

## Online Volunteer Center Training

**Please login to your online volunteer center account at:**

**[www.uwwill.org/volunteer.aspx](http://www.uwwill.org/volunteer.aspx)**



Giovanny Valadez

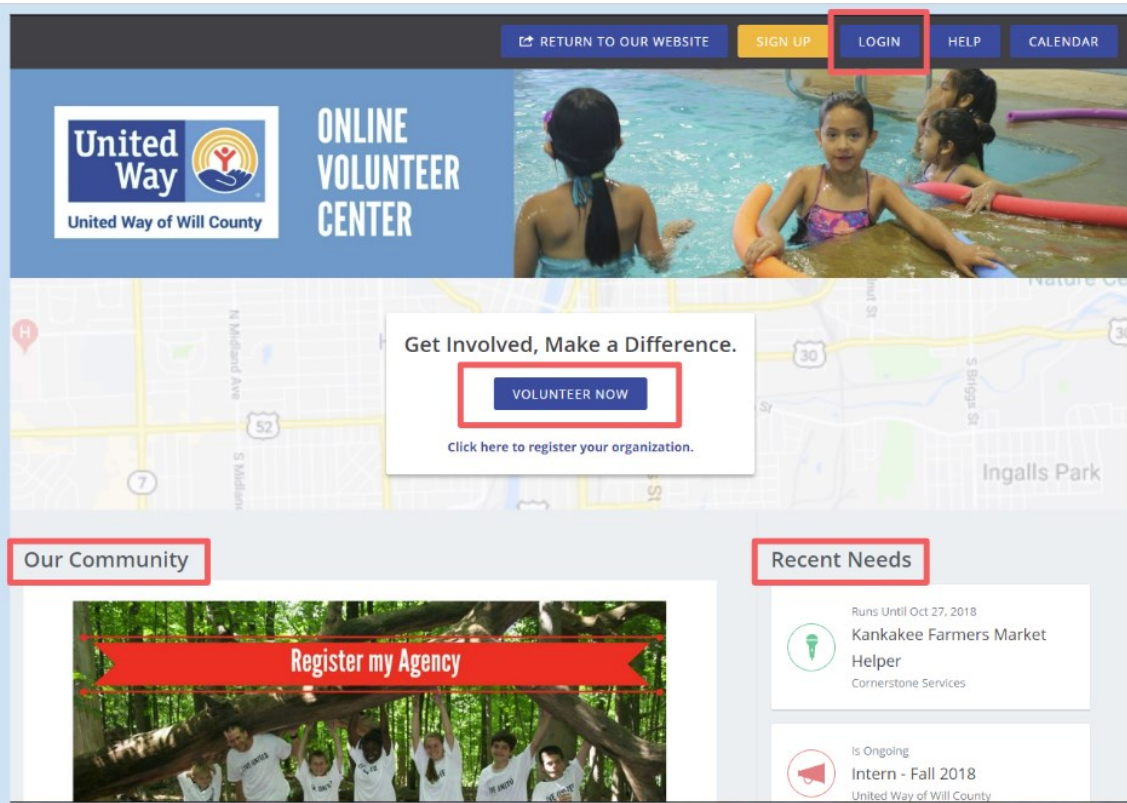
### Speaker Notes:

The online volunteer center serves as an online platform that helps connect community members with local events and volunteer opportunities. The online center allows local agencies to post information about their organization, contact info, and volunteer opportunities. The site serves as a bridge to build upon our community and local agencies and help both parties build a connection.

The first thing you'll see through this aspect of the site is the homepage which introduces the viewer to recent needs, images of community events, and an interactive option that allows them to search for volunteer opportunities in the area.

Notice the highlighted section on the top right of the screen, here agencies and volunteers are able to log in to their accounts.

## Online Volunteer Center



### Speaker Notes:

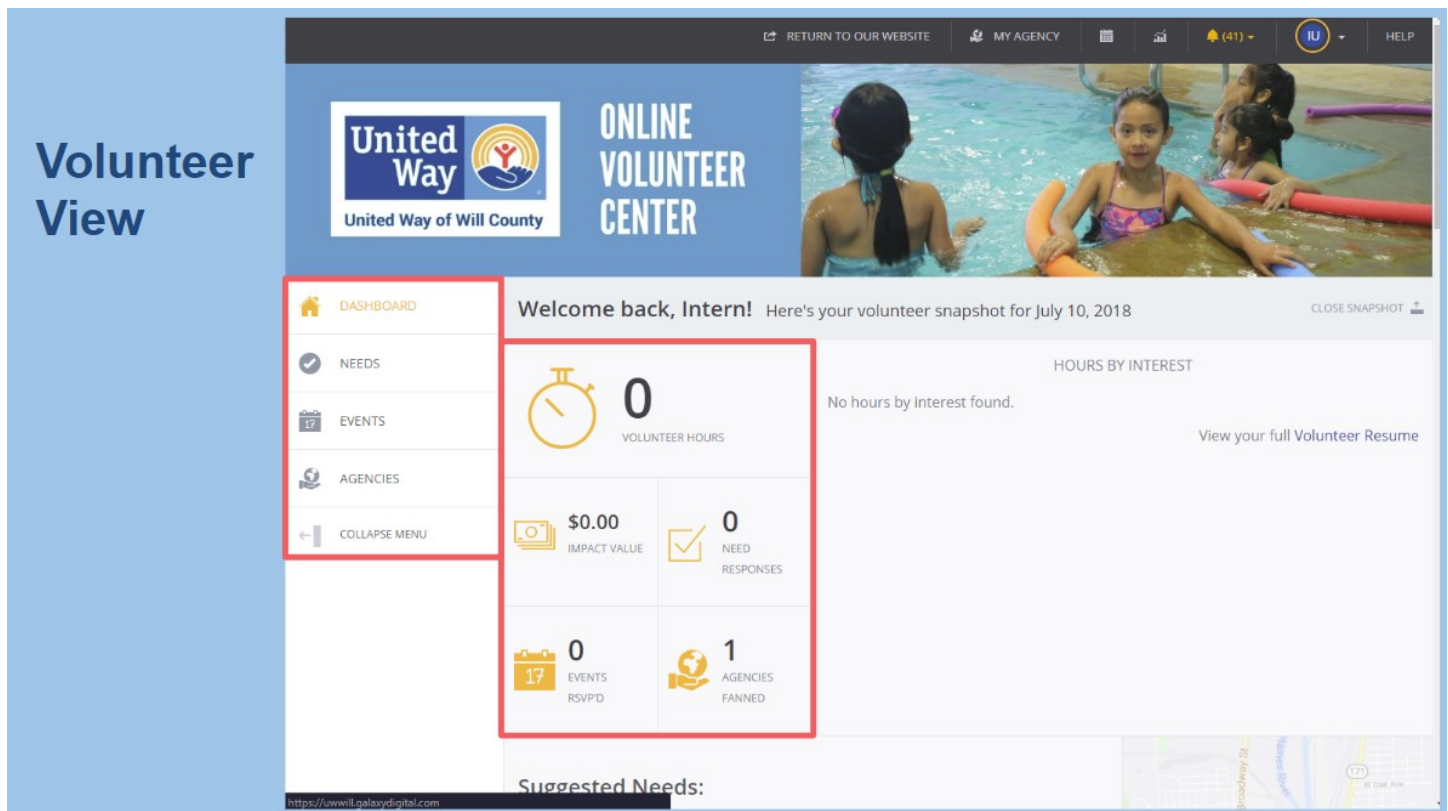
Volunteers and agencies upon logging in are both directed to their dashboard where they are greeted by the center.

There are two sides to the site, the agency and volunteer side. Everything from the volunteer side is created by agencies on their side. As agency managers of the site it's important you understand how the content you create and upload presents itself on the volunteer side. This is the volunteer side of the site which we will walk through first.

The dashboard from the volunteer aspect of the site gives an overview hours completed, their fiscal impact value of service, keep track of responses to listings, and agencies they have fanned.

