

i-Volunteer Online™

Administrator's Getting Started Guide

This document will show an Administrator how to log in,
set organizational Preferences, create and maintain events.

For additional help visit the support tab at www.i-VolunteerOnline.com.

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ABOUT SECURITY & PRIVACY

If *i-Volunteer Online™* is hosting your database (which it is unless you purchased the software and installed it on your own server) then your events and volunteer information are stored privately and securely on a dedicated virtual server. No other organizations will access or copy your data. *i-Volunteer Online™* will never share, copy, or review customers' databases other than to provide technical support or to back-up the system. Volunteers' e-mail addresses are only transmitted and visible to an Administrator, and are only used by the *i-Volunteer Online™* system to send system-generated confirmation, notification, and reminder e-mails. Furthermore *i-Volunteer Online™* will never send unsolicited e-mail to your volunteers or use or share your e-mail addresses in any way.

See the LICENSE AGREEMENT for further details including limits of liability and your responsibilities.

USE OF *i-Volunteer Online™* IS SUBJECT TO THE TERMS OF THE LICENSE AGREEMENT

The License Agreement is available for review at the following link:
http://www.tandtsoftware.com/main/licenses/ivolunteer_license_S091115.html

LOGGING INTO *i*-Volunteer Online™

In your web browser, go to the unique address that has been set up for your organization. The address should look something like:

http://www.i-volunteeronline.com/your_organziation.asp

NOTE: If your organization purchased and installed the software on your own server then the address should look something like **http://www.your_domain_here.com/volunteer.asp**.

When you successfully reach this address the “Welcome” screen should appear:

Welcome to <i>i</i> -Volunteer Online™ for My Organization
For Volunteers: <input type="text" value="-select an event-"/> <input type="button" value="Go"/>
For Administrators: <input type="text"/> <input type="button" value="Login"/>

[i-Volunteer Online 9.1121](#), ©2005-2009 [T&T Software](#)

From this “Welcome” screen anyone can view a list of your organization’s active and enabled events. The administrator sees any event including past and hidden events.

The Administrator must log in to create or administer events by keying a password and pressing **Login**. Key the password that was assigned for your organization (or key “1234” if a password has not been assigned). After you successfully log in, the “Welcome” screen looks like this:

Welcome to <i>i</i> -Volunteer Online™ for My Organization You are logged in as the event administrator.
Edit or Create an Event: <input type="text" value="-select an event-"/> <input type="button" value="Administer"/> <input type="checkbox"/> Show past events
<input type="button" value="Preferences"/>
<input type="button" value="Logout"/>

[i-Volunteer Online 9.1121](#), [License](#), ©2005-2009 [T&T Software](#)

Press **Preferences** to begin customizing the Preferences to fit your organization.

SETTING ESSENTIAL PREFERENCES

The **Preferences** screen looks like this:

i-Volunteer Online™ Organizational Preferences		Save Exit
The preferences set here apply to all events.		
Password & Security: Old Password: <input type="text"/> New Password: <input type="text"/> Confirm New Password: <input type="text"/> <input type="checkbox"/> Use a secure HTTPS connection when logged in as the administrator.	This is the administrator password. It is case sensitive. Use a HTTPS connection if the administrator might access this site from a public or unsecured network. HTTPS may be a little slower than HTTP.	
Organization name:	<input type="text" value="My Organization"/>	[ORGANIZATION]. This is your organization's name.
Time Zone:	<input type="text" value="GMT-05:00 Eastern Time"/> ▼	Your organization's primary time zone.
Primary e-mail contact:	<input type="text" value="volunteer@i-volunteeronline.com"/>	[EMAIL]. Notification e-mails are sent here.

You should change the **password** and customize any other **Preferences** to fit your organization.

TIP: If you are trying to start quickly then at least go through this **ESSENTIAL PREFERENCES** section and the preferences for **Privacy statement** and **Obligation & liability disclaimer** under the section **SETTING MESSAGE AND E-MAIL CONTENT PREFERENCES**. Then skip to **CREATING YOUR FIRST EVENT**.

All of the Preferences apply to all events. You must press **Save** after modifying any of the Preferences before they will be applied.

