



Using Volunteer Opportunities
For Campus Coordinators

Training Agenda

- ★ Why Use Opportunities?
- ★ Creating Volunteer Opportunities
 - Calendars, Forms, URLs
- ★ Notifying Your Volunteers
- ★ Tracking Opportunities
- ★ Using Opportunities w/ Your Kiosk

Why Use Opportunities?

- ★ Organize activities at your school
 - Shared Responsibility
- ★ Communicate with school volunteers
- ★ Track who is attending & their hours
- ★ Sign-up through your kiosk
- ★ Recognize & award your volunteers

Creating An Opportunity

★ Settings

- Available ALL, Display Kiosk, #Needed

★ Basic Details

- Name, Category, Desc, Location

★ Schedule

- Start/End, Recurrence Pattern & End Date

★ Add To EZVolunteer Calendar

★ Assign Coordinators

★ Personalize Thank You & Continue Button

Settings

Add Opportunity

☒ Available ALL ☐ Display Kiosk

Volunteers Needed : Matched : 0 Logged : 0

Available ALL - Appears In MyAccount for your Vols

Display Kiosk - Appears On Start Vol Pg

Vols Needed - Limits Max Matched Vols

Details

Details - Volunteers see these details when they sign-up or log hours

Name Hearing Tests	Type Clerical/Office ▼	School Adams Elementary ▼
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Location
Central Office - 124 Main Street, Ourtown, TX 7778

Description
We need five (5) volunteer per shift for one-hour shifts from 9:00 AM - 12:00 PM on October 3rd to help sign-in patients and assist audio technicians.

Volunteers sign-in at front office reception (use your badge and select this opportunity when you sign-in). The clerk will direct you to the nurse's office.

Name - Appears In MyAccount & email

Type - Category For The Vol Activity

Location - Specifics, other than your school

Desc - Add'l info about arriving, etc.

Schedule / Calendar

Schedule - Set the start/end date and time. If this is a recurring opportunity start/end refer to the first occurrence

Start Time: 10/3/2016 9:00 AM ▼

End Time: 10/3/2016 12:00 PM ▼

☐ This is a recurring opportunity

☒ Add Opportunity To Calendar Select Event Type ▼

Single Event

Recurring Program

Schedule - Set the start/end date and time. If this is a recurring opportunity start/end refer to the first occurrence

Start Time: 9/30/2016 6:00 PM ▼

End Time: 9/30/2016 9:00 PM ▼

☒ This is a recurring opportunity

Recurrence Pattern

☒ Daily Recur every 1 week(s) on:

☐ Weekly ☐ Sunday ☐ Monday ☐ Tuesday ☐ Wednesday

☐ Monthly ☐ Thursday ☒ Friday ☐ Saturday

☐ Yearly

Range of recurrence

☒ End On: 10/28/2016 ▼

☐ End After: 1 occurrences

☐ No End Date

☐ Add Opportunity To Calendar

Start/End - Single Event / Recurring Program

Recurrence Pattern - Daily, Wkly, Monthly, Yrly

Recurrence Range - End date

Add Event To Calendar - Select Your School

Coordinators

Opportunity
Coordinators

-(optional) an opportunity coordinator as the contact for this opportunity

ASSIGN COORDINATOR(S)

FName	LName	Email	Phone	School	Notify On Sign-up
Demo	Partner	partner@relatrix.com		*Administration Building	<input type="checkbox"/>
Demo	Support	mfranke@relatrix.com	720-989-8195	*Administration Building	<input type="checkbox"/>

Page 1 of 1 (2 items) < [1] > Page size: 100





Assign - Choose One Or Multiple Registered Vol

Notify - Email Notification When Vols Signup

Thank You / Shift Schedule

Thank You Page - Include any comments or instructions, plus an optional URL for volunteers after they sign-up.

Additional Instructions:

Source **B** *I* U   Lucida S... 16  

Thanks for signing up for this opportunity!

Please use the **CONTINUE** button to view and select the shift that you can

body p span span span strong Characters: 372/1000

Followup URL:

Select A Survey/Form

Create Custom Thank You Message

Use External URL or Link To Form For Shift SignUp
(Displayed after volunteer clicks CONTINUE)

Calendar Sign-up

Calendar

[Refresh Calendar](#)

- ☒ Adams ES Vol Events
- ☒ Demo ES Vol Events
- ☒ Demo HS Vol Events
- ☒ Demo MS Vol Events
- ☒ Johnson ES Vol Events

Day Week Month October 2016 Today

Mon	Tue	Wed	Thu	Fri	Sat	Sun
26	27	28	29	30 • 18:00 Football	01	02
03 • 09:00 Hearing	04	05	06	07	08	09
10	11	12				
17	18	19				
24	25	26				
31	01	02				