The option to keep track of fanned agencies allows volunteers to stay well-informed on posts and receive updates on agencies they admire. As a volunteer and agency manager, you can use the side toolbar to move through the site to view listings.

We will go through the volunteer side of the site first, heading down each section of the toolbar as we go.



## Speaker Notes:

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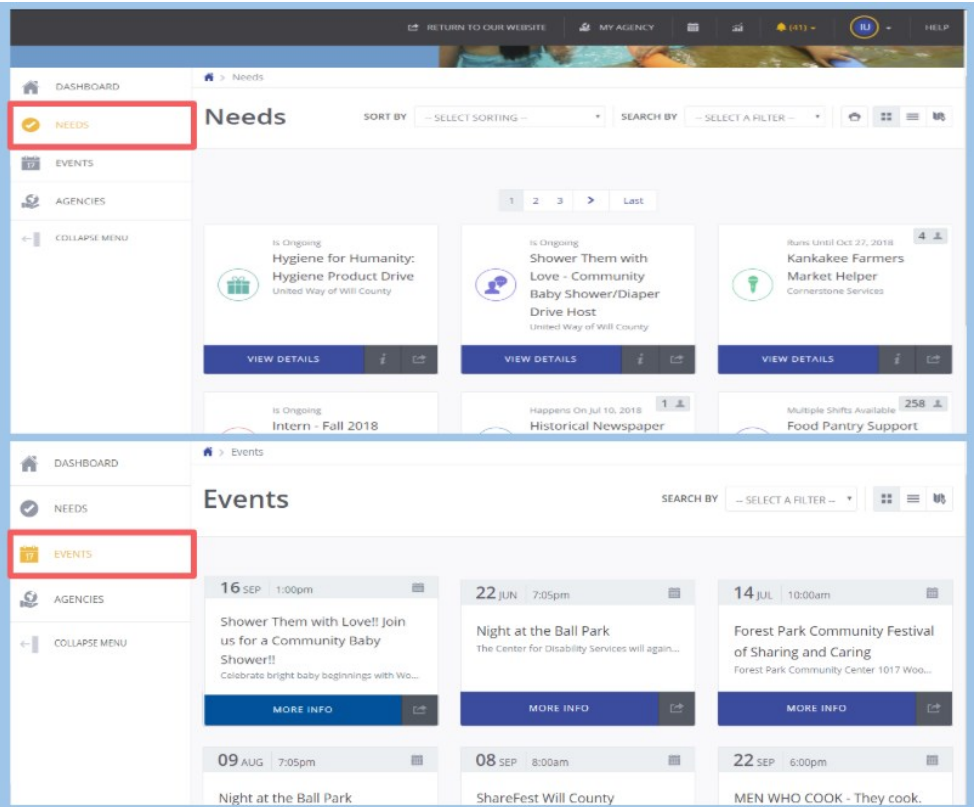
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We will go through the volunteer side of the site first, heading down each section of the toolbar as we go.

## Volunteer View: Needs and Events



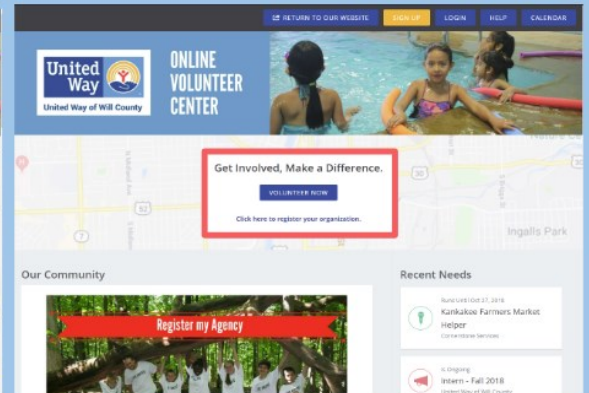
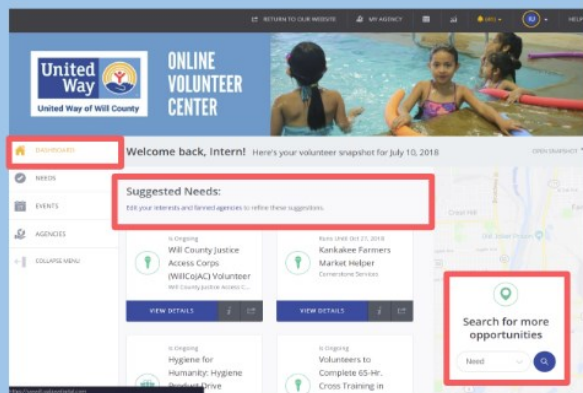
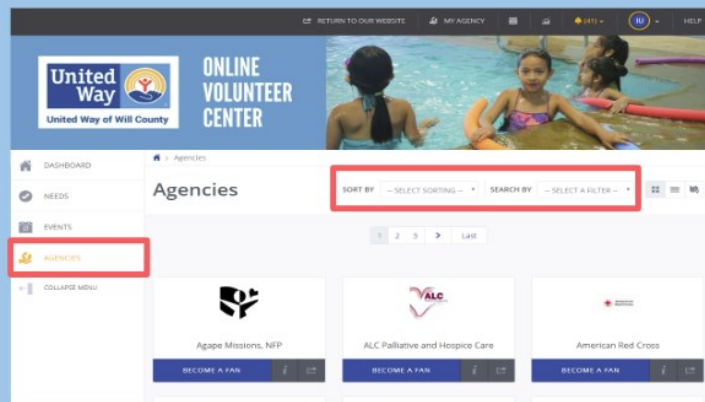
### Speaker Notes:

The next section in the toolbar is “Needs”, this opens a page of all listing classified as a need. An agency need is an opportunity for community members to attend and volunteer. A need serves as a recruitment listing for an agency to attract volunteers. This can easily be confused by agencies with event postings.

Beneath “Needs” is ”Events”, ‘Events” opens a list of upcoming listings in which you can attend. An event listed under an agency is an invitation to attend and become well-informed through functions hosted by local agencies. Do not confuse this with an event that requires volunteers, this would fit under the need listing of an agency.

Volunteers can click on each listing to view more information and details.

## Volunteer View: Agency Posts and Pages



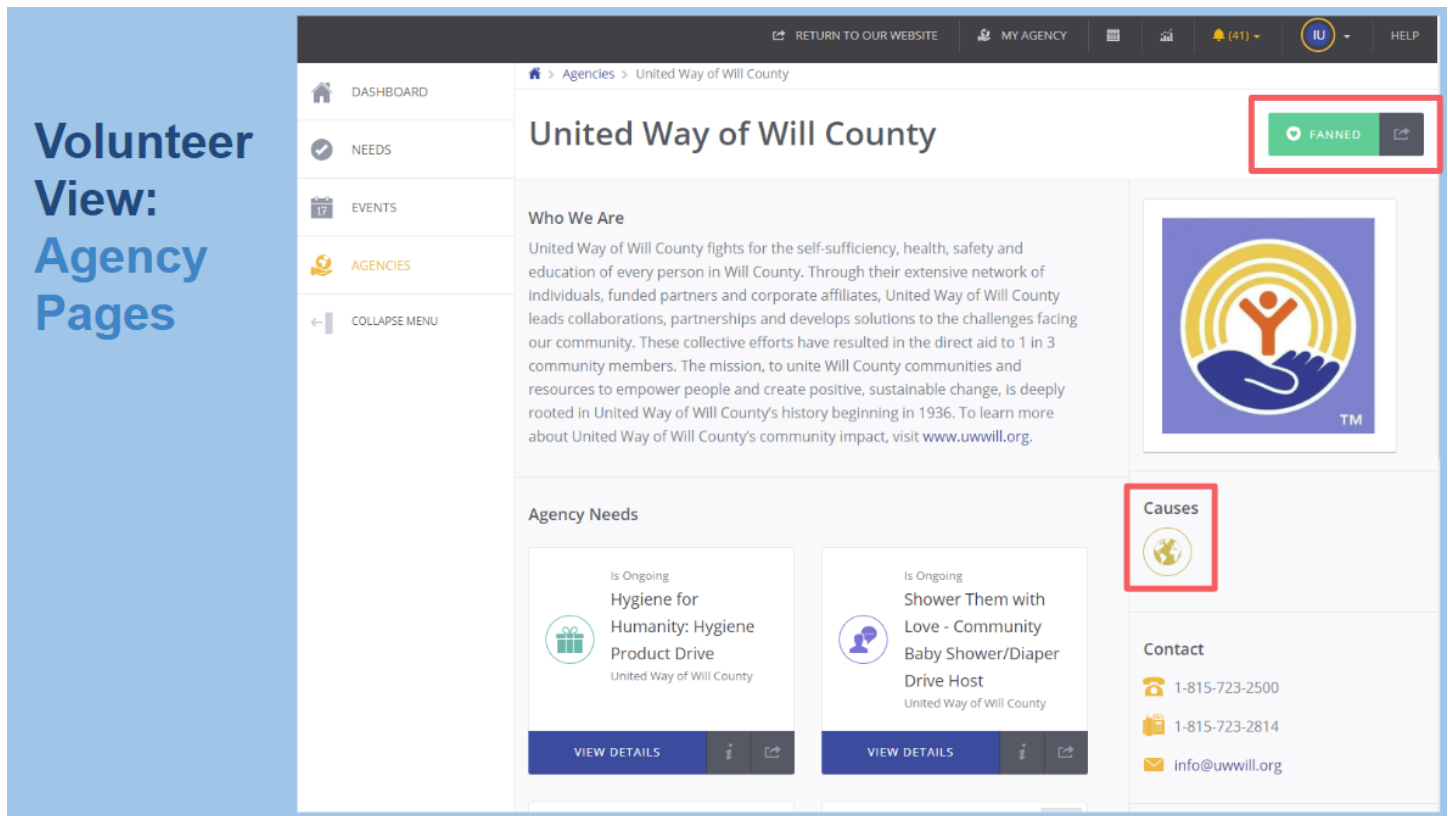
## Speaker Notes:

