

## How-To Guide on Entering Volunteer Shifts

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## Log-in



The screenshot shows the volunteermatters login interface. At the top left is the logo "volunteermatters" with the tagline "volunteer management made easy!". To the right is the text "Demonstration System". Below the logo is the text "VolunteerMatters production Build 20110614.2235". A green navigation bar at the top has a house icon labeled "Home". The main content area has a green header with the text "Registered Users:" underlined. Below it is a "Sign In:" section with fields for "Username" and "Password", a "Remember Me" checkbox, and a "Login" button with a key icon. At the bottom of the sign-in section are links for "Forgot your username or password?".

Visit:  
<http://www.volunteermatters.com/customercode> (please replace customercode with your unique customer code).

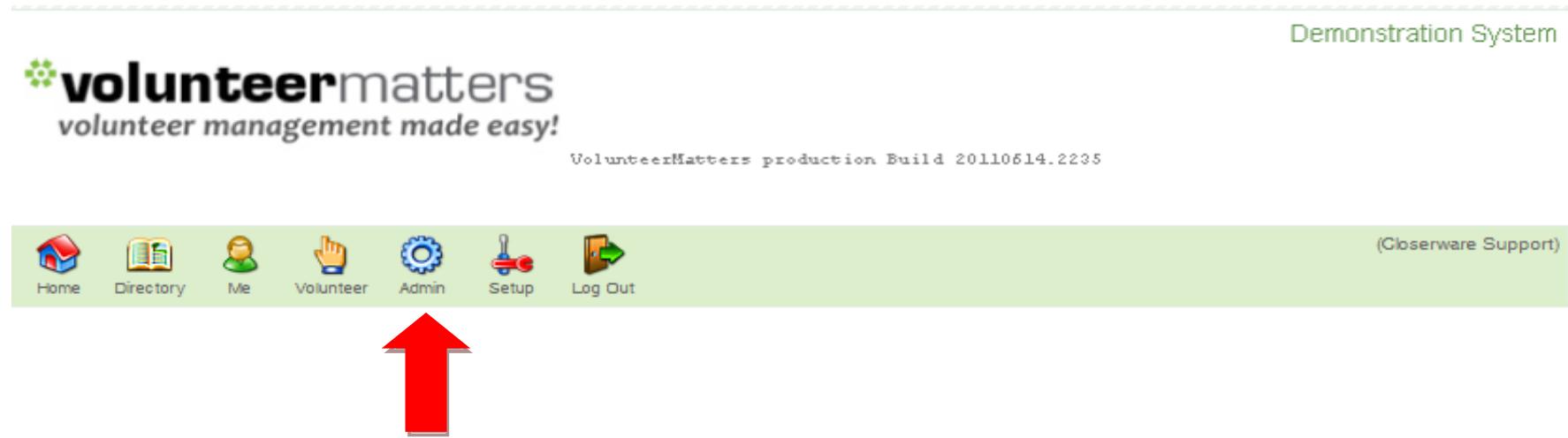
If you do not know your customer code please email [closerware support](#).

Enter your username and password.

If you have not been set up with a username and password, please contact your organization's administrators.

## Visit the 'Admin' Section

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**Under 'Volunteering' group click the calendar/category under which you would like to create new volunteer shifts.**



The screenshot shows the volunteermatters software interface with a green header bar. On the right side of the header, it says "Demonstration System". Below the header is a navigation bar with icons for Home, Directory, Me, Volunteer, Admin, Setup, and Log Out. To the right of the navigation bar, it says "(Closerware Support)". The main area is divided into three sections: "Contacts", "Communication", and "Volunteering". The "Volunteering" section is highlighted with a red arrow pointing to it from the bottom right. It contains a grid of 18 items, each with an icon and a label:

Icon	Label
	Volunteer Calendars
	NNS Saturday Sign In (Actives Only)
	Provisional Class Project/Home Run for Healthy Kids
	Home Run for Healthy Kids -Service Shift - Active Sunday
	Done in a Day (formerly Community Involvement)
	Service Shift - Done in a Day (formerly Community Involvement)
	NNS Summer Concentrated Provisionals
	NNS Fall Bag Day (Provisional Special Event)
	Holiday Sale Set Up (Provisional special event)
	Holiday Sale (Provisional special event)
	Spring Bag Day (Provisional special event)
	NNS Weekday Sign In
	NNS Provisional 5 hour Saturday Shifts
	NNS Provisional 8 Hour Saturday Shifts
	NNS Active Saturday Service Shifts
	NNS Active Weekday Service Shifts
	NNS First Tuesday WorkNight Provisionals
	Fall Formal Event (Provisional Special Event)
	Spring Formal Event (Provisional Special Event)
	NNS 2 Hour Closing Shift
	KITK Home Run Shifts
	October GMM

Select edit to the right of a shift to change an existing shift (blue). Select 'Add' to add new shifts (red)

This screen will list all of the current shifts scheduled for the calendar/category you chose in the previous step. By default, it is organized by date and time.