To change the **Password**, key the current password and a new password then press **Save**.

WARNING: Currently you can have only one *Administrator password* per organization. However more than one person can log in as an Administrator from separate computers at the same time. **Exercise caution when sharing your password because i-Volunteer Online™ cannot guarantee recovery events or information that you modify or delete.**

OPTIONAL: If the server your account is running on provides SSL Security, you will see a security option **“Use a secure HTTPS connection when logged in as the administrator.”** If you check this option, an administrator’s browser will operate using a secure HTTPS connection, which ensures that most information transmitted over the internet between an administrator and i-Volunteer Online™ is encrypted. Using HTTPS connections can be slightly slower than regular HTTP connections. i-Volunteer Online™ does not support HTTPS for volunteers, however other volunteers’ e-mail addresses are never displayed or downloaded back over the internet to volunteers as they are for administrators. See also the section in the front of this guide titled ABOUT SECURITY & PRIVACY.

Set **Organization name** to the name of your organization.

Set **Time zone** to the preferred time zone for reporting times in Reports and the Log.

Set the **Primary e-mail contact** to an e-mail address that belongs to your organization. This is the e-mail address that your volunteers will be provided to contact you for more information. It is also the administrative e-mail address that can receive a notification message when someone volunteers.

TIP: Individual events can override this primary contact and specify their own primary contact *if* the Preference **"Allow events to override the primary e-mail contact and specify their own"** is checked.

Set **E-mails come from** to an e-mail address that is known to the **"outgoing SMTP e-mail hosts"** (configured below). For hosted accounts, where SMTP e-mail hosts are set to "default," this should typically be *confirm@i-volunteeronline.com*. If you would like to set this to something like *your_organziation@i-volunteeronline.com* then you may, but please send an e-mail to *support@i-volunteeronline.com* to let us know. If the SMTP e-mail hosts are set to another server host, then this setting, "e-mails come from," should be an e-mail known to that host.

Set **E-mails appear from name** to a friendly identification. It can be any of: the name of your organization, your domain name, your e-mail, your administrator's name or e-mail, or leave it blank to show **"primary e-mail contact"** (above) as the sender's friendly identification.

Set **E-mails reply to** to the e-mail address where you want e-mail to go if a volunteer presses "reply" to a notification or reminder e-mail. You typically would make this the same as the primary e-mail contact.

If **E-mail "remove me" requests go to** is editable (because you have configured the **"outgoing SMTP e-mail hosts"** to something other than "default") then set this appropriately. You can leave it blank to omit having disclaimers appended to the bottom of outgoing system generated e-mails, however omitting disclaimers puts your e-mail at greater risk for being flagged as SPAM by recipients and eventually landing your organization's domain and/or its SMTP e-mail host on an e-mail *blacklist*.

Outgoing SMTP e-mail hosts defines what e-mail service is used to send system generated e-mails, including confirmation requests, notifications and reminders.

If **"From" Domain** is editable (because you have configured the **"outgoing SMTP e-mail hosts"** to something other than "default") then set this appropriately to match a domain recognized by your outgoing SMTP e-mail hosts, and to identify where your system generated e-mails are truly originating from. **"E-mails come from"** (configured above) must be in this domain. The **"from" domain** should look something like: *some_domain.com* (without any *www.* or other prefix).

If you are subscribing to the hosted service, then you should leave both **Primary Host** and **Backup Host** set to "default" and the other fields blank. A primary host is required. The backup host is optional and is used automatically if the system encounters an error sending through the primary host.

ADVANCED TIP: If you purchased the software, or for any other reason are using your own e-mail service, then configure the hosts appropriately to point to that e-mail service. These settings would be similar, for example, to the SMTP settings you would use to configure an Outlook client to send e-mail. In any case the host values should be one of: "default", "localhost", "mail.your_email_host_domain.com", or an IP address.

The **Start URL** identifies the main address and "Welcome" screen of your account.

