cluster** - See Assignment Cluster for information.

**Comment Fields** - A field that can be added to volunteer application forms to collect narrative information. When the application form creates the volunteer's record, information entered in the Comment field is directed to the Notes tab of the record. You can find more information on how to add Comment fields to application forms [here](#).

**Contacts** - The information for a volunteer's or group's contacts found on the Contacts tab of their record. Typical contacts include Emergency Contacts, References, and Employers. Other kinds of contacts can be customized. Contact fields can also be added to application forms. You can find more information on how to do this here.

**Contacts Tab** - A tab on the volunteer record where the Contacts for the record are stored. You can find more information on volunteer record organization here.

**Conversion** - The process of importing, or transferring, volunteer information from a previous database or file into your Volgistics account. You can find more information about the options for creating volunteer records here.

**Coordinator** - A Volgistics user who can access basic volunteer information and schedules through the VicNet module. These users do not have the same degree of access to the account as System Operators. Many organizations refer to their volunteer department's leaders as *coordinators*; however, these people may have *System Operator* records in your account. You can find more information about Coordinator records here.

**Core Tab**- This is a tab on the volunteer record where the basic information for the volunteer or group is stored. You can find more information on the Core tab here.

**Count** - The number of records in your account. You can find totals for the number of records used by selecting Setup from the menu, expanding the *Account management* link, and selecting *Account status*. You can also find numbers for volunteers with just certain characteristics. You can find more information on how to do this here. If you want to find the number of volunteers with service during a certain time period, use the Unduplicated Volunteer Count.

**Credentials** - The information used by a System Operator to access Volgistics. This includes their account number, plus the email address and password on file for them on their System Operator record. You can find more information about how to use credentials to login here.

**Custom Reports** - Volgistics contains Stock Reports that are pre-made reports designed to meet a variety of common volunteer tracking needs. You can also create *custom reports* where you select the organization, format, and fields for the report. You can find more information on creating custom reports here.

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**Daily Availability** - A field used to track when volunteers are available to serve as well as when volunteers are needed for an assignment. This field appears on the Profile tab of volunteer and assignment records.

**Date Entered** - The date a volunteer record was added to your database. This date is recorded on the History tab of the volunteer record and is available in Sets and reports. You can find information on how records are added to your database here.

**Date of Last Activity (DOLA)** - Date of Last Activity is sometimes abbreviated as DOLA. The Date of Last Activity is the date of the last service entry made on a volunteer record. This date appears in the Statistics box on the volunteer record and is available in Sets and reports. You can find more information here.

**Department** - Volgistics does not have a term, or item, called *department*; however, many accounts use this term to refer to a Site, Place, or Assignment in their account's assignment structure. You can find more information here.

**Display Graphic** - This is an image uploaded to Volgistics so that it appears on the online forms used in your account. Please see Logo Graphic in this glossary for more information.

**Docs Tab** - This is a tab on records for electronic document storage. The Docs tab always appears on volunteer records (learn more here). If the VicDocs module is included in your account's service level, there will also be a Docs tab on Coordinator records (learn more here) as well as Site, Place, and Assignment records (learn more here).

**Documents Tab** - A tab on the Volgistics Mailbox designed to help you manage your documents. The Documents tab will always have sub-tabs for attachment and volunteer documents. If the VicDocs module is included in your account's service level, there will also be sub-tabs for Coordinator, Site, Place, and Assignment documents. You can learn more about the Documents tab here.

**DOLA** - Please see Date of Last Activity (DOLA) in this glossary for information.

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**Email Messages** - Communication sent to your volunteers and/or Coordinators via email. You can find more information on how to send email messages here.

**Email Codes** - Codes that can be inserted into the body of your email message to personalize the message with your volunteer's information. You can find more information here.

**Email Opt-out** - Please see Opt-out in this glossary for information.

**Email Preferences** - Part of the Opt-out feature that allows volunteers and Coordinators to select the types of email messages they wish to receive. You can find more information here.

**Email Types** - Categories of email messages volunteers use to select their Email Preferences. You can find more information here.

**Event** - Volgistics does not use the term *event* for anything but the actions, or tasks, a System Operator performs. However, many organizations use the term *event* to refer to a function where their volunteers will serve, or to the actual jobs or tasks the volunteers will perform at the event. In Volgistics, you will typically use Site or Place records for the overall event, and Assignment records for the jobs or tasks volunteers perform at the event.

**Event Log** - The Event Log is a record of key actions for your account. Quite often these are related to actions performed by a System Operator, but they can also be events the system initiates. Only key actions are tracked because logging every single action is not practical due to the additional processing and storage requirements this would introduce. You can find more information here.

**Excel** - A Microsoft application used for spreadsheet data. Volgistics does not supply the Excel program, but it can produce reports in Excel format. You can find more information in the Excel Spreadsheet Report entry.

**Excel Spreadsheet Reports** - Reports produced by Volgistics in spreadsheet format using the Excel file extension (.xlsx). There is a specific Excel report type here, and many other stock and custom reports can also be produced in Excel format.

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**Field Rights** - Administrator(s) can restrict System Operator access to certain fields according to the operator's User Level. Fields can be hidden from view for a user level, or set to *View only* so the user can see the information but not change it. You can find more information here. You may also want to see Tab Rights in this glossary for more information.

**Fields** - Fields in Volgistics refer to locations where you can store information. Fields can have different types or formats such as text, date, dropdown list, or checkbox. You can find more information about the fields available in Volgistics here.