Volunteers have a few different ways of searching for agencies and finding their specific listings.

The most convenient way to search is through the toolbar. Clicking on the "Agencies" icon in the toolbar redirects to a directory of all agencies with an account on the Online Volunteer Center. You can find the option to search for agencies and filter searches to find by categories such as causes or distance.

The first tab in the toolbar, "Dashboard", brings you back to your snapshot. Further down on the dashboard, volunteers will see suggested needs based on their interests. The dashboard also gives an opportunity to search locally for listings.

The bottom right-hand image is the introductory homepage of the volunteer center. Volunteers do not have to sign-in to search for local events and needs. They can simply click on the volunteer now icon to search for local listings.



## Speaker Notes:

You can search for you agency in the agency directory located under the "Agencies" section of the Toolbar.

Volunteers can go directly to agency pages to view more information about the agency and their needs.

Click on "Fan" if you are not already a fan to get this agency in your suggested needs.


An agency homepage also lists all the causes an agency is listed under. United Way of Will County has one cause listed which is community, this reflects our work with the community in all its aspects.

So, how do you manage your agency page and enter this information as an agency?

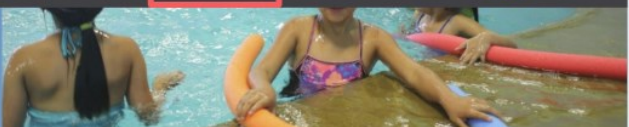


## Agency Manager View: Toolbox

RETURN TO OUR WEBSITE
MY AGENCY
📅
📊
🔔 (41)
👤 IU
HELP




**VOLUNTEER CENTER**



- DASHBOARD
- NEEDS
- EVENTS
- AGENCIES
- COLLAPSE MENU

> Agency Manager > Edit Agency

### United Way of Will County




Click here to open Agency Manager's Toolbox

CLICK HERE FOR OUR GUIDE TO POSTING AND MANAGING VOLUNTEER OPPORTUNITIES!

VIEW
EDIT
NEEDS
EVENTS
STATS
SCHEDULE
TIME TRACKING
VERIFIED VOLUNTEERS

CHECK-IN
CHECKED IN NOW

#### Agency Logo



Upload your logo  
Image should be at least 540px by 540px

UPLOAD LOGO
REMOVE

#### Agency Managers

YOUNG, SAMANTHA

OPRZEDEK, SARAH ★

STALEY, SCHUYLER

YAKSICH, LOREN

UWWC, INTERN

## Speaker Notes:

To access your agency's agency manager view you will have to head to the top right of your screen. You will see the “My Agency” icon, clicking on it redirects you to the agency manager view.

Agency manager view is your agencies control operations, allowing authorized users to manage their agency accounts. Agency managers are given a toolbox with the options to manage their agency's page, add/delete/edit events and needs, stats on agency page interactions, a schedule showing upcoming needs and user sign-ups, and time tracking of volunteer hours. These options allow managers to keep track of volunteers and their commitments to agencies.

When you first login, the toolbox automatically directs you to the “Edit” section of the toolbar which allows you to enter and control the aspects you want volunteers to see about your agency. You will also see listed those who have access to your agency’s page listed under agency managers.

## Agency Manager: Edit Homepage


**Protip:** Set up “jump link” on your website for a customizable link.  
Example:  
[uwwill.org/volunteer.aspx](http://uwwill.org/volunteer.aspx)

Dashboard
OPPORTUNITIES!

VIEW **EDIT** NEEDS EVENTS STATS SCHEDULE TIME TRACKING VERIFIED VOLUNTEERS

CHECK-IN CHECKED IN NOW

### Agency Logo



Upload your logo

Image should be at least 540px by 540px

UPLOAD LOGO
REMOVE

### Agency Managers

YOUNG, SAMANTHA

OPRZEDEK, SARAH ★

STALEY, SCHUYLER

YAKSICH, LOREN

UWWC, INTERN

Basic Information

Agency Name \*

Customize Link

Contact Information

Email

Phone

## Speaker Notes:

You can enter and update contact information, basic information, and location for your profile on the Online Volunteer Center

Place volunteer coordinator or best person for volunteers to contact under “contact information”.







This space not for posting or editing volunteer opportunities.

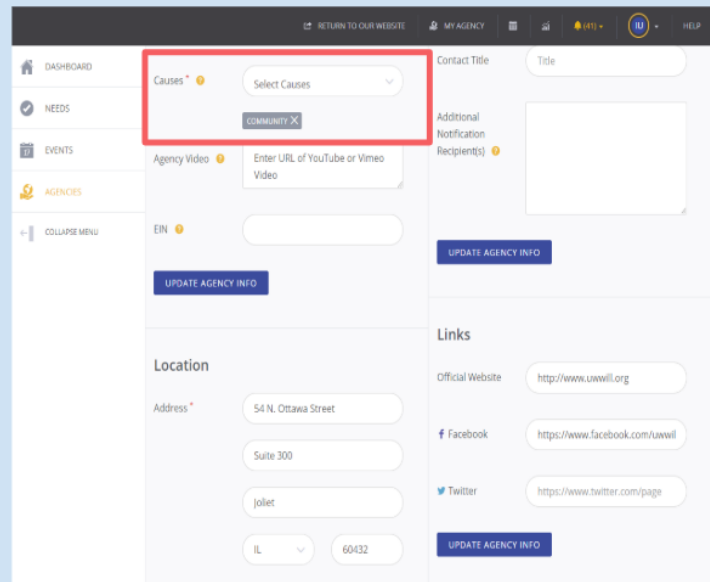
“Customize Link” allows you to create your own link to use to send your volunteers to your agency’s page. However, this is a long link and it is not easy to say. **Protip:** Set up “jump link” on your website to easily share your agency’s online volunteer center page. Example: **www.yourwebsite.com/volunteer**



## Agency Manager: Edit Homepage: Causes

A standardConnect site features the 16 causes listed below, each associated with the icon shown. If your site manager has added custom causes and/or removed some of the default ones, the causes and icons available to you may not match those shown here.