The **URL to use in e-mail** identifies the friendly address and "Welcome" screen of your account. Typically you must leave this the same as the **Start URL**. If you want anyone to be able to reach your specific events from a list of all your currently active events, then publish this *Organization-specific* URL on your own web site, in e-mails, or newsletters. Alternatively you can link potential volunteers directly to specific events by publishing *Event-specific* URLs. See **URL** under the section CREATING YOUR FIRST EVENT for more discussion about which URL to use.

ADVANCED TIP: If you have your own web programmer that knows how to program *redirection*, then you may change this to a proxy link on your own web server. There is no great advantage to doing this other than the URL that your volunteers see is in your own domain. A proxy script must redirect the request to the **Start URL** and pass through the URL parameters (when they exist): **Submit**, **EventId**, **SlotId** and **Id**.

The following example is written in .asp but it could be done in other programming languages as well. You would put the script in a file on your own web server accessible by a URL something like http://www.your_domain_name.com/volunteer.

```
<%  
Dim params  
params = ""  
If Request.QueryString("EventId") <> "" Then  
    params = params & "EventId=" & Trim(Request.QueryString("EventId"))  
End If  
If Request.QueryString("Submit") <> "" Then  
    params = params & "&Submit=" & Trim(Request.QueryString("Submit"))  
End If  
If Request.QueryString("Id") <> "" Then  
    params = params & "&Id=" & Trim(Request.QueryString("Id"))  
End If  
If Request.QueryString("SlotId") <> "" Then  
    params = params & "&SlotId=" & Trim(Request.QueryString("SlotId"))  
End If  
If (params <> "") Then params = "?" & params  
Response.Redirect "http://www.i-volunteeronline.com/your_start_id.asp" & params  
%>
```

Don't forget to press **Save** at the top of the Preferences screen to apply any changes to Preferences.

SETTING MORE PREFERENCES

Notification:

Notification e-mails are brief e-mails sent to the primary e-mail contact when a volunteer confirms, confirms a cancellation, or saves an edit to any *additional fields* in a slot. If Confirmation Request e-mails are disabled for an event, then by default volunteers will also receive these notification e-mails when they sign-up.

Events:

Automatically put volunteer in *identical* slot when selected slot is taken.

Checking this option will allow the system to put a volunteer into the "best" slot so long as the slot is identical to the slot (i.e. row & column) where the volunteer literally signed up. This is helpful for events where the same slot is repeated in order to have multiple volunteers for an identical role. Two or more slots are considered *identical* only when their row and column headers match exactly (and, if any *additional fields* in those slots have been hidden with "n/a", only when the exact same *additional fields* have been hidden).

For example, if volunteer "A" tries to sign up in the same literal slot as a previous volunteer "B" and "B" has yet to confirm, then the system will try to put volunteer "A" in an identical nearby slot before it will kick volunteer "B" out of the original slot. The system will always try to select slots using the following precedence: literal slot first if open, then nearest open slot, then nearest canceled slot, then nearest unconfirmed slot. Volunteers will NEVER be alternatively placed in non-identical slots.

Allow events to override the primary e-mail contact and specify their own.

Checking this will allow each event to optionally have its own "primary e-mail contact" and "e-mails appear from name".

Allow events to be deleted by the administrator.

Checking this will enable the Delete button when administering events.

Require confirmation by e-mail for all events.

Un-checking this will allow each event to optionally require volunteers to confirm by e-mail. When e-mail confirmation requests are disabled for an event, volunteers are signed-up immediately without going through the e-mail confirmation process. Furthermore, e-mail address are not a required field which confirmations are disabled.

WARNING: Disabling e-mail confirmations is not recommended except for brief and temporary situations where your entire volunteer pool is trusted and, even better, in the same physical location. For example, a meeting where the volunteer pool is present at the same location with access to the event on a computer, but having everyone access e-mail is inconvenient. You should set the status of the event to **Hidden** if you do disable e-mail confirmations.

Log volunteers' actions.

Checking this records detail for each event showing what steps volunteers' are taking in the process of using the system. It is useful to gauge whether volunteers are having a successful experience. See also LOG under the section CREATING YOUR FIRST EVENT.

Show events list as:

This determines how the list of events appears on the "Welcome" screen. The choices are **Menu** or **List of Links**.