**Fill Link** - The Fill link is a link that appears beside an unfilled opening on your account's schedule. Clicking this link opens the *Fill an opening* box so that you can schedule a volunteer to fill the opening slot. Please see Opening in this glossary for more information on schedule openings.

**Filled Opening** - A filled opening slot means a volunteer is scheduled to serve in the shift that the opening represents. Please note that one opening can have multiple slots (for instance if 5 volunteers are needed for the shift). So even if a volunteer is filling one of the slots, there may still be unfilled opening slots available for the same opening. You can use the schedule icons as a visual indicator to see if an opening slot is filled or unfilled.

**Fiscal Year** - A 12-month period used to calculate annual financial statements. This is sometimes also called a *financial year* or *budget year*. You can setup Volgistics to figure year-to-date (YTD) totals and reports based on your organization's fiscal year. You can find more information on this here.

**Flags** - Flags provide a way to identify and categorize volunteer records. Flags differ from Types because a volunteer can have multiple Flags but only one Type. You can find more information here.

**Floating Subtotal** - Two customizable floating subtotal fields are available to help you track service over a certain range of months. The floating subtotal fields are available on most reports and in the Statistics box on the Core tab of the volunteer record. You can find more information here.

**Former Role** - Roles in Volgistics are used to show the volunteer's relationship, or standing, in a specific Assignment. The Former Role is a default Role generally used to show that the volunteer previously served in an Assignment, but is not serving in the Assignment at the current time. Please see Role in this glossary for more information.

**Frequency** - The *Frequency* field is a field that is used for schedule entries to show how often the entry will occur. It can be set to One time for assignments that will take place on just one date, or Regular if the entry will repeat on certain weekdays.

**FTE** - Please see Full-Time Equivalent (FTE) in this glossary for information.

**Full-Time Equivalent (FTE)** - Full-time equivalent (FTE) refers to a unit used to indicate a workload, or count, for hourly resources. Volgistics can assist volunteer leaders by calculating a FTE for volunteer service. You can find more information here.

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**Getting Started Interview** - The *Getting Started Interview* takes place the first time someone logs-in to a new trial account. It is used to setup some basic options for the account, which can be changed later if necessary.

You can find more information on what the interview covers here.

**Graphic** - In software, this generally refers to a picture or image file. There are two locations in Volgistics where graphic files can be used. Please see Logo Graphic and Vic Graphic in this glossary for more information.

**Greeting Cards** - Birthday, start date anniversary, and holiday cards that can be setup to appear when volunteers sign-in to the VicTouch module. You can find more information here.

**Group** - Volunteer records designed to be used when you have a group of volunteers (such as a school service group, or a group of volunteers from a business or social club). Group records are designed to be used when you do not need to track service, contact, and other information for each individual that serves as part of the group. You can find more information here.

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**Headquarters Operator** - When an account has the Site Level Access feature enabled, a *headquarters operator* is an operator assigned to all Sites instead of one particular Site.

**Help E-mail Tab** - A tab in the Volgistics Mailbox used to submit and receive help inquiries.

**Help Inquiry** - Volgistics offers free, unlimited online support. A *help inquiry* refers to a question that has been submitted to our support team. You can find information on the recommended method of submitting questions from your Volgistics account here.

**History Tab** - This is a tab on the volunteer record where date records and the message history for the volunteer are stored. Date records are kept for things like when a Status was given, when a Checklist item was completed, or when an Award was received. The message history tracks when messages were sent to the volunteer as shown here. You can find more information about the tab structure of volunteer records here.

**Holiday Cards** - Please see Greeting Cards in this glossary for information.

**Holidays** - If your organization closes or keeps a reduced staff on certain days, you can clear the ongoing schedule for the date by using the *Holidays* feature. You can find more information on how this works here.

**Hours** - Please see Service Entry in this glossary for information.

**Hours of Operation** - The opening and closing times for when you will use volunteers. The *Hours of Operation* control the beginning and ending times for when volunteers can be scheduled. You can find more information here.

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**Import** - Please see Conversion in this glossary for information.

**In Box Tab** - A tab in the Volgistics Mailbox used to receive Reports and Alerts. You can find more information on the In Box tab here.

**Inactive Status** - A default Status in Volgistics generally used to describe people who are no longer volunteering with your organization. Please see Status in this glossary for more information.

**Include** - *Include* refers to selecting which volunteers appear on a list, report or tab. Two spots where Include settings appear are the Volunteers Page, and the Volunteers Tab. In addition, each report has an Include tab that controls which volunteers appear on the report. You can learn more about the Include tab on reports here.

**Individual** - Individual records in Volgistics represent one volunteer. You can learn more about the tabs and information that can be stored on records here. Volgistics also offers group records. Please see Group in this glossary for more information on group records.

**Invoice** - Please see Order-Invoice in this glossary for information.

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**Job(s)** - Please see Assignment in this glossary for information.

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**Kiosk** - *Kiosk* can refer to the furniture or structure used to hold a computer. In Volgistics, we generally use the term *kiosk* to refer to your account's VicTouch Sign-in Station.

**Kiosk Mode** - A method of launching the VicTouch module that causes the display to fill the entire monitor or screen. This gives the most secure and reliable experience because it removes the web browser controls from view so only people with a special code can shut down VicTouch. You can learn more about how to configure your web browser to launch VicTouch in kiosk mode here.

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**Labels Reports** - Volgistics has reports designed to produce PDF files that can be used with sheet fed labels such as file labels. You can find more information here.

**Leave of Absence Status** - Please see LOA Status in this glossary for information.

**Life Hours** - The grand total of all service hours entered for a volunteer. This figure is available on the volunteer's Service tab, and can be added to the Statistics box on the Core tab of the volunteer's record. The figure is also available on the Fields tab of most reports, and can be used as a benchmark when configuring Volgistics to determine who is available for awards.

