

# VOLUNTEER SOLUTIONS Handbook



**LIVE UNITED.**

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## Volunteer Solutions Introduction

Volunteer Solutions is a web-based volunteer matching program that matches volunteer opportunities with individuals, corporations and groups that are looking for meaningful volunteer opportunities.

**You will use Volunteer Solutions (VS) to:**

- Recruit individuals and groups to volunteer at your organization for date-specific and ongoing opportunities
- Track responses from prospective volunteers (referrals)
- Track volunteer hours completed by individuals matched to your opportunities

**Two additional features are offered on VS to assist organizations:**

- In-kind donations – allows volunteers to list their wish list for their programs
- Board Match – helps you find individuals to serve on your board

**Benefits to using Volunteer Solutions:**

- There is no fee to any agency or volunteer to use Volunteer Solutions
- Web-based – you have 24 hour access to access your information
- Promotes awareness about your organization, i.e. mission, description, history and website
- List's board positions online and connects individuals looking for board positions with your organization
- Provides needed donations for your organization

To access volunteer solutions go to <http://211ut.org>, under 'Give Help' select Search for Volunteer Opportunities.

If you need assistance with logging on or other information please contact the Volunteer Center at [volunteercenter@uw.org](mailto:volunteercenter@uw.org).

## Registering/Creating an account

To use VS to recruit and manage volunteers, you will need to register your organization. An Administrator will review your registration application and approve your organization. Your account will be activated and you are free to modify the information.

**The signup process will take about 15 minutes provided that you have all the information listed below:**

- Primary contacts with up-to-date email, phone number and address
- Password to later update your information
- Employer Identification number (EIN optional)
- Mission statement
- Description of services statement
- Coordinator's name, phone, and address for each listing (if you have multiple sites)
- Title of volunteer opportunity listings, descriptions and dates (where applicable)

## To register with VS to obtain an Agency account:

1. Go to [United Way of Salt Lake](#)
  - Click on **2-1-1** at the top.
  - Under 'Give Help' click **Search for Volunteer Opportunities**.
1. Find and click the link in the **Login** section labeled **New Agencies-Register Here**.
2. Review the information provided on the **Agency Sign Up** page
  - Type in your organization's name in the **Agency Name** box
  - Click **Sign Up!**
3. Click the **legal notices** link at the bottom of the page & review the information displayed on the **Terms and Conditions** page, as well as the legal information obtained by. If you agree to these terms of use,
  - Click **I Agree; continue**.
4. Fill in the form on the **Add Agency Listing** page with the requested information. Entries are required in certain fields; these will be marked with an asterisk (\*). When finished,
  - Click **Save and continue**.
5. VS will next offer you the option of uploading your organization's logo. If you do not wish to upload your logo at this time,
  - Click **I do not want to upload a logo**. (You can upload the logo at a later time.) If you wish to upload your logo,
  - Click the **Browse . . .** button on the **Upload logo** page,
  - Find and select the logo on your computer or network using the dialog box provided, and when returned to the **Upload logo** page
  - Click **Upload my logo**. (The logo file you use must be limited to 50 kilobytes, and must be in a GIF, JPEG, or PNG file format.)

VS will create a new Agency account for you and display the **Overview** tab of its **myHome** page with a note indicating that your registration will be reviewed by an Administrator before it is activated.

Note that the tools and settings for your account are grouped by VS into several tabs. In the **Tasks** section of the **Overview** tab, VS will display links to prompt you to take particular actions, such as updating an expiring opportunity listing or [renewing your Agency account](#).

## Logging in to your Account

After your account has been approved, you can log into it at any time and from any computer connected to the Web.

To log into your account:

1. Go to the Volunteer and [Agency Log In](#) page. Bookmark this page.
  - Type in your username and password.
  - If you have forgotten your password, click the **Forgot Your Password?** link to have it sent to you.
  - Click **Go!**
2. Select **Agencies**
  - Type in your username and password
  - Click **Go!**

VS will log you in and display your **Home** page, from which you can manage your account settings, opportunities, referrals, and volunteer hours.