Menu:

For Volunteers:

-select an event-

List of links:

For Volunteers:

[Black & White Ball \(3/15/2010\)](#)
[Simple Example Event \(8/31/2010\)](#)
[Tad's Simple Example Event \(12/30/2009\)](#)
[Tad's Simple Example Event \(12/30/2010\)](#)
[Test MicroFestivus 2009 \(9/9/2010\)](#)

Sort events list by:

This determines how the list of events are sorted on the "Welcome" screen. The choices are **Title then Date** or **Date then Title**.

TIP: If you choose **Title then Date**, the events are sorted alphabetically by title *up to the first colon ":" in the title* and then by date. So, for example, the following events would be sorted as:

My Event: Orientation (1/15/2010)
 My Event: Activities (1/16/2010)
 My Event: Day3 (1/17/2010)

Public slot taken display format:

Determines how confirmed slots appear on the sign-up sheets.

Full name:	First name:	Last name:	Initials:	Taken (Custom):
Tad Woods	Tad	Woods	TW	Taken

Capture field style:

Determines how input fields in available slots appear on the sign-up sheets.

Shadow:	Box:	Underline:
name <input style="border: none; border-bottom: 1px solid black; width: 80px;" type="text"/> e-mail <input style="border: none; border-bottom: 1px solid black; width: 80px;" type="text"/> phone <input style="border: none; border-bottom: 1px solid black; width: 80px;" type="text"/>	name <input style="border: 1px solid black; width: 80px;" type="text"/> e-mail <input style="border: 1px solid black; width: 80px;" type="text"/> phone <input style="border: 1px solid black; width: 80px;" type="text"/>	name e-mail phone

Capture field labels:

The sign-up sheet collects at least a **Name** and **E-mail** address for each volunteer slot. You may change the labels that are presented, but these fields will always be treated as name and e-mail fields. If you specify a label for **Last Name** then first name and last name are collected and reported as separate fields.

Terminology displayed by system:

[SCHEDULE] [SCHEDULED] [SCHEDULING]

Set this appropriately depending on how your organization is using the system. The choices include:

“Commit, Committed, Committing”

“Join, Joined, Joining”

“Participate, Participated, Participating”

“Volunteer, Volunteered, Volunteering” (default)

“Schedule, Scheduled, Scheduling”

Participant users' title:

[PARTICIPANT_TITLE]

Set the participant's title to most appropriately identify what this guide otherwise refers to as a **Volunteer**. For example, if you are using the system for scheduling rather than volunteering then you might change this to **Participant** or **Employee**.

Logo URL:

This is an optional URL that will display your organization's logo or any image to the right of the instructions for all of your events. Any image you link to must legally belong to your organization. It should be in the form: **http://www.your_domain.com/some_image.xxx**

SETTING MESSAGE AND E-MAIL CONTENT PREFERENCES

You can customize and personalize the content of the following system generated messages and e-mail messages. Most of these support HTML tags in the content.