**LOA Status** - A custom Status Administrator(s) can create in the Volgistics account. It is generally used to describe people who are on a Leave of Absence (LOA) from volunteering, but will likely return to an Active Status. Please see Status in this glossary for more information.

**Local Back-up** - Please see Back-up in this glossary for information.

**Login** - Entering your credentials and starting a Volgistics session. The account's System Operators can find more information here. Volunteers and Coordinators can find more information by watching the training videos at [www.volgistics.com/volunteer-training-videos](http://www.volgistics.com/volunteer-training-videos)

**Logo Graphic** - Image files uploaded to your account that contain your organization's logo. Separate graphics can be uploaded for your Display Graphic, Print Graphic, and Mobile VicNet Graphic. You can find more information on uploading graphics here. Your account may also have Vic Graphics. Please see Vic Graphic in this glossary for more information.

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**Mail Merge** - Using a source document that contains information such as volunteer names, addresses, etc. to copy this information into a template letter, or other document. The mail merge is performed using word processing or similar software to individualize each copy of the finished document with the information from the source document. You can find information on making a source document in Volgistics here. Volgistics also allows you to personalize email messages with email codes.

**Mailbox** - The communications center in Volgistics. The mailbox view is the same for all System Operators unless an account has Site Level Access enabled. In this case, operators only see information for their Site. The mailbox has In Box, Out Box, Applications, Service, Help E-mail, and Documents tabs.

**Mandate** - See Mandatory Service in this glossary for information.

**Mandatory Service** - A goal for volunteers to perform a certain amount of service for your organization within a specified date range. You can find more information here.

**Menu** - The items along the left side of your Volgistics account that direct you to certain areas of the program. You can find more information here.

**Merit Hours** - A way to adjust service hours recorded for volunteers automatically. Regular hours can be augmented for situations such as serving on a weekend, taking an overnight shift, or serving in a hard to staff Assignment. Or regular hours can be decreased to account for lunches or breaks. You can find more information here.

**Mobile VicNet Logo** - This is an image uploaded to Volgistics so that it appears on the mobile friendly view of VicNet. Please see Logo Graphic in this glossary for more information.

**Month-to-date (MTD)** - The month-to-date (MTD) total is the sum of all service hours entered for a volunteer from the first of the month to the current date in the month. For example, if it is March 22nd, the figure will represent a sum of service entries from March 1st to March 22nd for the volunteer. This figure can be added to the Statistics box on the Core tab of the volunteer's record, and is available on the Fields tab of most reports.

**MTD** - Please see Month-to-date (MTD) in this glossary for information.

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**Non-Archived** - A section of your database used to store volunteer records for your volunteers who are actively serving. Please note this is separate from a volunteer's Status. Non-archived and archived records can have any Status in your account regardless of the section of your database they are in. You can find more information on the differences between non-archived and archived records here.

**Notes Tab** - A tab on the volunteer record where you can add narrative text information about the volunteer. Information from Comment Fields on volunteer application forms is placed on the Notes tab. You can find more information on the Notes tab here.

**Notifications** - Please see Alerts in this glossary for information.

**Number** - A unique identification number found on the Core tab of the volunteer record. This number is used as the PIN when volunteers sign-in to the VicTouch module. If you'd like to send volunteers their PIN in an email message, you can do this with an email code. You can find more information about system settings for volunteer numbers here.

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**On-Demand** - In Volgistics, *On-Demand* refers to schedule reminder messages that are sent because a System Operator triggered the action. In most cases, schedule reminders are sent automatically by the system. You can find more information regarding On-Demand reminder messages here.

**One Day Only** - This refers to an opening or schedule entry that only takes place on one, specific date. It does not repeat on an ongoing basis. Please see Schedule in this glossary for more information.

**Ongoing** - This refers to an opening or schedule entry that takes place on a recurring, or repeated, basis. For example, a schedule entry that takes place on every Monday and Wednesday is said to take place on an *ongoing* basis. Please see Schedule in this glossary for more information.

**Online Forms** - Volgistics features that allow volunteers and potential volunteers to interact with your organization via the Internet. These include the Opportunity Directory, application forms, and the VicNet module.

**Opening** - Openings are used to create shifts, or pre-set times, when volunteers will serve. Openings can be setup to take place on just one specific date. Or, they can be setup to recur on an ongoing basis. One opening can be setup to take place on multiple days and require multiple volunteers. For example, a single opening may take place every Monday, Wednesday and Friday and have 5 slots, or volunteers needed, on each of those days. You can find more information on creating openings here.

**Openings Only** - A term used to describe Assignments or schedule entries that require volunteers to serve specific times. You can setup the Rules tab of an Assignment to allow self-scheduling for *openings only* in Assignments that require volunteers to serve a certain shift. Please see Schedule in this glossary for more information.

**Opportunity** - Please see Assignment in this glossary for information.

**Opportunity Directory** - An online form that lists your Assignments and descriptions. You can find more information on this here.

**Opt-out** - To ensure the integrity of Volgistics email messages, we require that opt-out choices be sent with all email messages sent to more than one volunteer or Coordinator. You can find information on why this is important here. The recipient selects what email types they would like to receive. These choices are used to setup the volunteer or Coordinator's email preferences.

**Order-Invoice** - A bill used with the pre-payment method to start the payment process. Volgistics does not send Order-Invoices because each account holder selects the number of months (1 – 18) they'd like to pre-pay for as well as the service level they'd like. Volgistics automatically sends email notices that the renewal date is approaching to the account's Billing Contact at regular intervals starting 60 days from the paid through date. You can find information on how to create an Order-Invoice here.