## Updating Your Listing

You can update the information about your organization contained in your listing (the general description of your organization provided to volunteers). For example, if your organization moves its offices to a new location, you may wish to update your address in VS.

In addition, you will be prompted by VS eventually to [renew your account](#), typically 12 months after creating it, or your account will expire.

To update your listing:

1. Log in to your account (see [Logging in to Your Account](#) for instructions, if needed).
2. When VS displays your organization's **myHome** page, find the **Agency Listing** tab near the top and click it.
3. Find the section containing the information in your listing you would like to update, and click the link provided for modifying this information. For example, to change your organization's mailing address, click the **Edit Mailing Address** link in the **Mailing Address** section at the bottom of the page. If you would like to review the listing as it will appear on VS, click the **See the listing as volunteers see it** link at the top of the page.
4. Follow the provided instructions for modifying the section of the listing you wish to change.

## Renewing Your Listing

You will be prompted by VS to renew your listing after an interval specified by an Administrator, typically every 12 months. If you or another contact do not renew the listing, it will expire. This feature encourages organizations to check their accounts to make sure the information is current, and keeps volunteers, board, candidates, and donors from contacting organizations whose accounts are dormant.

VS will prompt you to renew your listing by displaying a link in the **Tasks** section of the **Overview** tab of your account displayed when you [log in](#). You or the contact that has been [assigned to the organization listing](#) will also receive a renewal notice from VS by email.

To renew your Account:

1. Log in to your account (see [Logging in to Your Account](#) for instructions, if needed).
2. When VS displays your organization's **myHome** page, find the **Agency Listing** tab near the top and click it.
3. On the **Agency Listing** page, in the **General Administration** section, find and click the **update** link.
4. Review the listing information displayed. If any information is inaccurate or out of date, click the **Edit [section]** link for the section with the information you would like to modify (where **[section]** represents the section containing the information to be changed). For example, if you would like to make a change on the list of contacts, click the **Edit/Add Contacts** link (see [Working with Contacts](#) for more information on working with Agency Contacts).
5. If none of the information in a section needs to be changed (or if you have made edits and have returned to the listing information page), click the checkbox provided in the upper left-hand corner of the listing.
6. Repeat Steps 4 and 5 for each section of the listing until all of the check boxes have been clicked.
7. Click the **Update** button.

## Uploading Your Logo

If you did not upload a logo when you [created your account](#), you can do so at any time.

To upload your logo:

1. Log in to your account (see [Logging in to Your Account](#) for instructions, if needed).
2. When your Agency's **myHome** page is displayed, click the **Overview** tab (if it is not already selected).
3. Click the **Upload your organization's logo** link in the **Tasks** section.
4. Click the **Browse . . .** button on the **Upload logo** page to find and select the logo file on your computer or network using the dialog box provided. Note that the logo file you decide to use must be limited to 50 kilobytes, and must be in a GIF, JPEG, or PNG file format. This means a logo size of about 200 x 200 pixels (about 2.5 inches by 2.5 inches).
5. When returned to the **Upload logo** page, click **Upload my logo**.

VS will take you to the **Agency Listing** page of your account and display the uploaded logo in the **Your Logo** section.

## Changing Your Password

You can change the password you use to log into your VS account.

To change your password:

1. Log in to your account (see [Logging in to Your Account](#) for instructions, if needed).
2. When VS displays your organization's **myHome** page, click the **Overview** tab (if it is not already selected).
3. Find the **Change Password** link in the **General Administration** section at the bottom of the page and click it.
4. In the **Change Your Password** page, supply your old password (for security purposes), followed by the new password you wish to use.
5. If you wish to use a password question for added security (or change the one you are currently using), in the **Password Question** section select a new question and type in the answer.
6. Click **Okay**.

## Working with Contacts

The **Contact Manager** tool in your account stores the names and contact information for staff members of your organization. You use the **Contact Manager** to keep track of coworkers with access to your account, and/or to [assign them](#) as the primary contacts for opportunities you create.

To access the **Contact Manager**:

1. Log in to your account (see [Logging in to Your Account](#) for instructions, if needed).
2. When VS displays your organization's **myHome** page, find the **Contacts** tab near the top and click it.