Icon	Cause	Types of Agencies
	Arts and Culture	art centers; music, theatre, and other performance groups; arts education; museums;
	Basic Needs	shelters; food banks; clothing donations; nonprofit thrift shops
	Community	cultural awareness; assistance for vision- or hearing-impaired; scouting; animal shelter and adoption
	Crime & Safety	law enforcement; community watch
	Crisis	domestic violence; drug treatment; hotlines
	Disaster Response	Red Cross; disaster and relief services



The screenshot shows the Agency Manager dashboard. The 'Causes' section is highlighted with a red box. It includes a 'Select Causes' dropdown menu and a 'COMMUNITY X' button. Below this, there are fields for 'Agency Video' (with a URL input), 'EIN' (with a text input), and 'Location' (with address, suite, city, state, and zip code inputs). There are also buttons for 'UPDATE AGENCY INFO' and 'UPDATE AGENCY INFO'.

### Speaker Notes:

When creating your agency account one of the steps is to select “Causes” that are relative to your agency. This allows for volunteers to match their searches to agencies. Selecting the proper causes will allow volunteers to make the right choice in finding an agency with causes they are passionate about.

In your agency managers toolbox, the “Guides” section has the information in the right image; this section also gives various guides on how to utilize the center. It gives a guide on the different causes and examples of the type of agencies associated with causes. It is important to associate the correct causes with your agency to avoid any confusion on what your agency does.

You can select more than one cause or edit the causes you have already on this page.

# Agency Manager: Edit Homepage

RETURN TO OUR WEBSITE

MY AGENCY

(41)

U

HELP

DASHBOARD

NEEDS

EVENTS

AGENCIES

COLLAPSE MENU

Causes <sup>\*</sup> ⓘ

Select Causes

COMMUNITY X

Agency Video ⓘ

Enter URL of YouTube or Vimeo Video

EIN ⓘ

UPDATE AGENCY INFO

Location

Address <sup>\*</sup>

54 N. Ottawa Street

Suite 300

Joliet

IL

60432

UPDATE AGENCY INFO

Contact Title

Title

Additional Notification Recipient(s) ⓘ

UPDATE AGENCY INFO

Links

Official Website

http://www.uwwill.org

Facebook

https://www.facebook.com/uwwill

Twitter

https://www.twitter.com/page

UPDATE AGENCY INFO

## Speaker Notes:

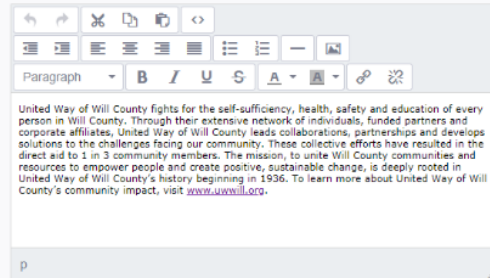
The “Edit” section allows for you to add your agency’s address. Make sure this address reflects YOUR agency’s location and not United Way of Will County’s address or any other off-site address.

This section also allows for the option to link external websites to your agency page. You can also add links to your agency’s Facebook and Twitter accounts. In order to do is, copy and paste the URL from you agency’s social media accounts and place them here. The volunteer center will then let you upload those links to your agency’s homepage where volunteers and visitors will be able to follow the link to your accounts.

## Agency Manager: Edit Homepage

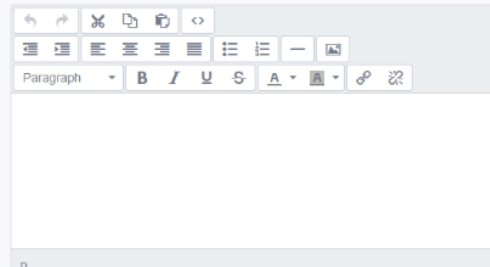
### Descriptions

Who We Are ⓘ



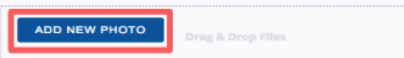
A rich text editor interface for the 'Who We Are' section. It features a toolbar with icons for undo, redo, bold, italic, underline, strikethrough, bulleted list, numbered list, decrease indent, increase indent, link, and unlink. Below the toolbar is a dropdown menu set to 'Paragraph'. The text area contains a paragraph about United Way of Will County, mentioning its mission and history, with a link to [www.uwwill.org](http://www.uwwill.org). The text is followed by a small 'p' icon.

What We Do ⓘ



A rich text editor interface for the 'What We Do' section. It features a toolbar with icons for undo, redo, bold, italic, underline, strikethrough, bulleted list, numbered list, decrease indent, increase indent, link, and unlink. Below the toolbar is a dropdown menu set to 'Paragraph'. The text area is currently empty, followed by a small 'p' icon.

Photos ⓘ



A photo upload area with a red-bordered button labeled 'ADD NEW PHOTO' and a text prompt 'Drag & Drop Files'.

### Speaker Notes:

Your profile is only as good as you make it. It is vital in this section of the site that you enter as much quality information about your agency as you can, usually agencies put their boilerplate in this space. Volunteers may be interacting with your agency for the first time through the volunteer center. They should leave understanding your organization. Strive to incorporate your mission and values into your description, creating a personality and a sense of who your agency is. This helps your agency by bringing visibility into what you do and who you serve.

It is also beneficial to incorporate images from your agency and activities into your agency's homepage; giving a glance into the people and activities surrounding your agency. The option to upload images is beneath the description boxes further down the screen.

## Agency Manager: Needs

The screenshot displays the 'United Way of Will County' Agency Manager interface. The left sidebar contains navigation links: DASHBOARD, NEEDS, EVENTS, AGENCIES, and a COLLAPSE MENU. The top navigation bar includes links for RETURN TO OUR WEBSITE, MY AGENCY, and a notification bell with 41 alerts. The main content area is titled 'United Way of Will County' and features a red banner with a wrench icon and the text 'Click here to open Agency Manager's Toolbox'. Below this, a horizontal menu has 'NEEDS' highlighted with a red box. Under 'NEEDS', there are sub-links: VIEW, EDIT, CHECK-IN, CHECKED IN NOW, EVENTS, STATS, SCHEDULE, TIME TRACKING, and VERIFIED VOLUNTEERS. The 'Manage Needs' section includes action buttons: ACTIONS, EXPORT RESPONSES, EXPORT NEEDS, and SHOW INACTIVE. A red box highlights the 'ADD NEW NEED' button. Below the buttons is a pagination bar showing '1 2 3 > Last'. A table filter icon is located to the right of the table. The table lists two needs:

ID	NEED TITLE	PRIVACY	INITIATIVE	DATE	ADDED	STATUS
351571	Intern - Fall 2018 <a href="#">Edit</a>   <a href="#">Responses</a>   <a href="#">View</a>	Public	Is Ongoing		Jun 22, 2018	Active
348879	Mobile Food Pantry - Monee (Second Place Church)	Public	Happens On Jun 29, 2018		Jun 7, 2018	Active

### Speaker Notes:

Return to your agency and head to the section on the toolbox listed as, "Needs". It is under this header that you are can input and manage your needs/volunteer opportunities.

Click on the "Add New Need/Event" and you will be redirected to the template to create and upload a new listing.

## Agency Manager: Adding a Need

The screenshot shows the 'Create Need' form in the Agency Manager interface. The form is titled 'Create Need' and is located on the right side of the screen. The left side of the screen shows a sidebar with navigation links: DASHBOARD, NEEDS, EVENTS, AGENCIES, and a COLLAPSE MENU button. The top of the screen has a dark header with links for RETURN TO OUR WEBSITE, MY AGENCY, and a user profile icon. The form fields are as follows:

- Title \***: A text input field.
- Description \***: A rich text editor with a toolbar and a text area.
- Privacy \***: Radio buttons for Public (selected) and Private.
- Duration \***: A dropdown menu, highlighted with a red box.
- Capacity \***: A text input field with an example value of 30.
- Require Background Check?**: A checkbox with a link to get started.

### Speaker Notes:

Fill out some of the basic information such as a title for the opportunity. Titles should not include your agency's name as it will already be listed under the opportunity. The title should be about what the position does. Do not title it "Volunteer opportunity."