**Out Box Tab** - A tab on your Volgistics mailbox where you can send messages, and view saved and sent messages. Automatic messages that have been sent do not appear on your Out Box tab. You can learn more about the Out Box tab here.

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**Password** - Part of the credentials that System Operators use to login to the Volgistics system, and volunteers and Coordinators use to login to VicNet. The passwords are not the same as the PIN volunteers use to sign-in to VicTouch. System Operator passwords are initially created by the Administrator who creates the record. The initial volunteer and Coordinator passwords can be created in a variety of ways. You can learn more about volunteer and Coordinator passwords here.

**PDF** - A file format for Volgistics reports. PDF files can be opened with Adobe's Acrobat Reader DC program, the built-in PDF viewer in many web browsers, and outside programs designed to open this type of file. You can learn more about PDF files here.

**Photo** - System Operators can optionally upload photos of volunteers to the Profile tab of the volunteer record. The photos can also be uploaded by volunteers and Coordinators through the VicNet module. You can learn more about the photo feature here.

**Picture** - Please see Photo in this glossary for information.

**PIN** - Please see Number in this glossary for information.

**Place** - The middle tier, or level, in the Site, Place, and Assignment hierarchy used to organize your assignment records. You can learn more about this structure here.

**PO** - Please see Purchase Order in this glossary for information.

**Position** - Please see Assignment in this glossary for information.

**Post** - For some, *post* may mean a job, task, or station that a volunteer serves at. In this case, see Assignment in this glossary for more information. In Volgistics, *post* means to add service information to volunteer records. You can learn more about this in the Service Entry definition in this glossary.

**Power User** - A user level that controls the amount of access the System Operator has in the account. To customize the access, the account's Administrator(s) setup the Field Rights and Tab Rights for the Power User operators.

**Preference Field** - Fields used to allow applicants or volunteers to express an interest in serving at certain Sites or Places, or in certain Assignments. Preferences can also be setup for other things as well such as an Assignment Cluster, state or province, or one of the spare fields on the Assignment record. You can learn more about Preference Fields here.

**Preference Role** - Roles in Volgistics are used to show the volunteer's relationship, or standing, in a specific Assignment. The Preference Role is a default Role generally used to show that the volunteer has an interest in serving in an Assignment, but is not scheduled in the Assignment yet. If the Assignment Preference field is setup to automatically give a Role in an Assignment, it is commonly the Preference Role. Please see Role in this glossary for more information.

**Pre-payment** - A payment option for paying your Volgistics Service Fee by creating an Order-Invoice and then either mailing a check for payment, or paying the invoice by credit card. You can find more information here.

**Print** - Please see Reports in this glossary for information.

**Print Graphic** - This is an image uploaded to Volgistics so that it appears on PDF versions of reports that you generate. Please see Logo Graphic in this glossary for more information.

**Prior Year Comparison** - A field you can add to Service Summary reports to show hours served in the previous year for the time period listed in the report. The report automatically calculates the percentage of loss or gain between the two years. You can learn more about this here.

**Profile Tab** - This is a tab on volunteer and assignment records. For volunteers (not assignments), the tab contains information such as their Date of Birth, photo, spare fields, and preference fields. For volunteers *and* assignments, the tab can contain information such as the Daily Availability and Characteristic fields. You can find more information about the tabs on volunteer records here.

**Project** - Please see Assignment in this glossary for information.

**Prospect Status** - A default Status in Volgistics generally used to describe people who you have collected basic information from, but who have not started the steps to start volunteering (such as filling out an Application Form) yet. For example, if you have an open house you may collect the names and email addresses of guests and enter them as a volunteer in your database with the *Prospect* Status. This would allow you to send them invitations to apply to volunteer, while keeping them separate from your volunteers with the Active Status who are actively serving. Please see Status in this glossary for more information.

**Public Account Identifier** - A unique identification number for Volgistics accounts that is used to associate their VicNet or VicTouch access points with their account.

**Purchase Order (PO)** - A purchase order (or PO) is document used by the Accounts Payable departments of some organizations to indicate that they will be purchasing a product. Volgistics does not accept purchase orders as payment for service fees. If your organization requires you to use purchase orders as part of the payment process, you will need to wait for the check to be generated for the purchase order and then send the check to us. If it helps the payment process, you can add a purchase order number to an Order-Invoice. You can learn more about how to do this here.

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**Receipt** - A document showing that an Order-Invoice for Volgistics service fees has been paid. You can view, print, or save Receipts in the Volgistics Store for your account. You can learn how to do this here.

**Recognition** - Please see Awards in this glossary for information.

**Registration** - Please see Application Forms in this glossary for information.

**Regex** - Please see Regular Expressions in this glossary for information.

**Regular** - System Operators and Coordinators can put volunteers on the schedule on a repeating, or recurring, basis such as every Monday or every other Friday. Volgistics refers to a person who is scheduled like this as a *Regularly* scheduled volunteer.

**Regular Expressions** - Regular Expressions (or Regex for short) are not unique to the Volgistics system, but the *Search* fields on the column headings of the Volunteer Page support some Regular Expressions to help you search for records. You can find many resources to learn more about Regular Expressions on the Internet. One resource is RegexOne.

**Reports** - Volgistics includes reporting features you can use to retrieve information from your account. Reports can be generated in PDF or Microsoft Excel formatted files. Completed report files are sent to the In Box tab of your Volgistics Mailbox. They can be saved locally, or opened, from there. You can learn about the stock, or pre-made, reports in Volgistics here. You can learn about how to make custom reports here.