VS will display the **Contact Manager** for your account, which shows all available contacts and the listings they have been assigned to as the primary contact, if any (as indicated with "X's"). This includes both your Agency listing, as well as individual opportunity listings.

## Working with Locations

In addition to the main address of your organization, you can record additional addresses in your account for other offices or service sites of your organization where volunteers might be placed. The **Location Manager** stores your addresses and allows you to [assign them](#) as locations to listings (both the main listing and individual opportunity listings).

To access the Location Manager:

1. Log in to your account (see [Logging in to Your Account](#) for instructions, if needed).
2. When VS displays your organization's **myHome** page, find the **Locations** tab near the top and click it.

VS will display the **Location Manager** for your account, which shows all available Agency locations and the number of listings they have been assigned to.

## Linking Your Listings to Other Web Pages

VS is able to create links you can use in Web pages and email messages to give volunteers and others one-click access to your organization and opportunity listings. VS generates lines of **HTML** code that you copy and paste into email messages and Web-page source files that will display clickable images linking to (respectively) your listing and current opportunities.



If you are unsure on how to use this feature of VS, you may wish to consult your organization's technical-support staff.

To obtain the HTML code needed to link to your organization and opportunity listings:

1. Log in to your account (see [Logging in to Your Account](#) for instructions, if needed).
2. On your organization's **myHome** page, click the **Overview** tab (if it is not already selected).
3. Find the **Link to your listing** link in the **General Administration** section and click it.

VS will display two sets of HTML code; the top one will link to your listing, and the bottom one will link to your opportunities. You can highlight and copy the code for the listing(s) you would like to embed a link to and paste it into email messages and the source files of Web pages.



## Viewing Listing Statistics

VS can track and display for you the number of “hits” (or online visits) your Agency and opportunity listings receive. This lets you determine how visible your organization and opportunities are within VS and which opportunities seem to be most popular with prospective volunteers.

To view the tracking statistics for your organization and opportunity listings:

1. Log in to your account (see [Logging in to Your Account](#) for instructions, if needed).
2. On your organization’s **myHome** page, click the **Overview** tab (if it is not already selected).
3. Find the **View statistics on your listing** link in the **General Administration** section and click it.



## Introduction to Creating and Managing Opportunities

**Opportunities** are descriptions of date-specific and ongoing tasks at your organization for which you would like to recruit volunteers. You use your account to create and submit opportunities, which are reviewed by a Volunteer Center Administrator and then posted in VS for volunteers to see.

Opportunities you and your colleagues [create](#) are stored in a table on the **Opportunities** page of your agency account. The opportunities can be filtered using the links at the top of the table to display only **Active Opportunities**, **Inactive Opportunities**, and **All Opportunities**. The **Inactive Opportunities** list contains opportunities that have not yet been approved by an Administrator, opportunities you have [disabled](#), and date-specific opportunities that have expired.

Volunteers will inquire about the opportunities by phone, email, or fax, which you can track as [referrals](#). If a volunteer is matched to an opportunity, you can [track the hours](#) he or she volunteers for it, and/or review and [approve volunteer hours](#) claimed for the opportunity by the volunteer.

## Creating a Volunteer Opportunity

Opportunities are created in VS as either **date-specific** or **ongoing** activities. As their names imply, date-specific opportunities are tied to one or more specific dates and expire when their dates have elapsed, whereas an ongoing opportunity is a task for which you need volunteer assistance on a continual basis that remains posted in VS until you [disable](#) or [delete it](#).

The process for creating opportunities is essentially the same for both types of opportunities, with the exception of date-specific opportunities requiring you to select one or more dates on which the opportunity will be offered. You can [change a date-specific opportunity to an ongoing one](#) and vice versa later on, if necessary.