	Calendar	Shift	Status	Date	Start Time	End Time	Max Slots	Assigned Count	
1	Done in a Day (formerly Community Impact)	DIAD Placement Shift for HRHK	Released	2010-10-08	8:00 AM	12:00 PM	20	1	<a href="#">edit</a> <a href="#">Assignments</a>
2	Done in a Day (formerly Community Impact)	DIAD Placement Shift for HRHK	Released	2010-10-08	11:00 AM	3:00 PM	20	1	<a href="#">edit</a> <a href="#">Assignments</a>
3	Done in a Day (formerly Community Impact)	Let There Be Mom Birthday Party	Released	2010-10-09	9:30 AM	12:00 PM	2	1	<a href="#">edit</a> <a href="#">Assignments</a>
4	Done in a Day (formerly Community Impact)	DIAD Placement Shift for HRHK	Released	2010-10-09	9:30 AM	1:30 PM	6	5	<a href="#">edit</a> <a href="#">Assignments</a>
5	Done in a Day (formerly Community Impact)	DIAD Placement Shift for HRHK	Released	2010-10-09	12:30 PM	4:30 PM	20	1	<a href="#">edit</a> <a href="#">Assignments</a>
6	Done in a Day (formerly Community Impact)	Lungs for Life Poster Distribution	Released	2010-10-11	5:00 PM	6:00 PM	19	1	<a href="#">edit</a> <a href="#">Assignments</a>

## Create new volunteer shift(s)

**Create Calendar Shift(s)**

Add New Shift(s)

Calendar Done in a Day (formerly Community Impact)

\* Name

Description

\* Shift Start Date   \* Shift End Date  

\* Days of Week  Sun  Mon  Tue  Wed  Thu  Fri  Sat

\* Start Time   now

\* End Time   now

\* Max Slots 0

\* Status Locked 

 Cancel  Preview

This is the 'Add New Shifts' screen.

Fill in all of the boxes with event data.

Pay attention to the date and time formats required by the system  
(Clicking the calendar icon and use the built-in selector with insert the proper date format. Clicking the 'now' icon on times will illustrate the required time format HH:MM AM)

For the 'Shift Status' it is a good idea to mark as "Locked" during this process, so you don't release an event in error too early.

When you have finished entering all of the data and marked the event's status, click on the "preview" button. This will allow you to review the data prior to uploading it onto the calendar.

## Sample new volunteer shift(s)

**Create Calendar Shift(s)**

Add New Shift(s)

Calendar Done in a Day (formerly Community Impact)

\* Name Sample Volunteer Shift

Description description for a volunteer shift to illustrate the process for creating new shifts. This is a sample description for a volunteer shift to illustrate the process for creating new shifts.

\* Shift Start Date 2011-01-01     \* Shift End Date 2011-01-31

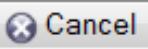
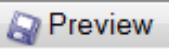
\* Days of Week  Sun  Mon  Tue  Wed  Thu  Fri  Sat

\* Start Time 10:00 AM      now

\* End Time 02:00 PM      now

\* Max Slots 4

\* Status Locked 

 Cancel  Preview

The name of the shift appears in the calendar/category listing. It should be descriptive but as brief as possible.

The description of the shift appears when a volunteer clicks on the shift for more detail.

The shift start and ends dates are for the period this shift will recur. If this shift is for a single day, you may enter the same date. In this example, these are shifts being created for the month of January in 2011.

Check the days of the week this shift will occur. In this example this shift is on all Mondays, Wednesdays, and Fridays for the month.

The max slots are the total number of people you need for this shift.

Shifts with a locked status can be viewed by volunteers but cannot be signed up for. Shifts with a released status are available for sign-ups.