**Role** - The Role in Volgistics shows a volunteer's relationship to an Assignment. Having a Role in an assignment does not necessarily mean that the volunteer is scheduled in the assignment, or has service recorded in the assignment, although this is quite often the case. You can find more information about Roles here.

**Roster** - *Roster* is not a term that is used by Volgistics. Depending on where you are from geographically, *roster* can mean various things. If you use it to mean people who are scheduled, see *Schedule* in this glossary for more information. If you use *roster* to describe a list, roll, count, etc., you may need to contact the support team and describe what you're looking for. The support team will gladly assist you with details on how to get the information you need.

**Rules Tab** - The Rules tab is located on Assignment records. It is used for things such as controlling which volunteers can self-schedule for the assignment, or whether volunteers can schedule for any times or for openings only. You can also setup self-scheduling alerts on the Rules tab. You can learn more about the Rules tab here.

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**Schedule** - In Volgistics, the schedule is used to record information about when you expect volunteers to serve in the future. Because of this, the schedule for past years is not available indefinitely so you should not depend on the schedule to show historical information about when volunteers served in the past. Instead, we recommend using service entries to record information about when volunteers served in the past. Please note that service entries are not automatically created from the schedule--service must be put into the system using one of the methods shown here. You can find more information about the schedule feature in Volgistics here.

**Schedule Tab** - A tab on volunteer, Coordinator, Site, Place, or Assignment records that shows the schedule for that particular record. For example, a volunteer's Schedule tab will only show that volunteer's schedule, a Coordinator's Schedule tab will show the schedule for all assignments the Coordinator oversees, a Site's Schedule tab will show the schedule for all assignments that fall under the Site, etc.

**Schedule Entry** - The registration or recording of details for a volunteer's schedule. Schedule entries record the assignment, times or shift, date(s), and any special notes about when the volunteer is expected to serve.

Schedule entries can be for one date only, or for a repeating (ongoing) pattern of dates such as every 2nd and 4th Tuesday of the month. Schedule entries can simply place the volunteer on the schedule, or they can place the volunteer on the schedule as filling an opening slot.

**Schedule Icons** - Schedule icons provide a quick visual way to see if an opening slot is filled by an individual volunteer or a group member, or if it is still an unfilled opening slot. You can learn more about schedule icons here.

**Schedule Reminders** - Reminder messages sent by Email or text to volunteers and Coordinators. In most cases reminders are setup to be sent automatically by the system, but they can also be sent on-demand by System Operators. You can find more information on Schedule Reminder messages here.

**Schedule Reports** - These reports create PDF files with information about schedules in your account. You can find more information here.

**Secured-socket layer (SSL)** - An online encryption method Volgistics uses to scramble your account's information as it travels over the Internet. You can learn more about this here.

**Security Block** - A built-in security feature used to help safeguard your information. This feature automatically stops login attempt to your account if too many invalid login attempts have been made from the same IP address. You can learn more about this here.

**Self-Scheduling** - An account's Administrator(s) can configure the Volgistics account to allow volunteers to place themselves on the schedule as long as either the VicNet or VicTouch module is included in the organization's service level. You can find more information on how to enable and configure self-scheduling here.

**Self-Scheduling Alerts** - A type of alert sent to System Operators and/or Coordinators to notify them that a volunteer has added or removed herself from the schedule. The alerts can be configured to be sent for just specific assignments. You can learn how to enable self-scheduling alerts in the *Self-scheduling alerts* section of help topic 2172 here.

**Sender ID** - An email authentication protocol designed to combat spam. Volgistics offers two different Sender ID settings depending on how your organization handles Sender ID. You can learn more about this here.

**Service** - Please see Service Entry in this glossary for information.

**Service Detail Reports** - Reports designed to show service information in your account. The reports can be run in Excel or PDF format. You can find more information on Service Detail reports here.

**Service Directive** - See Mandatory Service in this glossary for information.

**Service Entry** - The registration or recording of details for a volunteer's past service with your organization. *Service entries* always record a date (or date range), and they can optionally record hours served, times served, the assignment the volunteer served in, and additional Service Measures that are setup.

The system will automatically calculate Merit Hours for the service entry if you have setup a rule that applies to the entry. In addition, service entries can be applied toward a Mandatory Service goal for the volunteer.

Service entries need to be created through one of the methods shown in help topic 1166 here. Service is not automatically entered based on the schedule. You can find more information about how service shows on a volunteer record here.

**Service Fee** - The payment required to use the Volgistics service at the service level you select for your account. Service fees are calculated by month, and you can select to make automatic monthly payments or pre-pay in advance for 1 to 18 months of service. You can learn more about Volgistics service fees here.

**Service Hours** - Please see Service Entry in this glossary for information.

**Service Level** - The maximums you choose for the number of non-archived volunteer records, archived volunteer records, and System Operators you can have in your account. Your *service level* also determines if your account has access to the optional VicNet, VicTouch, and VicDocs modules. You can find more information on this here.

**Service Mandate** - See Mandatory Service in this glossary for information.

**Service Measures** - Optional numerical fields you can setup to collect additional service information for things such as tours given, mileage driven, phone calls made, absences, visits, etc. You can find more information on Service Measures here.

**Service Summary Reports** - Reports designed to show service information in your account. The reports can be run in Excel or PDF format. You can find more information on Service Summary reports here.