Bring your attention to the "Duration" field in the creating a need section. This option opens a drop-box that lets you set the time of the opportunity; the options to choose from are: an ongoing opportunity, custom or recurring shifts, runs until a certain date, or is a one day opportunity.

- Ongoing - For needs that do not have an expiration date, do not have pre-scheduled date, and do not occur in shifts.
- Runs Until - For needs that are ongoing for a limited time and have a definite "end date."
- Happens On - For volunteer opportunities that occur on a particular date.
- Recurring Shifts - For needs that occur in shifts and occur at the same time daily, weekly, or monthly
- Custom Shifts - For needs that occur in shifts that occur at different times within the same day, or at different times on different days.

You have the option to clone needs in order to be able to list different shifts and days, we will talk about this further into the presentation.

## Agency Manager: Adding a Need

RETURN TO OUR WEBSITE

MY AGENCY

(41)

10

HELP

DASHBOARD

NEEDS

EVENTS

AGENCIES

COLLAPSE MENU

Minimum Age ⓘ

Maximum Age ⓘ

Family Friendly? ☐ Yes ☐ No

Outdoors? ⓘ ☐ Yes ☐ No

Wheelchair Accessible ⓘ ☐ Yes ☐ No

Attributes ⓘ

Address ⓘ

Address Line 1

Address Line 2

City

Pick a state

Zip Code

### Speaker Notes:

Template includes question mark icons with further assistance and examples on what to input in to sections.



## Agency Manager: Adding a Need

Minimum Age ?

Maximum Age ?

Family Friendly? ☐ Yes ☐ No

Outdoors? ? ☐ Yes ☐ No

Wheelchair Accessible ? ☐ Yes ☐ No

Attributes ?

Address ?

Address Line 1

Address Line 2

City

Pick a state

Zip Code \* ?

### Speaker Notes:

Add specifications or details on the opportunity that are helpful for volunteers and will provide information on the opportunity you are creating.

The “Attributes” section is one section that is explained as an additional section to add details on the opportunity such as, “Snacks will be provided” or “wear closed-toe shoes”.

The “Address” section is for your agency to list the address of where the need/volunteer opportunity will take place. This can be your agency location, but should not be listed as your agency’s location if the need is off-site. This is where you want volunteers to report to on the day of the opportunity.

## Agency Manager: Adding a Need

The screenshot shows the 'Adding a Need' form in the Agency Manager interface. The form includes a sidebar with navigation links: DASHBOARD, NEEDS, EVENTS, AGENCIES, and a COLLAPSE MENU. The main form area contains the following fields and controls:
















- City:** A text input field.
- Pick a state:** A dropdown menu.
- Zip Code:** A text input field.
- Interests & Abilities:** A dropdown menu labeled 'Select Interests', which is highlighted with a red box.
- Additional Notification Recipient(s):** A section with a toggle switch set to 'OFF' and a text input field containing 'email@example.com'.
- Waiver:** A section with a 'Choose File' button and the text 'No file chosen'.

At the bottom of the form are two buttons: 'CREATE NEED' (in blue) and 'CANCEL' (in white). The footer of the page includes a Facebook icon, a 'PRIVACY POLICY' link, and the 'galaxy' logo.

### Speaker Notes:

Further down the screen you will see additional fields to fill out such as “Interests & Abilities”. More information on these are on the next slide.

## Agency Manager: Adding a Need: Interests

Icon	Interest	Typical Opportunities/Needs
	Advocacy	outreach coordinators; speakers; letter-writing; organizing; education; research; rallies; voter education; lobbying; legal; attending public meetings; community forums; phone bank
	Board Service	advisory board; executive board; committee service
	Clerical	customer service; office duties; grant writing
	Court-Mandated	court-mandated volunteer work
	Education	tutoring; arts instruction; homework help; training; reading/literacy; STEM; mentoring
	Finance	financial planning; tax preparation; financial coaching
	Food Prep	meal preparation; hunger relief
	Legal	legal
	Marketing	social networking; phone calls; developing/disseminating flyers, brochures, and other marketing tools
	Medical	first-aid classes; healthcare/hospice
	Nonprofit Professional	internships; finance; seasonal; full-time and part-time; development; AmeriCorps; clerical; program; contract; executive
	Physical Labor	construction work; home repairs; painting; cleaning; transportation; garden work
	Skilled Labor	construction; painting; home repairs; electrician; nursing; carpentry; maintenance
	Social	event planning; client interaction; fundraising; bilingual/Spanish speaking
	Technology	computer use; social media; web design/development; other software

### Speaker Notes:

You need to associate your need with one or more ***“Interest”***. *Interests are used to match opportunities with what appeals to each volunteer.*

If a volunteer has certain skills or wishes to work within a certain area, matching the **correct interests will needs will result in better compatibility.**

For example, a volunteer skilled in “Finance” and looking to volunteer in Finance would not be found under “Physical labor.” If you need boxes moved inside an office, this would be under “Physical labor” not “Clerical work”.

## Agency Manager: Adding a Need

RETURN TO OUR WEBSITE MY AGENCY (41) IU HELP

DASHBOARD NEEDS EVENTS AGENCIES COLLAPSE MENU

City

Pick a state

Zip Code \*

Interests & Abilities \*

Select Interests

Additional Notification Recipient(s)

OFF

email@example.com

Waiver \*

Choose File No file chosen

CREATE NEED CANCEL

f PRIVACY POLICY galaxy

### Speaker Notes:

Creating a need includes for uploading “Waivers”, do this ahead of time to insure that volunteers receive and complete them before their scheduled shift.

After filling out the need information click on “Create Need” to post.

The steps we used for creating and posting a Need are the same as when creating an Event.

## Agency Manager: Editing a Need

The screenshot shows the 'United Way of Will County' Agency Manager interface. The left sidebar contains navigation links: DASHBOARD, NEEDS, EVENTS, AGENCIES, and a COLLAPSE MENU. The top navigation bar includes links for RETURN TO OUR WEBSITE, MY AGENCY, and a user profile icon. The main content area is titled 'Manage Needs' and features a table of needs. The 'NEEDS' tab in the top navigation is highlighted with a red box. The table lists two needs: 'Intern - Fall 2018' and 'Mobile Food Pantry - Monee (Second Place Church)'. The 'Edit' button for the first need is highlighted with a red box.

United Way of Will County

Click here to open Agency Manager's Toolbox

CLICK HERE FOR OUR GUIDE TO POSTING AND MANAGING VOLUNTEER OPPORTUNITIES!

VIEW EDIT **NEEDS** EVENTS STATS SCHEDULE TIME TRACKING VERIFIED VOLUNTEERS

CHECK-IN CHECKED IN NOW

Manage Needs

ACTIONS EXPORT RESPONSES EXPORT NEEDS SHOW INACTIVE ADD NEW NEED

1 2 3 > Last

Table Filter

<input checked="" type="checkbox"/>	ID	NEED TITLE	PRIVACY	INITIATIVE	DATE	ADDED	STATUS
<input checked="" type="checkbox"/>	351571	Intern - Fall 2018 <a href="#">Edit</a> <a href="#">Responses</a>   <a href="#">View</a>	Public		Is Ongoing	Jun 22, 2018	Active
<input checked="" type="checkbox"/>	348879	Mobile Food Pantry - Monee (Second Place Church)	Public		Happens On Jun 29, 2018	Jun 7, 2018	Active

### Speaker Notes:

You have the option to edit an opportunity once you have posted it.

In the "Agency Manager Toolbox", based on the opportunity click to either "Need" or "Event". Scroll down to the listing and click "Edit" under that listing and you will be redirected.

# Agency Manager: Editing a Need

The image displays two side-by-side screenshots of the Agency Manager web application interface, specifically the 'Update Need' form.