## Preview and create new volunteer shift(s)

**Create Calendar Shift(s)**

Add New Shift(s)

Name	Description	Start time	End time	Max Slots	Status
Sample Volunteer Shift	This is a sample description for a volunteer shift to illustrate the process for creating new shifts. This is a sample description for a volunteer shift to illustrate the process for creating new shifts. This is a sample description for a volunteer shift to illustrate the process for creating new shifts. This is a sample description for a volunteer shift to illustrate the process for creating new shifts.	10:00 AM	02:00 PM	4	Locked

Dates

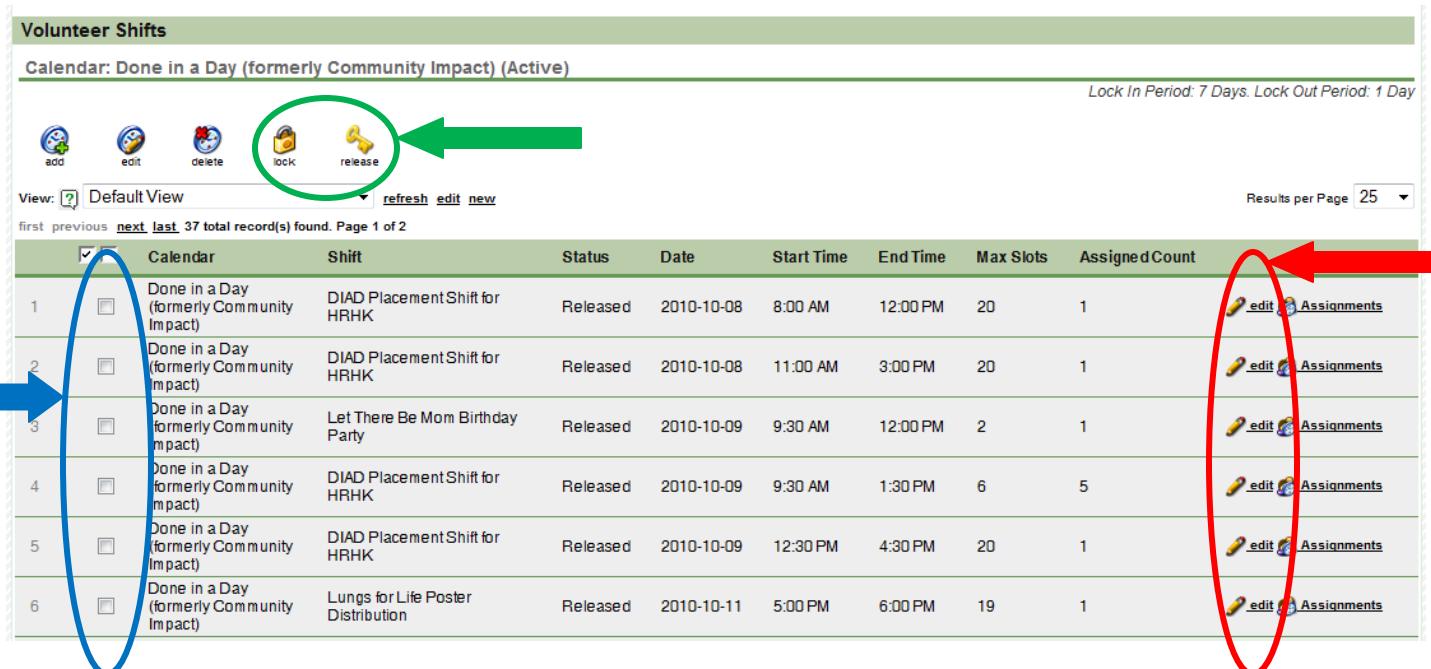
Sun	Mon	Tue	Wed	Thu	Fri	Sat
<input type="checkbox"/> 2	<input checked="" type="checkbox"/> 3	<input type="checkbox"/> 4	<input checked="" type="checkbox"/> 5	<input type="checkbox"/> 6	<input checked="" type="checkbox"/> 7	<input type="checkbox"/> 8
<input type="checkbox"/> 9	<input checked="" type="checkbox"/> 10	<input type="checkbox"/> 11	<input checked="" type="checkbox"/> 12	<input type="checkbox"/> 13	<input checked="" type="checkbox"/> 14	<input type="checkbox"/> 15
<input type="checkbox"/> 16	<input checked="" type="checkbox"/> 17	<input type="checkbox"/> 18	<input checked="" type="checkbox"/> 19	<input type="checkbox"/> 20	<input checked="" type="checkbox"/> 21	<input type="checkbox"/> 22
<input type="checkbox"/> 23	<input checked="" type="checkbox"/> 24	<input type="checkbox"/> 25	<input checked="" type="checkbox"/> 26	<input type="checkbox"/> 27	<input checked="" type="checkbox"/> 28	<input type="checkbox"/> 29
<input type="checkbox"/> 30	<input checked="" type="checkbox"/> 31					

Cancel  Create Shifts

The preview displays the shift data (blue) and a calendar/category where each day a shift will be created has a check in its box. If there are any exceptions (days that should be removed or days that should be added, you may check or un-check the appropriate boxes. In this sample there is a check for every Monday, Wednesday, and Friday in the month of January.