To create an opportunity:

1. Log in to your account (see [Logging in to Your Account](#) for instructions, if needed).
2. On your organization's **myHome** page, find the **Opportunities** tab and click it.
3. Depending on the type of opportunity (date-specific or ongoing) you wish to create, click either the **Add a Date-specific Opportunity** link or the **Add an Ongoing Opportunity** link.
4. Supply the information requested in the fields provided in the **Add opportunity** pages, clicking **Save and Continue** to move between pages. Note that fields marked with an asterisk ( **\*** ) are required. Note also that on the first page (**General Information**) you will be prompted to assign a contact and location to the listing using the drop-down menus provided. If you wish to assign a contact and/or location not currently listed in the menus, select **Another Person** or **Another Location** and you will be prompted later in the opportunity-creation process to supply the new contact and/or location (see [Working with Agency Contacts](#) and [Working with Agency Locations](#) for more information about Agency contacts and locations).
5. When you reach the **Geographic location** page, specify whether the opportunity is offered only at the location you specified in Step 4, or is available at multiple locations. If the opportunity will only be offered in the location specified when you began creating its listing, click **No - only this location is available**. If the opportunity will be offered in multiple locations, click instead **Yes, more than one**

**physical location is available**, after which you will be prompted to provide additional location information and click **Save and Continue**.

When finished, VS will display the **Registration Complete** page for the new opportunity, which notes that your opportunity will appear in VS once an Administrator has viewed and approved it.

Opportunity listings to expire after an interval specified by an Administrator. VS will prompt you to update the listing by displaying a link in the **Tasks** section of the **Overview** tab of your Agency account.

## Modifying a Volunteer Opportunity

You can make changes to volunteer opportunities after they are [created](#). The instructions in this topic will describe how to make most of the changes you are likely to make to an opportunity. Some specific changes to opportunities can be made in other ways, and are described in other topics. For example, see [Changing Opportunity Types \(Date-Specific and Ongoing\)](#) for changing a date-specific opportunity to an ongoing one (and vice versa); [Assigning Contacts to Listings](#) for changing contacts for an opportunity using the **Contact Manager**; and [Assigning Locations to Listings](#) for changing locations for an opportunity using the **Location Manager**.

To modify an opportunity:

1. Log in to your account (see [Logging in to Your Account](#) for instructions, if needed).
2. On your organization's **myHome** page, find the **Opportunities** tab and click it.
3. On the **Opportunities** page, find the opportunity you would like to modify in the table of opportunities and click the **Details** link on the right side of its entry. If the opportunity has expired, is [disabled](#), or has not yet been approved by an Administrator, it is considered inactive; you may have to click the **Inactive Opportunities** link at the top of the table of opportunities to find it.
4. When the **Details** page for the opportunity is displayed, find the section containing the opportunity information you would like to change and click its **Edit** link. For example, to edit the general information of the opportunity (such as the description or requirements), click the **Edit General Information** link in the **General Information** section.
5. Make the desired changes on the pages provided and click **Save and Continue** (or **Continue**) when finished.

## Changing Opportunity Types (Date-specific and Ongoing)

You can change a date-specific opportunity to an ongoing one and an ongoing opportunity to a date-specific one. If you change an ongoing opportunity to a date-specific one, you will need to assign one or more dates to the opportunity (described in Step 6 below).

To change the opportunity type:

1. Log in to your account (see [Logging in to Your Account](#) for instructions, if needed).
2. On your organization's **myHome** page, find the **Opportunities** tab and click it.
3. On the **Opportunities** page, find the opportunity you would like to change the type of in the table of opportunities and click the **Details** link on the right side of its entry. If the opportunity has expired, is [disabled](#), or has not yet been approved by an Administrator, it is considered inactive; you may have to click the **Inactive Opportunities** link at the top of the table of opportunities to find it.

4. If the opportunity is currently a date-specific opportunity, on its **Details** page you will see a link labeled **Turn into an ongoing opportunity**. If it is an ongoing opportunity, you will see instead a link labeled **Turn into a date-specific opportunity**. Click this link.
5. When the **Type changed** page is displayed, click the **Back to the opportunity administration** link. You will be taken back to the **Details** page for the opportunity.
6. If you have changed a date-specific opportunity to an ongoing one, you are finished (unless you need to change other information or settings for the opportunity; see [Modifying a Volunteer Opportunity](#) for more information). If you have changed an ongoing opportunity to a date-specific one, you will need to assign one or more dates to the opportunity. On the **Details** page for the opportunity, find the **Upcoming**

**Dates** section, click the **Edit dates** link, and then click the **Add a date** link on the **Event dates** page. Follow the instructions on the **Choose dates** page to select one or more dates for your opportunity.