**Left Screenshot (Update Need Form):**

- Navigation:** A sidebar on the left contains links for DASHBOARD, NEEDS, EVENTS, AGENCIES, and a COLLAPSE MENU.
- Form Fields:**
  - Title:** A text input field containing 'Intern - Fall 2018'.
  - Description:** A rich text editor with a toolbar and a text area containing placeholder text about 'Operations Intern'.
  - Privacy:** Radio buttons for 'Public' (selected) and 'Private'.
  - Duration:** A dropdown menu set to 'Is Ongoing'.
  - Require Background Check?** A checkbox with a yellow dot icon.
- Buttons:** A blue 'UPDATE NEED' button is highlighted with a red box.

**Right Screenshot (Additional Notification):**

- Additional Notification Recipient(s):** A text input field containing 'Samantha@uwvill.org'.
- Waiver:** A checkbox with a yellow dot icon.
- Buttons:** A red 'CLONE NEED' button and a red 'DEACTIVATE NEED' button are highlighted with red boxes.
- User Groups:** A section titled 'User Groups' with an 'ADD USER GROUP' button and a table with columns: TITLE, MEMBERS, DATE ADDED, STATUS, and OPTIONS.

## Speaker Notes:

You can edit a need here on this page. The “Update Need” template follows that of the “Create Need”.

If you wish to deactivate your need, then you can click on the red “Deactivate” icon here. This allows it to be removed from volunteers view, but you can still access the listing and reactivate through the agency manager side.

Clicking on the “Clone” icon, it will copy and recreate the need/event. It will appear as it does on the update need page with “(copy)” in the title section, you can modify it to fit new times or locations. In the new listing, the “Update Need” icon will change to “Create need” to post the newly cloned need/event.

Once you have modified the new need, click “Update Need” to post newly modified need.



# Agency Manager: Sharing a Need

The left screenshot shows the 'United Way of Will County' Agency Manager interface. The 'NEEDS' tab is selected in the top navigation bar. Below the 'Manage Needs' section, there is a table of needs. The first row is 'Intern - Fall 2018' with a 'View' button highlighted. The table has columns for ID, Need Title, Privacy, Initiative, Date, Added, and Status.

ID	NEED TITLE	PRIVACY	INITIATIVE	DATE	ADDED	STATUS
351571	Intern - Fall 2018	Public	Is Ongoing	Jan 22, 2018	Active	
348579	Mobile Food Pantry - Monree Second Place Church	Public	Happens On Jan 22, 2018	Jan 7, 2018	Active	

The right screenshot shows the details of the 'Intern - Fall 2018' need. The 'Share Need' button is highlighted in the top right corner. The page includes a description of the need, the organization's mission, and a list of interests.

## Speaker Notes:


The Online Volunteer Center aids in promoting your needs by allowing you to share them across multiple platforms.

To get to the need you wish to share, go to the “Need” section of the toolbox and click on “View” under the need you wish to share.

The listing for the need will appear in volunteer view with all the information you created.

On the right hand side, the option to “Share” will create a drop box with various platforms you can select.

## Agency Manager: Needs: Managing Volunteer Responses


 Click here to open Agency Manager's Toolbox

CLICK HERE FOR OUR GUIDE TO POSTING AND MANAGING VOLUNTEER OPPORTUNITIES!

[VIEW](#) [EDIT](#) [NEEDS](#) [EVENTS](#) [STATS](#) [SCHEDULE](#) [TIME TRACKING](#) [VERIFIED VOLUNTEERS](#)

[CHECK-IN](#) [CHECKED IN NOW](#)

Manage Needs

ACTIONS 

[EXPORT RESPONSES](#) [EXPORT NEEDS](#) [SHOW INACTIVE](#) [ADD NEW NEED](#)

1 2 3 > Last

Table Filter

<input type="checkbox"/>	ID	NEED TITLE	PRIVACY	INITIATIVE	DATE	ADDED	STATUS
<input checked="" type="checkbox"/>	348879	Mobile Food Pantry - Monee (Second Place Church) <a href="#">Edit</a> <a href="#">Responses</a> <a href="#">View</a>	Public		Happens On Jun 29, 2018	Jun 7, 2018	Active
<input checked="" type="checkbox"/>	344543	Historical Newspaper Scanning and Archiving 6/20/18 <a href="#">Edit</a>   <a href="#">Responses</a>   <a href="#">View</a>	Public		Happens On Jun 20, 2018	May 16, 2018	Active

Historical Newspaper Scanning and

### Speaker Notes:

Returning to agency manager view and the “Need” section of the tool box, you are able to view volunteer sign-ups.

Scroll down the list of Events/Needs to select the listing you wish to view and click “Responses”.

## Agency Manager: Needs: Managing Volunteer Responses

**Responses**

ACTIONS: EXPORT RESPONSES + ADD DEFAULT HOURS MESSAGE RESPONDERS HIDE EXPIRED

USER	TEAM	BEGINS	OPTIONS
J'nae	Kirby Keepers	Jan 15, 2018 @ 12:00am	⌚ X
Lynn	Kirby Keepers	Jan 15, 2018 @ 12:00am	⌚ X
Maria		Jun 29, 2018 @ 12:00am	⌚ X
Carmen	Crete-Monee School District 201U	Jun 29, 2018 @ 12:00am	⌚ X
Reserved Slot	Crete-Monee School District 201U	Jun 29, 2018 @ 12:00am	⌚ X
Reserved Slot	Crete-Monee School District 201U	Jun 29, 2018 @ 12:00am	⌚ X
Reserved Slot	Crete-Monee School District 201U	Jun 29, 2018 @ 12:00am	⌚ X
Reserved Slot	Crete-Monee School District 201U	Jun 29, 2018 @ 12:00am	⌚ X
Dorothy	Amazon MDW7	Jun 29, 2018 @ 12:00am	⌚ X
Reserved Slot	Amazon MDW7	Jun 29, 2018 @ 12:00am	⌚ X

### Speaker Notes:

Lists of volunteers who have enrolled will appear. Scroll further down and you may see a “Waitlist” of volunteers interested in attending if all spots are full.

You can “Message Responders” here by heading to the top of the page. This a great tool that helps you keep in contact and reach out to volunteers.

The “Stopwatch Icon” next to each response allows you input hours for volunteers even after the opportunity has passed.

## Agency Manager: Needs: Exporting Volunteer Responses

The screenshot displays the 'Responses' window in the Agency Manager application. The window has a title bar with 'RETURN TO OUR WEBSITE', 'MY AGENCY', and 'HELP' links. Below the title bar, there's a 'Table Filter' dropdown. The main content is a table with columns: USER, TEAM, BEGINS, and OPTIONS. The table lists several responses, including individual users like J'nae, Lynn H, Maria, and Carmen, as well as 'Reserved Slot' entries, all associated with teams like 'Kirby Keepers' and 'Crete-Monee School District 201U'. The 'OPTIONS' column contains icons for editing and deleting each response. At the bottom of the window, a dark bar shows a download notification: 'Need Responses E...csv' with a small icon and an upward arrow.

USER	TEAM	BEGINS	OPTIONS
J'nae	Kirby Keepers	Jan 15, 2018 @ 12:00am	[Edit] [X]
Lynn H	Kirby Keepers	Jan 15, 2018 @ 12:00am	[Edit] [X]
Maria		Jun 29, 2018 @ 12:00am	[Edit] [X]
Carmen	Crete-Monee School District 201U	Jun 29, 2018 @ 12:00am	[Edit] [X]
Reserved Slot	Crete-Monee School District 201U	Jun 29, 2018 @ 12:00am	[Edit] [X]
Reserved Slot	Crete-Monee School District 201U	Jun 29, 2018 @ 12:00am	[Edit] [X]
Reserved Slot	Crete-Monee School District 201U	Jun 29, 2018 @ 12:00am	[Edit] [X]
Reserved Slot	Crete-Monee School District 201U	Jun 29, 2018 @ 12:00am	[Edit] [X]
Dorothy	Amazon MDW7	Jun 29, 2018 @ 12:00am	[Edit] [X]
Reserved Slot	Amazon MDW7	Jun 29, 2018 @ 12:00am	[Edit] [X]

### Speaker Notes:

On the same page, volunteer “Responses,” you can export the list of responses to your computer. Click on “Export Responses.” You can then utilize the list for further documentation or record keeping.