**Service Tab (Mailbox)** - There is a Service tab on volunteer records and a Service tab on your Volgistics mailbox. This glossary item is for the mailbox. If you need information regarding the Service tab on volunteer records, see the Service Tab (Volunteer Record) item below.

The purpose of the Service tab on the mailbox is to allow System Operators review, edit, or delete service entries sent to be audited.

**Service Tab (Volunteer Record)** - There is a Service tab on volunteer records and a Service tab on your Volgistics mailbox. This glossary item is for the volunteer records. If you need information on the mailbox, see the Service Tab (Mailbox) item above.

The Service tab on volunteer records has three purposes. The top of the tab is where the Roles a volunteer has in assignments are recorded. There is more information on this here. The middle of the tab is where the volunteer's service information is recorded. You can find more information on this here. The bottom of the tab is where Mandatory Service for the volunteer is configured.

**Service Values** - You can assign a monetary value to be associated with service information. For example, Independent Sector (a Washington, D.C. based advocacy coalition) announced the U.S. average for volunteer service value was \$23.56 per hour in 2015. The group also releases averages for each State and you can learn more at [https://www.independentsector.org/volunteer\\_time](https://www.independentsector.org/volunteer_time). You can learn more about setting service values in Volgistics here.

**Session** - A Volgistics session starts when a System Operator correctly enters her or his credentials from the Login link at [www.volgistics.com](http://www.volgistics.com). Each operator can only have one active session at a time. So if one person is logged-in, and another person uses the same credentials to login, the first person's session will end. Sessions will also expire automatically when the system does not sense any activity by the operator for an extended period of time. You can learn more about this here.

**Set** - A Set is a way to query your account to identify certain volunteers. After a Set has been created, you can do various things with it such as view the volunteers in the Set, send a message to the volunteers in the Set, or run a report that only includes the volunteers in the Set. You can learn more about the Sets feature here.

**Set Rule** - A *Set Rule* is any aspect of the Volgistics system that can be used to build a Set to query your volunteer records. You can find a complete list of the *Set Rules* that are available here.



**Setup** - The menu option that allows System Operators to configure their account. Access to the Setup menu is usually only given to Volgistics Administrator level operators, but access can optionally be given to Power and Basic User level operators also. You can learn more here.

**Shifts** - See Opening in this glossary for information.

**Sign-in Station** - See VicTouch Sign-in Station in this glossary for information.

**Site** - The top tier, or level, in the Site, Place, and Assignment hierarchy used to organize an account's assignment records. You can learn more about this structure here.

**Site Level Access** - A Volgistics feature that allows System Operators to be restricted to a single Site. When this is in place, the operator will only see Places and Assignments that are underneath their Site. The operator will also only see volunteer records associated with their Site. You can learn more about this feature here.

**Site Level Operator** - A System Operator who is assigned to one particular Site when the account uses Site Level Access.

**Slot** - See Opening in this glossary for information.

**Spare Fields** - Fields that the account's Administrator(s) can customize to meet the organization's needs. You can learn more about what types of spare fields are available, what records they are available on, and more here

**SSL** - See Secured-socket layer (SSL) for information.

**Start Date** - The date a volunteer starts actively serving with your organization. By default this is the first Active Status date recorded for the volunteer, but the account's Administrator(s) can configure the account to use different Statuses for this date. You can find more information on this here.

**Statistics Box** - A box on the bottom of the Core tab of volunteer records that shows service information about the volunteer. Administrator(s) can configure the *Statistics box* to show the volunteer's Date of Last Activity and Years of Service, along with lifetime, year-to-date, and month-to-date service hours. Administrator(s) can also select to add two floating subtotals for customizable date ranges. You can learn more about how to configure the Statistics Box here.

**Statistics Reports** - Reports designed to summarize volunteer information such as demographics and retention for your entire account. You can learn more about these reports here.

**Status** - A volunteer's *Status* in Volgistics shows their current relationship with your organization. For example, an Applicant Status generally means that the volunteer has completed an application, but is not approved to serve yet. While an Active Status generally means that the volunteer has completed any vetting you require and is now actively serving. You can learn more about Statuses and how they are used here.

**Stock Reports** - These are pre-made, ready-to-run reports designed to meet many common needs volunteer organizations have for reporting. In addition to *stock reports*, you can also create custom reports if you cannot find a stock report that meets your needs. You can learn more about the stock reports available in Volgistics here

**Stop Date** - The date a volunteer stops actively serving with your organization. By default this is the first Inactive Status date recorded for the volunteer, but Administrator(s) can configure the account to use different Statuses for this date. You can find more information on this here.

**Store** - Please see Volgistics Store in this glossary for information.

**Substitute Role** - Roles in Volgistics are used to show the volunteer's relationship, or standing, in a specific Assignment. The Substitute Role is a default Role generally used to show that the volunteer is available to fill in for other volunteers who cannot serve as scheduled. Please see Role in this glossary for more information.

**System Operator** - A person who logs into the Volgistics account by using the *Login* button at [www.volgistics.com](http://www.volgistics.com). These are generally the leaders of the volunteer department. Operators have three different levels that are configured by the account's Administrator(s). These are Volgistics Administrator, Power User, and Basic User. You can find more information on System Operators here.

**System Operator Page** - The page where the account's Administrator(s) add, delete, and configure System Operator records for the account. Administrators control the user's credentials, as well as the operator's user level, the menu items the operator can access, the tasks or jobs the operator can perform, and whether the operator is a site level operator. You can find more information on the fields and settings on the System Operator Page here.

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**Tab Rights** - Tab rights give you the ability to hide certain tabs on volunteer records from System Operators with a certain user level. You can find more information on tab rights here. You may also want to see Field Rights in this glossary for more information.