Adams ES Vol Events - Hearing

Start: 10/3/2016 9:00:00 AM
End: 10/3/2016 12:00:00 PM
Location: Central Office - 124 Main Street, Ourtown, TX 7778
Description: We need five (5) volunteer per shift for one-hour shifts from 9:00 AM - 12:00 PM on October 3rd to help sign-in patients and assist audio technicians. Volunteers sign-in at front office reception (use your badge and select this opportunity when you sign-in). The clerk will direct you to the nurse's office.
[CLICK HERE](#) to sign-up for this opportunity.
Contact:

1. * Choose All Shifts You Can Work:

- ☐ 9:00 AM - 11:00 AM (0 of 5 complete)
- ☐ 11:00 AM - 1:00 PM (0 of 5 complete)
- ☐ 1:00 PM - 3:00 PM (0 of 3 complete)

[Add To Calendar](#) [Back](#)

Upcoming Events Display On Website Calendar

Approved Volunteers Sign-up, Choose Shifts & Add To Personal Calendar

My Account Sign-up

The screenshot displays the 'My Account Sign-up' interface. On the left, under the 'Opportunities' header, users are instructed to sign up for an opportunity from a list. Below this, a section titled 'Schools on your profile that may have available opportunities:' lists '*Administration Building ,Demo High ,Adams Elementary'. A table lists available opportunities:

Name	School	Type
Football Concession_1	Demo High	At
Football Concession_2	Demo High	At
Football Concession_3	Demo High	At
Hearing Tests	Adams Elementary	Cle

A red arrow points to the 'Hearing Tests' link. To the right, a detailed view of the 'Hearing Tests' opportunity is shown:

- Opportunity:** Hearing Tests
- School:** Adams Elementary
- Location:** Adams ES - 124 Main Street, Ourtown, TX 7778
- Coordinator:** Demo Support
- Description:** We need five (5) volunteer per shift for one-hour shifts from 9:00 AM - 12:00 PM on October 3rd to help sign-in patients and assist audio technicians. Volunteers sign-in at front office reception (use your badge and select this opportunity when you sign-in). The clerk will direct you to the nurse's office.
- Starts:** 10/3/2016 9:00:00 AM
- Volunteers Needed:** 15
- Volunteers Still Needed:** 15

Below the detailed view, a modal window prompts the user to choose shifts for the 'Hearing Tests' opportunity on October 2nd:

We need volunteers for three shifts in the morning to complete our hearing tests Please choose the shift you want to work for the hearing tests opportunity at Adams Elementary on October 2nd.

1. * Choose All Shifts You Can Work:

- ☐ 9:00 AM - 11:00 AM (0 of 5 complete)
- ☐ 11:00 AM - 1:00 PM (0 of 5 complete)
- ☐ 1:00 PM - 3:00 PM (0 of 3 complete)

The modal includes 'Cancel' and 'Submit' buttons. A 'Hide Later' button is also visible on the right side of the detailed view.

Displays Available Opportunities From Selected Schools

After Sign-up Opportunities Are Moved To 'Hours' Tab For Logging

Volunteer List Email Sign-up

Volunteer List

☐ Filter/Search ALL Schools

☐ Hide inactive volunteers

Select All Displayed: 2 Selected: 0

<input type="checkbox"/>	LName	FName	Primary_Email	Phone	Register	Update	BG_Chk	ID_Verify	Hours	Role
<input type="checkbox"/>	Contact	Partner	vipin.agarwal@arcscorp.com	720-989-8195	07/01/2015	03/21/2016	08/16/2016	07/12/2016	Log Hours	Volunteer
<input type="checkbox"/>	Franke	Mark	mfranke@relatrix.com	970-668-9438	06/30/2015		07/05/2016	07/12/2016	Log Hours	Volunteer

Page 1 of 1 (2 items) Page size: 100

Filter Volunteers & NOTIFY or EMAIL

NOTIFY = Select Opp From List [Uses Opp Template]

EMAIL = Copy/Paste URL From Opp List [Custom Msg]

Track Matched Volunteers & Hours

The screenshot displays the 'Opportunity List' interface. At the top, there are controls for adding opportunities, viewing closed items, and deleting selected items. A dropdown menu shows 'Adams Elementary' is selected. Below these controls is a table with columns: ID, Name, School, Type, Start On, #Hours, #Volunteers, Status, and Get URL. Two items are listed: '11 School/Site Opportunity' and '2 Hearing Tests'. A red arrow points from the '4' in the '#Volunteers' column of the 'Hearing Tests' row to a second table below. This second table, titled 'TimeSheet', 'Detail', and 'List', shows a list of matched volunteers with columns: LName, FName, Email, School, Date Matched, Status, and Hours. The table lists four volunteers: Alexaner, Cowden, Kuch, and Support, all matched on 09/19/2016. The interface also includes pagination controls and a page size dropdown set to 100.