If you need to change any settings you may click the "Cancel" button. Otherwise, click the "Create Shifts" button.

## Release/lock volunteer shift(s)



The screenshot shows the 'Volunteer Shifts' page with a green header bar. Below it, a toolbar includes icons for add, edit, delete, lock (circled in green), release (circled in green), refresh, edit, and new. A green arrow points from the 'release' icon towards the table below. The table has columns: Calendar, Shift, Status, Date, Start Time, End Time, Max Slots, Assigned Count, and two edit/assignments buttons. A blue arrow points to the first row's checkbox. A red arrow points to the 'edit' button in the last row. The table lists six shifts, all released.

	Calendar	Shift	Status	Date	Start Time	End Time	Max Slots	Assigned Count	edit	Assignments
1	<input type="checkbox"/> Done in a Day (formerly Community Impact)	DIAD Placement Shift for HRHK	Released	2010-10-08	8:00 AM	12:00 PM	20	1		
2	<input type="checkbox"/> Done in a Day (formerly Community Impact)	DIAD Placement Shift for HRHK	Released	2010-10-08	11:00 AM	3:00 PM	20	1		
3	<input type="checkbox"/> Done in a Day (formerly Community Impact)	Let There Be Mom Birthday Party	Released	2010-10-09	9:30 AM	12:00 PM	2	1		
4	<input type="checkbox"/> Done in a Day (formerly Community Impact)	DIAD Placement Shift for HRHK	Released	2010-10-09	9:30 AM	1:30 PM	6	5		
5	<input type="checkbox"/> Done in a Day (formerly Community Impact)	DIAD Placement Shift for HRHK	Released	2010-10-09	12:30 PM	4:30 PM	20	1		
6	<input type="checkbox"/> Done in a Day (formerly Community Impact)	Lungs for Life Poster Distribution	Released	2010-10-11	5:00 PM	6:00 PM	19	1		

Once you have the volunteer shift data loaded, you can "Release" the volunteer opportunity, which allows contacts to sign up via the Contact Volunteer Calendar/Category. If the volunteer shift data is not complete you can keep the volunteer opportunity "Locked". To change a single shift's status (from locked to release or vice versa) click 'Edit' to the right of its listing (red). To change multiple shift statuses at once, place a checkmark in the box to the left of each shift (blue) and click the 'Lock' or 'Release' icon (green) whichever is appropriate.

**NOTE: Once contacts have signed up for an event you cannot change the event's date start time or end time. Do not release volunteer opportunities until they have confirmed and complete information.**

## If managing volunteer opportunities for multiple calendars/categories

Screenshot of the VolunteerMatters software interface showing the 'Volunteering' section. A blue arrow points from the top navigation bar to the 'Volunteer Calendars' icon, which is highlighted with a red circle. A red arrow points from the 'Volunteer Shifts' heading to the same 'Volunteer Calendars' icon.

The 'Volunteer Shifts' heading is followed by the text: "Calendar: Done in a Day (formerly Community Impact) (Active)". Below this, there is a toolbar with icons for add, edit, delete, lock, and release. The 'View' dropdown is set to 'Default View'. The results table shows 37 total records found, with 25 displayed per page. The table columns include: Calendar, Shift, Status, Date, Start Time, End Time, Max Slots, Assigned Count, and edit/Assignments links. The first few rows of the table are:

	Calendar	Shift	Status	Date	Start Time	End Time	Max Slots	Assigned Count	edit	Assignments
1	Done in a Day (formerly Community Impact)	DIAD Placement Shift for HRHK	Released	2010-10-08	8:00 AM	12:00 PM	20	1	<a href="#">edit</a>	<a href="#">Assignments</a>
2	Done in a Day (formerly Community Impact)	DIAD Placement Shift for HRHK	Released	2010-10-08	11:00 AM	3:00 PM	20	1	<a href="#">edit</a>	<a href="#">Assignments</a>
3	Done in a Day (formerly Community Impact)	Let There Be Mom Birthday Party	Released	2010-10-09	9:30 AM	12:00 PM	2	1	<a href="#">edit</a>	<a href="#">Assignments</a>

**You can tell which calendar/category you are currently managing by its name listed just below the 'Volunteer Shifts' heading (red).**

**If you are loading volunteer opportunities for multiple calendars/categories you can jump between volunteer calendars/categories by clicking on the calendar's icon at the top of the screen (blue).**