**Tags** - Tags are a temporary way to identify a volunteer record (or a group of volunteer records). Once records are tagged, there are a variety of actions you can take. For example, you can change the Status of all the tagged records at once, or run a report for just the tagged volunteers. You can learn more about the Tags feature here.

**Tasks** - Tasks can mean a variety of things, but in most cases it is what the volunteers do to provide volunteer service. If this is the meaning you're using, please see Assignment in this glossary for more information.

**Text Messages** - Communication sent to your volunteers and/or Coordinators via text. You can find more information on text messages here.

**Tickler** - Tickler is an item on the Volgistics menu that provides a tool for System Operators to use to find volunteers who are need to complete a Checklist item or who are eligible to receive an Award. The term *Tickler* was used because it refers to a file or other aid used to remind someone of an upcoming event.

**Trainee Role** - Roles in Volgistics are used to show the volunteer's relationship, or standing, in a specific Assignment. The Trainee Role is a default Role generally used to show that the volunteer is learning to serve in an Assignment. Please see Role in this glossary for more information.

**Types** - Types provide a way to identify and categorize volunteer records. Types differ from Flags because a volunteer can only have one Type, but they can have multiple Flags. You can find more information here.

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**Unduplicated Volunteer Count** - A count available on Service Detail and Service Summary reports that shows how many volunteers have service information recorded during the time period the report covers. The count is *unduplicated* because it factors out situations such as one volunteer who has service recorded in two different Assignments under the same Place. You can learn more here.

**Unfiled Opening** - An unfiled opening slot means that a volunteer is still needed to serve in the shift the opening represents. Please note that one opening can have multiple slots (for instance if 5 volunteers are needed for the shift). So one opening may have unfiled slots even if volunteers are scheduled to fill other slots for the opening. You can use the schedule icons as a visual indicator of if the opening slot is filled or unfiled.

**User Level** - The amount of access that System Operators have to the system. The three user levels are Volgistics Administrator, Power User, and Basic User. By default, the user levels have about the same amount of access to the system. The Volgistics Administrator(s) customizes how much access each user level has by setting tab rights and field rights for the user level.

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**Values** - Please see Service Values in this glossary for information.

**Vic** - Vic stands for Volunteer Information Center. When Volgistics references *Vic* it means the item relates to one of the three optional modules (VicNet, VicTouch, or VicDocs), or a feature available in these modules such as Vic Mail.

**Vic Graphic** - Graphics or images used to represent things such as the tabs or buttons shown in the VicNet module. You can customize these to "brand" or personalize your account. You can find more information here.

Your account may also have logo graphics. Please see Logo Graphic in this glossary for more information.

**Vic Mail** - Messages sent to volunteers through the VicNet or VicTouch modules. You can find more information here

**Vic Self-Scheduling** - Please see Self-Scheduling in this glossary for information.

**Vic Tab** - A tab on the volunteer record where you can review a volunteer's access to the VicNet and VicTouch modules. You can find more information on the Vic tab here.

**VicDocs** - An optional module that you can add to your account's service level if you want to store electronic documents such as a photo release form a volunteer has signed. You can learn more about the VicDocs feature here.

**VicNet** - An optional module that you can add to your account's service level to allow volunteers to sign-in over the Internet to do things like update their contact information, view messages, see their current schedule, add or remove themselves from the schedule, view their past service, or enter new service information. You can learn more about this module [here](#).

**VicNet Mobile** - A mobile friendly view of the VicNet module for volunteers who access VicNet on cell phones or tablets. You can learn how to enable and customize the mobile view [here](#). You can find a guide to teach volunteers how to use VicNet mobile [here](#).

**VicTouch** - An optional module that you can add to your account's service level to allow volunteers to clock-in and clock-out when they arrive and depart from your facility. The system automatically creates a service entry on the Service tab of the volunteer record when the volunteer signs-out. You can learn more about this module [here](#).

**VicTouch Sign-in Station** - A computer or tablet that is setup to launch the VicTouch module. When VicTouch is included in your account's service level, you can set up as many sign-in stations as you need without impacting your monthly service fees. You can learn how to configure a computer to use as a sign-in station [here](#).

**Volgistics Administrator** - A System Operator who generally has access to all aspects of the account. By default, the person who creates the account is the account's *Administrator* and this person can then create other operator records at any of the three levels: *Volgistics Administrator*, Power User, or Basic User. You can learn more about *Volgistics Administrator* level operators [here](#).

**Volgistics Store** - Each account has a *Volgistics Store* that is used to arrange for payment of the account's service fees. The Store can only be accessed by Administrators for the account, or people who have the Accounting Access Code for the account. To get to the Store, go to [www.volgistics.com](http://www.volgistics.com), hover over *Try or Buy* on the menu, and select *Store*.

**Volunteer and Assignment Matching** - An optional feature that an account's Administrator(s) can enable that will help find volunteers who are a good fit to serve in an Assignment. You can learn more about this feature [here](#).

**Volunteer Count** - Information about the number of volunteers in your account. *Count* can mean different things depending on the criteria you use to determine if a record qualifies. For example, Administrators can find the total number of *records* in the account by going to Setup, then *Account management*, and then *Account status*. Operators can also get counts for just records that meet certain criteria as shown [here](#). Please note that group records will only count as *one* record for these two methods even though the group may represent many volunteers. Operators can also pull counts for volunteers who have service recorded in a specified date range with an unduplicated volunteer count. With this method, groups will show with the number of volunteers who performed the service, but there is not a way to factor out if the same volunteers from the group gave service [more than once](#).