ID	Name	School	Type	Start On	#Hours	#Volunteers	Status	Get URL
11	School/Site Opportunity	Adams Elementary	Classroom	8/1/2015 7:00:00 AM	0	0	Logging	URL
2	Hearing Tests	Adams Elementary	Clerical/Offi	10/3/2016 9:00:00 AM	0	4	Logging	URL

LName	FName	Email	School	Date Matched	Status	Hours
Alexaner	Alison	alison_alexander@att.net	Adams Elementary	09/19/2016	Matched	0
Cowden	Joe	jcowden@happybank.com	Adams Elementary	09/19/2016	Matched	0
Kuch	Jill	jkuch@relatrix.com	Adams Elementary	09/19/2016	Matched	0
Support	Demo	mfranke@relatrix.com	*Administration Building	09/19/2016	Matched	0

School Opportunities List Shows Hours & Matched Volunteers

Drill-down To View Details Of Matched Volunteers

Coordinators Can Notify, Remove, Log Hrs, Or Create Roster

Track Shift Sign-up

Forms List

Add Form

Choose an action Go

Select All Displayed: 2 Selected: 0

<input type="checkbox"/>	Form Name	Preview	Results	Export	URL	Responses	Status	Shared
<input type="checkbox"/>	SAMPLE SIGNUP - One Day, Multiple Shifts					4	Active	
<input type="checkbox"/>	SAMPLE SIGNUP - Multiple Shifts/Multiple Days					1	Active	

Page 1 of 1 (2 items) [1]

Responses

Question: Choose All Shifts You Can Work: Response Text:

Response Option: 11:00 PM - 12:00 PM

Assign to NewsGroup: Adams ES - Christmas Carnival Go

Select All Displayed: 3 Selected: 0

<input type="checkbox"/>	Last Name	First Name	Email Address	Date Responded
<input type="checkbox"/>	Cowden	Joe	jcowden@happybank.com	09/19/2016
<input type="checkbox"/>	Support	Demo	mfranke@relatrix.com	09/19/2016
<input type="checkbox"/>	Kuch	Jill	jkuch@relatrix.com	09/19/2016

Forms List Displays Responses For Shift Sign-up

Click Responses To View Who Signed Up For A Shift

Export (By Users) To Download Excel File

EZVolunteer Kiosk



Adams Elementary Sign In

Volunteers:
Please use your Name Badge and the scanner to start or end your session today. If you do not have a Name Badge, use the Manual Sign In/Out buttons with your volunteer account username and password.

Visitors:
Please use the Visitor Sign In button. You will receive a temporary badge valid for today only. Sign out by using the scanner and you will receive your badge back. Use the Visitor Sign Out button.

Scan In/Out

Registered Volunteer
Manual Volunteer Sign In
Manual Volunteer Sign Out

Campus Visitor
Visitor Sign In
Visitor Sign Out


[Send us your comments](#)




***Administration
Demo
Volunteer**



VO000002
Volunteer



Adams Elementary Start Volunteering



Demo Support

Please provide the following information regarding your volunteer session. Choose 'Start' if you want to log your time or 'Just Visiting' if not. When you are finished volunteering, please sign/scan out at the kiosk to complete the session.

Arrival: 09/19/2016 05:01 PM

Expected Departure: 06:01 PM
(You can modify your expected departure time later, if it changes.)

Activity : **Hearing Tests**
(Choose any school activity or default to the school's generic event.)

Purpose of Visit:
(examples - 'Mrs. Jones Classroom help' or 'Lunch with student')

Main Menu **Just Visiting** **Start**

[Send us your comments](#)

Volunteers Sign-in With Account Details Or Name Badge

Select From Available Activities To Sign-up & Log Hours

Take Aways About Opportunities

- ★ School/Generic -vs- Event/Program
- ★ Event = One or Few Times; Copy & Add To Calendar
- ★ Program = Recurring; Display In Kiosk
- ★ Volunteer Limit Will Display 'FULL' To N+1 Sign-up
- ★ Available Opps Move To Hours Page After Sign-up

Contact Details

★ Relatrix Customer Support

866.670.6399

support@relatrix.com

★ Mark Franke – Relatrix Account Contact

800.570.6234 x501 or 720.989.8195

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