The export of responses will download as an Excel document on the device you are using, the download will appear on the bottom of your screen.

## Agency Manager: Time Tracking: Managing Volunteer Hours

The screenshot displays the Agency Manager interface. The top navigation bar includes links for RETURN TO OUR WEBSITE, MY AGENCY, and a user profile icon. The left sidebar contains a menu with DASHBOARD, NEEDS, EVENTS, and AGENCIES. The main content area is titled "TIME TRACKING" and includes a "Volunteer Hours" section with buttons for ACTIONS, APPROVE, and DENY. Below this is a table with columns for DATE, VOLUNTEER, TEAM, DETAILS, HOURS, STATUS, and SOURCE. The table currently shows "No pending hour entries." A red box highlights the "Volunteer Hours" section and the table. Another red box highlights the "Hour Details" form, which includes fields for Date Volunteered, Hours Worked, Miles Traveled, and a Description. The form also has a "SUBMIT HOUR ENTRY" button.

### Speaker Notes:

The “Time Tracking” section under the “Agency Manager Toolbox” allows agencies and volunteers to manage volunteer hours. Go here to view and to manage volunteer hours.

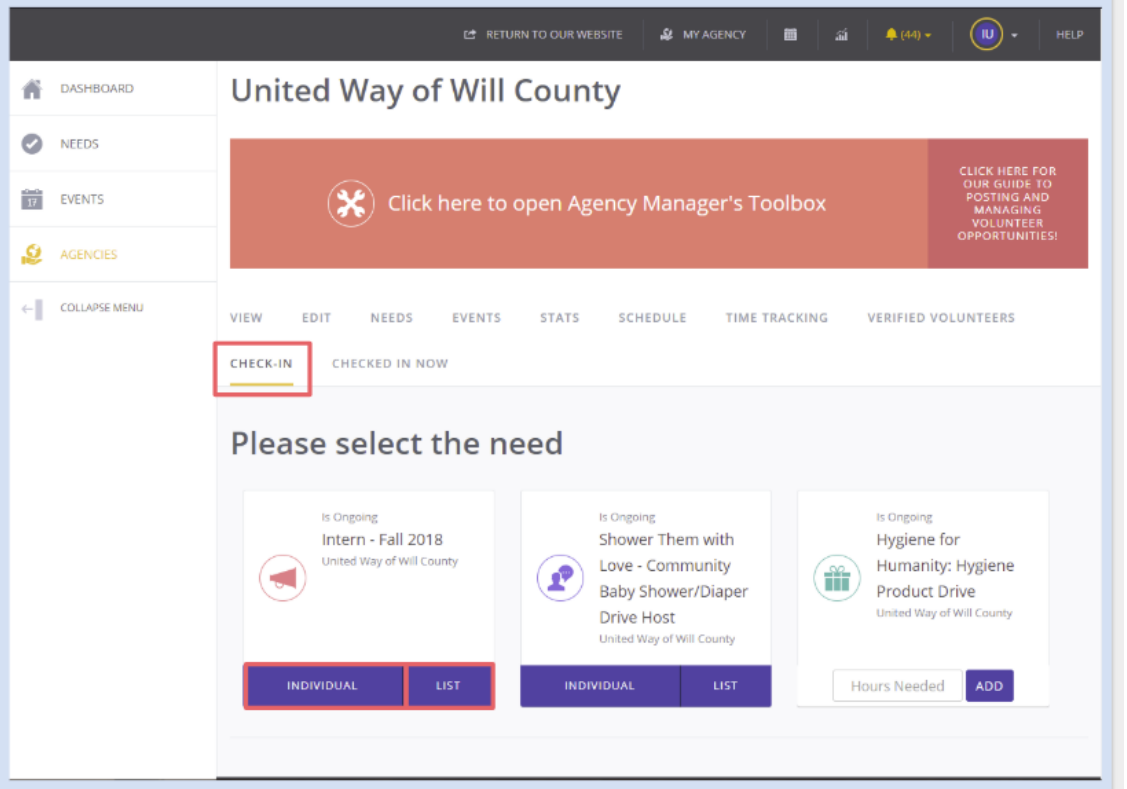
Volunteer hours must be approved by an agency manager for the volunteer to receive credit for their work in responding to a need. You will have to select the volunteer hours as they appear, the site allows you to approve multiple request at a time.

Agency managers can also manually input hours for volunteers who responded to a need. The Need section on this page opens a drop box with recent needs from all over the community. The “Need Dropdown” opens a list of all needs posted, future and past.

After selecting the need, a list of volunteers who signed up will appear. Select the volunteer you are inputting hours for.

You must then enter the volunteer information such as hours worked, date, and can add a description of their work.

## Agency Manager: Check-in: Managing Volunteer Hours



### Speaker Notes:

The Online Volunteer Center helps check-in volunteers when a need occurs. This allows for agency managers or volunteer coordinators to immediately check in volunteers to easily manager their hours.

You will have to be under the “Check-In” section of the toolbox, where a list of upcoming or ongoing needs will appear.

you have the option to enter volunteers “individually” or in a bulk “list”. The list option shows you a list of volunteers who responded to the need and allows you to select which to check-in.



# Agency Manager: Check-in: Managing Volunteer Hours

RETURN TO OUR WEBSITE

MY AGENCY

(45)

IU

HELP

DASHBOARD

NEEDS

EVENTS

AGENCIES

COLLAPSE MENU

## United Way of Will County

Click here to open Agency Manager's Toolbox

CLICK HERE FOR OUR GUIDE TO POSTING AND MANAGING VOLUNTEER OPPORTUNITIES!

VIEW

EDIT

NEEDS

EVENTS

STATS

SCHEDULE

TIME TRACKING

VERIFIED VOLUNTEERS

CHECK-IN

CHECKED IN NOW

### Bulk Check-in for "Shower Them with Love - Community Baby Shower/Diaper Drive Host"

CHECK IN USERS

<input type="checkbox"/>	NAME	EMAIL	TEAM	CHECKED IN
<input type="checkbox"/>	Stephen	gmail.com		No

CHECK IN USERS

## Speaker Notes:

This is the list of volunteers who responded to your need. You can check these in by clicking next to the name of the individual.

You will click on the icon, "Check in Users" to clock in volunteers and log in their check in time.

## Agency Manager: Check-in: Logging Volunteer Hours

**Protip:** Set up a computer and have volunteers check themselves in on this screen.

United Way  
United Way of Will County

ONLINE  
VOLUNTEER  
CENTER

Check-in for "Intern - Fall 2018"

Enter your email address to get started.

Email

FIND MY ACCOUNT

United Way  
United Way of Will County

ONLINE  
VOLUNTEER  
CENTER

Check-in for "Intern - Fall 2018"

Email

FOUND YOU! CLICK TO CHECK IN NOW.

### Speaker Notes:

If you chose to enter volunteers individually you will be prompted to enter the email for that volunteer's online volunteer center account. Click "Find My Account."

Once the site identifies the email address with the account of the volunteer, click the "Found You! Click to Check in Now" icon to submit the volunteers check in request. You will receive a confirmation that the volunteer was checked in.

**Protip:** Set up a computer and have volunteers check themselves in on this screen.

## Agency Manager: Checked in Now: Checking Out Volunteers

RETURN TO OUR WEBSITE MY AGENCY (4%) IU HELP

DASHBOARD NEEDS EVENTS AGENCIES COLLAPSE MENU

Agency Manager > Checked In Now

### United Way of Will County

Click here to open Agency Manager's Toolbox

CLICK HERE FOR OUR GUIDE TO POSTING AND MANAGING VOLUNTEER OPPORTUNITIES!

VIEW EDIT NEEDS EVENTS STATS SCHEDULE TIME TRACKING VERIFIED VOLUNTEERS

CHECK-IN **CHECKED IN NOW**

#### Checked-In Users

Table Filter

USER	NEED	START	END	CHECK-IN	CHECK-OUT
Intern UWWC	Intern - Fall 2018	Jun 22, 2018 12:00 am	Jun 22, 2038 11:59 pm	Jul 17, 2018 11:09 am	<input type="text"/>

f PRIVACY POLICY galaxy

### Speaker Notes:

The “Checked-in Now” tab under the agency managers toolbox allows you to enter a check out time for volunteers.