Volunteer sign-up instructions (top):	General instructions on how to sign-up. Appears at the top of the event above the sign-up sheet.
Volunteer sign-up instructions (bottom, optional):	General instructions on how to sign-up . Appears at the bottom of the event below the sign-up sheet. It may be helpful for large events to repeat and/or summarize the instructions from the top.
Volunteer cancellation instructions:	General how-to-cancel instructions. Appears at the bottom below the sign-up sheet.
Volunteer confirmation instructions:	Instructions telling a volunteer how to confirm his or her sign-up. This appears after a user keys their name, e-mail, etc. in a slot and presses Volunteer.
Request confirmation e-mail subject:	Subject of e-mail that goes to volunteers requesting their confirmation.
Request confirmation e-mail body:	Content of e-mail that goes to volunteers requesting their confirmation.
Volunteer confirmation message:	Message that appears when a volunteer successfully clicks a link from a confirmation e-mail.
Notification e-mail subject:	Subject of e-mail that goes to the administrative primary e-mail contact (and the volunteer if e-mail confirmations are disabled) when a volunteer confirms.
Notification e-mail body:	Content of e-mail that goes to the administrative primary e-mail contact (and the volunteer if e-mail confirmations are disabled) when a volunteer confirms.
Volunteer cancellation confirmation instructions:	Instructions that appear (when the default cancellation instructions are not overridden by an event) after a user keys their e-mail on the sign-up sheet in the relevant prompt and presses Volunteer to cancel.
Request cancellation e-mail subject:	Subject of e-mail that goes to volunteers requesting their cancellation confirmation.
Request cancellation e-mail body:	Content of e-mail that goes to volunteers requesting their cancellation confirmation.
Cancellation confirmation message:	Message that displays when a volunteer successfully clicks a link in a cancellation confirmation e-mail.
Cancellation notification e-mail subject:	Subject of e-mail that goes to the administrative primary e-mail contact (and the volunteer if e-mail confirmations are disabled) when a volunteer confirms cancellation.
Cancellation notification e-mail body:	Content of e-mail that goes to the administrative primary e-mail contact (and the volunteer if e-mail confirmations are disabled) when a volunteer confirms cancellation.
Reminder e-mail subject:	Subject of e-mail that goes to the confirmed volunteers when the administrator sends out reminders.
Reminder e-mail body:	Content of e-mail that goes to the confirmed volunteers when the administrator sends out reminders.
Preempted e-mail subject:	Subject of e-mail that goes to an unconfirmed volunteer when he or she is kicked out of their slot by another volunteer.

Preempted e-mail body:	Content of e-mail that goes to an unconfirmed volunteer when he or she is kicked out of their slot by another volunteer.
Privacy statement:	This should be your organization's Privacy Statement concerning information you collect from volunteers.
Obligation & liability disclaimer:	This should be your organization's statement concerning obligations and expectations of your volunteers and your organizations.

There are a number of dynamic variables that may be included (surrounded by braces) in the context of most messages and e-mails (listed above) to personalize content when generated by *i-Volunteer Online™*. The variables are:

[ADDITIONAL_INSTRUCTIONS]	Additional Instructions in E-mail as defined by each event.
[ADDITIONAL_FIELDS]	The list of <i>additional fields</i> and the values that the volunteer keyed, if any. Additional fields will also only appear if the visibility is set to Volunteer or Everyone for the event.
[AVAILABLE_SLOTS]	A count of open (including unconfirmed) slots in an event.
[DATE]	Event Date or range of dates as defined by each event.
[DESCRIPTION]	Event Description as defined by each event.
[EMAIL]	The primary e-mail contact as defined in Preferences or overridden by an event.
[EMAIL_FROM]	E-mails come from as defined in Preferences.
[EMAIL_PROMPT]	A input field for the e-mail of a volunteer to cancel.
[EVENT]	Event Title as defined by each event.
[LINK]	The URL to use in e-mail as defined in Preferences with parameters linking a volunteer or administrator to the related event and/or slot on the <i>i-Volunteer Online</i> web site.
[NO_BLANK_LINE]	Prevents a blank line inside of an HTML <PRE> block.
[ORGANIZATION]	The Organization name as defined in Preferences.
[PARTICIPANT]	A volunteer's name.
[PARTICIPANT_EMAIL]	A volunteer's e-mail address.
[PARTICIPANT_TITLE]	The Participant users' title as defined in Preferences.
[SCHEDULE] [SCHEDULED] [SCHEDULING]	Terminology displayed by system as selected in Preferences.
[SLOT]	Description of a slot (row header + column header) that the volunteer signed up for.
[SUBMIT]	A Volunteer button that will submit what the volunteer keyed on the sign-up sheet.

CREATING YOUR FIRST EVENT

Go to the *i-Volunteer Online™* URL address for your organization. From the “Welcome” screen log in as the Administrator, if the “welcome” screen is not already indicating that you are logged in.

Select “-create new event-” from the “Welcome” screen and press **Administer**.

You should now see the following screen for managing an event. From this screen you can define the event, build its sign-up sheet, add/remove/modify volunteers, run reports and send reminders for the event.

Give the event a **Title**. Optionally give the event a **Start Date**, **End Date** and **Description**. The title, date, and description will all appear to volunteers and on reports as part of the event’s header.