**Volunteer List** - Please see Volunteer Page in this glossary for information.

**Volunteer List Reports** - Reports designed to show information about volunteer records in your account. These reports are laid out in a table format and you can setup the report to be sorted in different ways such as by the volunteer's number, Start Date, Date of Last Activity, or lifetime service hours. The reports can be run in Excel or PDF format. You can find more information on Volunteer List reports [here](#).

**Volunteer Number** - Please see Number in this glossary for more information.

**Volunteer Page** - This is also known as the *volunteer list*. This is the page you see when you select *Volunteers* from the top of the menu. You can find information about how to control which fields appear as columns on the volunteer page [here](#). You can find information about how to search for specific records on the volunteer page [here](#).

**Volunteer Profile Reports** - Reports designed to show information about the volunteer records in your account in a directory type format. These reports are only available in PDF format and they are the only reports that can contain volunteer photos. You can find more information on Volunteer Profile reports [here](#).

**Volunteer Records** - Your volunteer records are accessed from the *Volunteer* page in your account. Volunteer records can be in the archived or non-archived section of your account. You can find information on how to find archived records [here](#). You can find information on how to find non-archived records [here](#).

A volunteer record can represent one person (individual records) or multiple volunteers (group records). Group records only count as one record toward the cap set for your account's service level even though they represent multiple volunteers. Volunteer records can be created in a variety of ways as shown [here](#). You can learn more about the tabs and fields on volunteer records [here](#).

**VolunteerWorks** - VolunteerWorks is Volgistics' legacy software. Support for this product ended in 2008 but we offer free conversions to Volgistics for organizations who are still using VolunteerWorks. You can learn more about this at <https://www.volgistics.com/VolunteerWorks-conversion.htm>.

**Volunteers Tab** - The Volunteers tab is a tab on Site, Place, Assignment, or Coordinator records. The purpose of the tab is to show volunteers associated with Assignments through a Role in the Assignment. If you use the optional Volunteer and Assignment Matching feature, the Volunteers tab on Assignment records can also show volunteers who match the Assignment's criteria. You can learn more about the Volunteers tab on a Site record here. To learn about the tab on a Place record, click here. And, to learn more about the tab on an Assignment record, click here.

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**Web Browser** - A web browser is an app or software you have on your computer or device that allows you to access the Internet. Approved web browsers for Volgistics include Chrome, Firefox, Internet Explorer (9 or higher), and Safari. You can learn more about web browsers and other system requirements for Volgistics here.

**Welcome Page** - The Welcome Page or screen is the first page System Operators see after they Login to Volgistics. Operators also see the page if *Welcome* is selected from the Volgistics menu. The Welcome page shows announcements from the Volgistics Team, account status information, and a *Tip of the Week* highlighting aspects of Volgistics that System Operators may be unaware of. Additionally, Administrators can setup the Welcome page to show statistics about the account and a list of volunteer birthdays. You can learn more about the statistics box here and the birthday list here.

**Who's Here** - The Who's Here page or screen is displayed if System Operators select *Who's Here* from the Volgistics menu. The main purpose of the page is to show which volunteers are currently signed-in to the VicTouch module. The page can also be setup to show volunteers who were signed-in previously during the day, volunteers scheduled for the day, or unfilled opening slots. You can learn more about the Who's Here page here.

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**Year-to-date (YTD)** - The year-to-date (YTD) total is the sum of all service hours entered for a volunteer from the first of the year to the current date in the year. *Please note that "year" can mean either the calendar year or the fiscal year depending on how you have your account configured.* For example, if the current date is September 15th and your account does not have a fiscal year set, the YTD figure will be all hours given from January 1st to September 15th. However, if the current date is September 15th and your account is set to have a fiscal year that starts June 1st, the YTD figure will be all hours given from June 1st to September 15th. The YTD figure can be added to the Statistics box on the Core tab of the volunteer's record, and is available on the Fields tab of most reports.

**Years of Service** - Years of service is the amount of time volunteers have been with your organization. In Volgistics, the system automatically calculates this total based on the volunteer's Status dates. By default, only time in the Active Status is counted, but account holders can configure different Statuses to count toward the total as well. You can find more information on this here.

**YTD** - Please see Year-to-date (YTD) in this glossary for information.

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## Appendix A: Help Topics Sorted Alphabetically.

Click each help topic below to be linked to that page.

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2008	"Email me a copy" and "Text me a copy" buttons on the VicTouch schedule page	1595
2458	"Volunteers Serve up to" Field Properties Setup Page	1229
1102	A scheduled volunteer does not appear to cover a schedule opening	743
1190	A volunteer or coordinator cannot open a Microsoft Word file attachment	317
2385	Access Disabled Setup Page	1114
2053	Access Not Permitted from This Computer	1596
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2143	Accounting Access Code	728
2216	Add a Place	108
2217	Add a Site	110
2215	Add an Assignment	106
2026	Adding a New System Operator	1440
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1113	Adding a Sender ID policy for Volgistics	308
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8052	All Service by Assignment-Calendar Yr (stock)	673
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2090	Assignment Field Properties Setup Page	996
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2412	City Field Properties Setup Page	1154
2435	City Field Properties Setup Page	1191
2466	City Field Properties Setup Page	1243
2514	City Field Properties Setup Page	1295
2344	Class Event Field Properties Setup Page	1040
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1111	Coordinators	163
1111	Coordinators	163
2294	Core Tab	1868
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2394	Country Field Properties Setup Page	1132
2415	Country Field Properties Setup Page	1161
2438	Country Field Properties Setup Page	1197
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