This allows you to enter the check out time for volunteers at the end of the day or shift for a current need. Go down to the list of checked in volunteers and you will see a “Check-out Dropbox” that allows you to input an out time for that volunteer. This will complete and log their volunteer service hours for that need.

## Agency Manager: View:

The screenshot displays the Agency Manager interface for United Way of Will County. The left sidebar contains navigation links: DASHBOARD, NEEDS, EVENTS, AGENCIES, and a COLLAPSE MENU. The top navigation bar includes links for RETURN TO OUR WEBSITE, MY AGENCY, a calendar icon, a bar chart icon, a notification bell with (45), a user profile icon with IU, and a HELP link. The main content area is titled 'Agency Manager > Checked In Now' and 'United Way of Will County'. A prominent red banner with a wrench icon and the text 'Click here to open Agency Manager's Toolbox' is present. A red box highlights a link that says 'CLICK HERE FOR OUR GUIDE TO POSTING AND MANAGING VOLUNTEER OPPORTUNITIES!'. Below the banner, there are tabs for VIEW, EDIT, NEEDS, EVENTS, STATS, SCHEDULE, TIME TRACKING, and VERIFIED VOLUNTEERS. Under the 'CHECKED IN NOW' tab, there is a 'Checked-In Users' section with a 'Table Filter' dropdown. The table lists users with columns for USER, NEED, START, END, CHECK-IN, and CHECK-OUT. The first row shows 'Intern UWWC' for 'Intern - Fall 2018' with start and end dates in 2018 and a check-in time of 11:09 am. The bottom of the page features a footer with a Facebook icon, a 'PRIVACY POLICY' link, and the 'galaxy' logo.

USER	NEED	START	END	CHECK-IN	CHECK-OUT
Intern UWWC	Intern - Fall 2018	Jun 22, 2018 12:00 am	Jun 22, 2038 11:59 pm	Jul 17, 2018 11:09 am	<input type="text"/>

## Speaker Notes:

If you need more information, use the guides located here.

## Agency Manager: View:

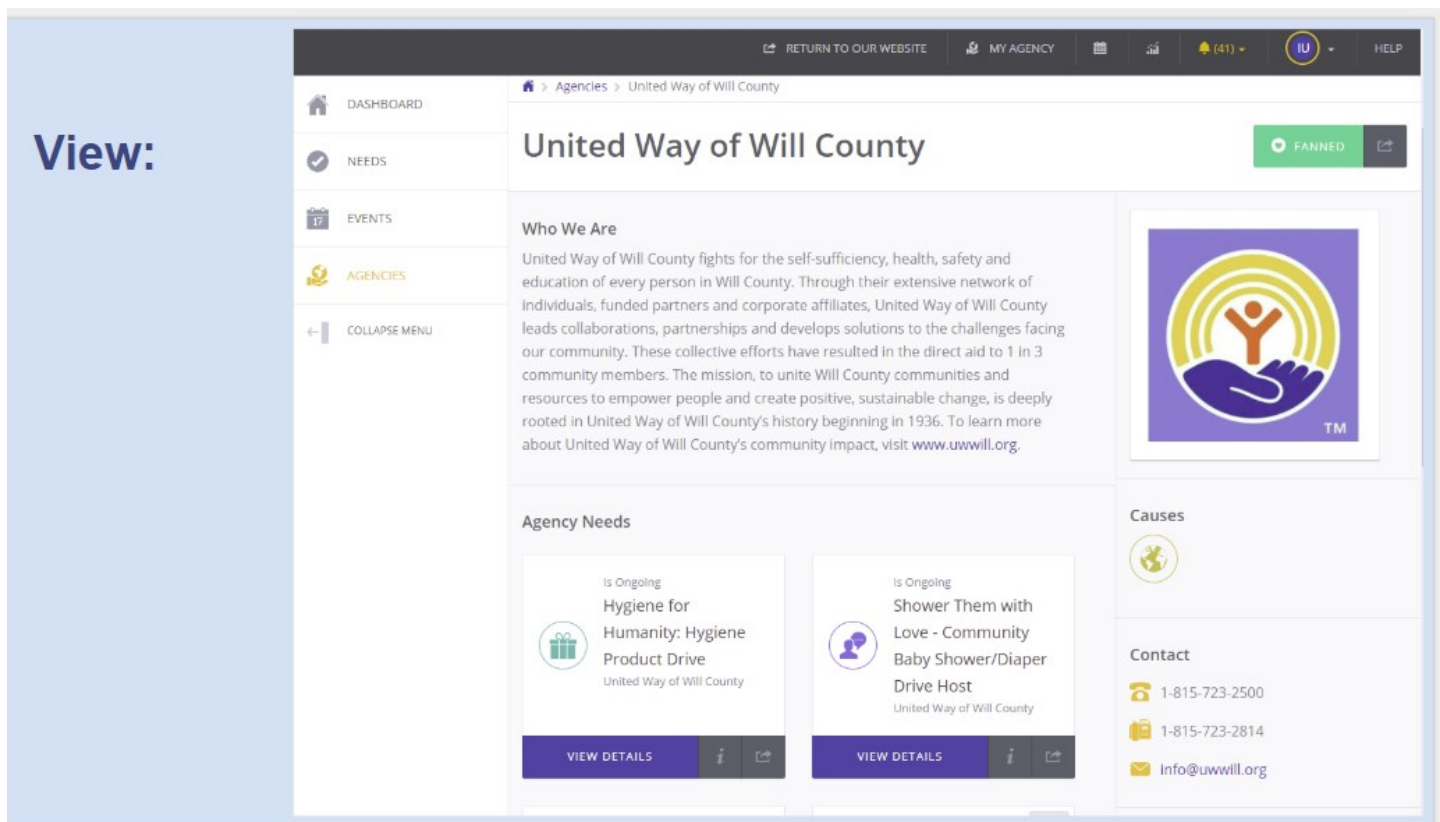
The screenshot shows the 'View' page in the Agency Manager interface. The left sidebar contains navigation links: DASHBOARD, NEEDS, EVENTS, AGENCIES, and a COLLAPSE MENU button. The main content area is titled 'United Way of Will County' and features a red banner with a wrench icon and the text 'Click here to open Agency Manager's Toolbox'. Below the banner is a horizontal menu with options: VIEW (highlighted with a red box), EDIT, NEEDS, EVENTS, STATS, SCHEDULE, TIME TRACKING, and VERIFIED VOLUNTEERS. Under the 'VIEW' tab, there are two sub-tabs: 'CHECK-IN' and 'CHECKED IN NOW' (which is active). The 'Checked-In Users' section displays a table with columns: USER, NEED, START, END, CHECK-IN, and CHECK-OUT. A 'Table Filter' button is located to the right of the table. The table contains one row of data for an intern. The footer includes a Facebook icon, a 'PRIVACY POLICY' link, and the 'galaxy' logo.

USER	NEED	START	END	CHECK-IN	CHECK-OUT
Intern UWWC	Intern - Fall 2018	Jun 22, 2018 12:00 am	Jun 22, 2038 11:59 pm	Jul 17, 2018 11:09 am	<input type="text"/>

## Speaker Notes:

You can view your modified page with your new need posted back on your agency page.

In the toolbox and click “View” to be redirected to your agency page.



## Speaker Notes:

Your agency page is what volunteers view about your agency. Any modifications or new listings should be reflected here.

You can utilize this to view modifications from the volunteer viewpoint, analyzing your page from the volunteers point of view.



## Best Practices:

- Post opportunities as soon as needs and events are planned. This will give time for volunteers to find the opportunity.
- Use the community calendar of events to see when others are having events.
- Don't wait to use notes from this training - you will forget!
- Capitalize on the "clone" tool.
- Use the "Court Mandated" option under interests.
- Have more than one person authorized to manage your page as this will help if someone is out of the office.

# Thank You

Contact Sarah Oprzedek for further questions.

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