TIP: The End Date should be in the future or the present day. An end date in the past automatically disables the event. No date at all leaves the event perpetually active. If your event spans more than one day then you probably should include specific dates within the sign-up sheet’s row or column headers so that volunteers will be clear about exactly which date they are signing up for.

The **Event Status** determines whether or not volunteers (or anyone who knows your organization’s *i-Volunteer Online™* URL address) will see this event listed on the “Welcome” screen and/or be able to sign-up to volunteer for it. The status choices are:

Enabled + In Menu	Volunteers can access the event from the “Welcome” screen and can sign-up.
Enabled + Hidden	Volunteers can access the event <u>only through the event-specific URL</u> and can sign-up.
Disabled	Volunteers can see the event <u>only through the event-specific URL</u> and <u>cannot</u> sign-up.

While you are designing an event you might want to set the Event Status to “Disabled.” Also, if an event’s **End Date** is in the past then the event is effectively Disabled.

Optionally key **Additional Instructions** that are specific for this event. **Additional Sign-Up Instructions** will appear immediately following the “**volunteer sign-up instructions**” (pulled from the Preferences). **Additional Instructions in E-mail** will be inserted into confirmation and reminder e-mails (pulled from the Preferences) for this event. Both of these event-level instructions support the same dynamic variables in their content as their counterparts from the Preferences.

Key in **How to Cancel** instructions only if and when you do not want volunteers to be able to cancel themselves online. Leave this blank if you do want volunteers to be able to cancel themselves online. You can change this field at any time leading up to the date of an event.

Volunteers are always prompted in slots for their **name** and **e-mail**. Optionally add or remove labels for up to four **Additional Fields** of information to collect for all slots in this event. By default additional fields will appear in every slot on the sign-up sheet; however they can be individually hidden with “n/a”.

TIP: There is no way to provide default values for *additional fields*; anything the administrator keys in the *additional fields* will be invisible to and overwritten by volunteers. However the administrator may hide an *additional field* for specific slots by keying “n/a” as the additional field’s values in those specific slots.

A powerful feature of **Additional Fields** is that they can remain visible and/or editable even after a volunteer has confirmed. The choices for **Additional Field Visibility when Confirmed** are:

Administrator Only	Only the Administrator can see values of additional fields.
Visible to Volunteer	The volunteer also sees values of additional fields <u>for his or her own slot</u> in confirmation request and reminder e-mails, and when viewing the event from the unique link provided in those e-mails.
Visible to Everyone	Everyone who views the event sees values of additional fields.
Visible to Volunteer + Editable by Volunteer	Same as Visible to Volunteer plus the volunteer can conveniently change and save the additional field values for his or her own slot. Also, if How to Cancel is blank for the event (allowing online cancellations) then the volunteer is also provided a convenient Cancel checkbox within the slot. If a volunteer edits or cancels then both the administrator and the volunteer will receive a notification e-mail.
Visible to Everyone + Editable by Volunteer	Same as Visible to Everyone plus Editable by Volunteer as described in previous choice.



Slot as seen by volunteer via confirmation link.

WARNING: It is your organization’s responsibility to decide if any of the information you are collecting should remain private and therefore not **Visible to Everyone**. If you select **Visible to Everyone** then also consider setting the event’s status to **Hidden** so that only those people who have been given the Event-specific URL will have access.

URL shows the event’s specific, unique web address where anyone (who has been given this URL) can go to view or sign-up for this event. Copy this URL into e-mail, newsletters, or on a web site that you use to recruit volunteers.

There are advantages and disadvantages to consider when deciding whether to publish **Event-specific URLs** or your **Organization-specific URL**. The advantages are highlighted in yellow.

	Event-specific URL	Organization-specific URL
Length	Longer http://www.i-volunteeronline.com/organization.asp?EventID=#####	Shorter http://www.i-volunteeronline.com/organization.asp
Directness	One click takes you directly to a specific event.	First click takes you to organization’s “welcome” screen where you then find and select the event from a list.
Publishing frequency	A separate URL must be published for each new event.	No need to publish a new link for each event since it appears in the “welcome” screen’s menu list.
Privacy	Known only to those who are given the event-specific URL IF you set the event’s status to Hidden.	Accessible to anyone who might know the organization-specific URL IF the event’s status remains In Menu .


Click the **Show/Hide Details** button  to show and enlarge some of the text fields. Click it again to hide most of the text fields.

Image URL is an optional URL that will display or any image to the right of the instructions for. Any image you link to must legally belong to your organization. It should be in the form:
http://www.your_domain.com/some_image.xxx

Build the sign-up sheet by pressing **Add Header**, **Add Row**, and **Add Column**. This creates slots where each slot represents a station, role, task or any function that you need volunteers for. Describe slots by keying text in the row and column headers. In the following example the row headers represent stations and the column headers represent time frames. Press **Save** to save any edits to the sign-up sheet.

Select				
<input type="radio"/>		1pm - 2pm	2pm - 3pm	3pm - 4pm
<input type="radio"/>	Station <U>1</U>	name Tad Woods e-mail tad@79ware.com phone	name e-mail phone	name e-mail phone
<input type="radio"/>	Station 2	name e-mail phone	name e-mail phone	name e-mail phone
<input type="radio"/>		Clean Up	Clean Up	
<input type="radio"/>		5pm - 6pm	5pm - 6pm	
<input type="radio"/>	Station <U>4</U> {Hidden}	name e-mail phone	name e-mail phone	name N/A e-mail phone

To move a row or column, first select the radio button at the head of the moving row or column and then press **Move Row** or **Move Column** button. After the screen refreshes, press the appropriate **Before** or **After** button where you want the row or column moved to.

Press **Preview** to see what the event will look like when a volunteer accesses the event.

TIP: Optimize the sign-up sheet by giving some thought to what you key in row and column headers. Consider that you can add new column headers anywhere in your event (by pressing **Add Header**), but there is only one set of row headers. In the above example it was efficient to put time frames in the column headers so that Station 4, using the first two columns could have a different set of time frames from the other Stations. The third column for Station 4 wasn't needed, so that was blocked out by keying anything for name.

TIP: We have seen sign-up sheets with over 1,000 slots work successfully. However a large sign-up sheet, even with over a couple hundred slots, might confuse volunteers by requiring significant scrolling and might open slowly for some users. Consider splitting a large event up into multiple smaller events.

TIP: If your headers need to contain a lot of text, you can add multiple back-to-back headers or use HTML line break tags,
. You can also use basic HTML in any labels including, for example, bold tags, , and even something like to add color.

TIP: Use curly braces around text that you want to show in the administrative mode but not in the volunteers' view. For example, {Comment to administrator}.

TIP: When you are done administering an event, press Done and then Logout from the "welcome" screen. If you do not log out then you will return to administrative mode any time you view a link to an event from this computer.

SIGNING UP VOLUNTEERS

As volunteers sign themselves up, those volunteers will appear on a refreshed sign-up sheet. The administrator can edit slots directly on the sign-up sheet to add, modify or remove volunteers.

The administrator can **add a volunteer** or **block a slot** by keying anything in the name field for the slot and pressing **Save**.

The administrator can **remove a volunteer** or **open a slot** by erasing text from the name and e-mail fields and pressing **Save**.

TIP / WARNING: The administrator may add rows and columns to a sign-up sheet even after volunteering begins. Any volunteers will move appropriately such that they remain with the headings that they signed up for. However avoid changing the text in headers after volunteering begins because doing so carelessly could redefine slots that volunteers under those headings have signed up for. If you remove rows or columns, any volunteers in those rows or columns are removed and cannot be recovered.

A slot can be in any one of these states:

8pm-10pm	8pm-10pm	8pm-10pm	8pm-10pm	8pm-10pm
name: <input type="text"/>	name: <input type="text" value="Tad Woods"/>	name: <input type="text" value="Tad Woods"/>	name: <input type="text" value="Tad Woods"/>	name: <input type="text" value="Tad Woods"/>
e-mail: <input type="text"/>	e-mail: <input type="text" value="tad@tandtsoftware."/>	e-mail: <input type="text" value="tad@tandtsoftware."/>	e-mail: <input type="text" value="tad@tandtsoftware."/>	e-mail: <input type="text" value="tad@tandtsoftware."/>
phone: <input type="text"/>	phone: <input type="text" value="123-4567"/>	phone: <input type="text" value="123-4567"/>	phone: <input type="text" value="123-4567"/>	phone: <input type="text" value="123-4567"/>
	<input checked="" type="checkbox"/> NOT CONFIRMED		<input checked="" type="checkbox"/> CANCELED N/C	<input checked="" type="checkbox"/> CANCELED
Open	Not Confirmed Slot remains open until volunteer clicks link in confirmation e-mail.	Confirmed	Canceled – Not Confirmed Slot remains taken until volunteer clicks link in confirmation e-mail.	Canceled – Confirmed Slot can be filled by another volunteer.

Volunteers flagged as **NOT CONFIRMED** have not yet clicked the link in their confirmation e-mail to confirm their intent to volunteer. The administrator can uncheck this flag and press **Save** to manually flag the slot confirmed. **Not Confirmed** slots may still be filled by other volunteers; when this happens an e-mail is sent to the original, unconfirmed volunteer notifying him or her that the slot has been taken. Use the **Reminders** button to re-send confirmation e-mails if necessary. If you think a volunteer has provided a mistyped e-mail address then you might want to follow up with the volunteer by phone.

Canceled - Not Confirmed slots remain taken until the cancellation is confirmed.

Canceled - Confirmed slots are effectively Open slots that can be filled by another volunteer. When a volunteer cancels their slot online (and confirms the cancellation by clicking the link in a confirmation e-mail), their name will still appear (only in administrative mode) with a red-checked **CANCELED**. Leave this box checked unless you wish to un-cancel the volunteer.

TIP: By default *i-Volunteer Online™* may intelligently assign volunteers into identical slots. For an explanation of how this works see **SETTING MORE PREFERENCES - EVENTS - Automatically put volunteer in identical slot when selected slot is taken**.

MANAGING EVENTS

COPYING EVENTS

The administrator can copy any event by first administering it and then pressing the **Copy** button. Everything about the event is copied into a new event except for the volunteers in the sign-up sheet. This is a convenient way to repeat a previous event.

REMINDERS

The administrator can send reminder e-mails to all of the volunteers for one event at a time. Currently reminders cannot be scheduled and can only be sent on-demand by the administrator.

To send reminder e-mails, administer the relevant event and press the **Reminders** button. Select who the reminder e-mails should go to: Unconfirmed volunteers, Confirmed volunteers, or both. Check the box "*I AGREE that volunteers for this event are expecting to receive e-mail from [i-Volunteer Online™ on behalf of my organization].*" Then press **Send E-mail Reminders Now**. If your event is large be patient. A report will show who reminder e-mails were sent to.

IMPORTANT: It is important that your volunteers are expecting to receive these e-mails so that no one will mistakenly report the e-mail as SPAM. When e-mail is reported as SPAM that puts your domain, *i-Volunteer Online™* and the SMTP e-mail host at risk for landing on an e-mail *blacklist*. See the LICENSE AGREEMENT for further details regarding e-mail responsibilities.

REPORTS

To run reports for one or more events, administer any event and press the **Reports** button. All of the reports allow the inclusion of multiple events in the output and can be opened in Excel if your browser supports it.

The **Event: Sign-Up Sheet** and the **Event: Sign-up Sheet with Labels** reports provide a concise view of one or more events' sign-up sheets. You can open them to Excel to print them with greater control over the formatting and/or to collect sign-ups off-line. Note there is currently not a way to automatically copy sign-ups collected in a spreadsheet off-line back on-line.

The **Event: One-Slot-Per-Row** report is a detailed report that conveniently separates each field of information into separate and aligned columns for easier sorting and merging in a spreadsheet program like Excel.

LOG

To view the **Volunteer Action Log** for an event, administer the event then press the **Log** button. The Log shows exactly when volunteers signed up, confirmed, canceled, or received system warnings. Use the log to research any difficulties that could arise in the process of signing up volunteers. Note that the log only shows volunteers' actions and not changes an administrator makes to the sign-up sheet in administrative mode.

Visit the Support tab at www.i-volunteeronline.com for additional help and tips.