## Copying a Volunteer Opportunity

VS allows you to make copies of your opportunities. This can help you save time and effort when creating new opportunities by importing information from existing ones.

To copy an opportunity:

1. Log in to your account (see [Logging in to Your Account](#) for instructions, if needed).
2. On your organization's **myHome** page, find the **Opportunities** tab and click it.
3. On the **Opportunities** page, find the opportunity you would like to copy in the table of opportunities and click the **Details** link on the right side of its entry. If the opportunity has expired, is **disabled**, or has not yet been approved by an Administrator, it is considered inactive; you may have to click the **Inactive Opportunities** link at the top of the table of opportunities to find it.
4. When the **Details** page for the opportunity is displayed, click the **Create a copy of this opportunity** link.
5. In the **Create a copy** page, you will be prompted to specify which, if any, opportunity information you would like to synchronize between the original opportunity and the copy or copies you are making. This enables you to make changes to the original opportunity or a copy and have the information updated in both at the same time. If you would like to create a completely new and separate copy (or are unsure if you want the original and copy or copies synchronized), select **No** for all options.
6. Click **Create copy**.
7. When the **Listing Copied** page is displayed, click **View original listing** to be returned to the **Details** page for the original opportunity, or **View copy** to be taken to the **Details** page for the copy.

## Disabling a Volunteer Opportunity

You can disable an opportunity, which removes it from viewing by volunteers but saves its information if you would like to [restore it](#) later. For example, if you have an opportunity that has a recurring need for volunteers, you can disable it once you have recruited enough volunteers for the present time and restore it later when you need to recruit the next group.

To disable an opportunity:

1. Log in to your account (see [Logging in to Your Account](#) for instructions, if needed).
2. On your organization's **myHome** page, find the **Opportunities** tab and click it.

3. On the **Opportunities** page, find the opportunity you would like to disable in the table of opportunities and click the **Details** link on the right side of its entry. If the opportunity has expired or has not yet been approved by an Administrator, it is considered inactive; you may have to click the **Inactive Opportunities** link at the top of the table of opportunities to find it.
4. When the **Details** page for the opportunity is displayed, click the **Disable this listing** link.
5. On the **Disable opportunity** page, click **Yes, disable this opportunity**.

VS disables the opportunity and moves it to the **Inactive Opportunities** section of the table of opportunities on your **Opportunities** page.

## Deleting a Volunteer Opportunity

You can remove from VS opportunities that are no longer used or wanted.

To delete an opportunity:

1. Log in to your account (see [Logging in to Your Account](#) for instructions, if needed).
2. On your organization's **myHome** page, find the **Opportunities** tab and click it.
3. On the **Opportunities** page, find the opportunity you would like to delete in the table of opportunities and click the **Details** link on the right side of its entry. If the opportunity has expired, is [disabled](#), or has not yet been approved by an Administrator, it is considered inactive; you may have to click the **Inactive Opportunities** link at the top of the table of opportunities to find it.
4. When the **Details** page for the opportunity is displayed, click the **Erase this listing** link.
5. On the **Delete opportunity** page, click **Yes, delete this opportunity**.

## Introduction to Referrals

When a volunteer, board candidate, or donor is interested in a listing you have posted in VS, he or she will get in touch with you to learn more about it. This initial contact is known as an **inquiry** to the sender and as a **referral**.

If a volunteer, candidate, or donor inquires about one of your listings using the inquiry form provided by VS, an email notification will be sent to you (or a colleague if he/she was [set as the primary contact for the listing](#)) and the referral will be recorded on the **Referrals** tab of your Agency account.

The topics in this section will focus on working with email referrals received through VS. However, you should also have (if you do not already) a process in place for tracking, following up on, and managing referrals that come to you by phone, fax, or non-VS-generated emails.

## Tracking Referrals

The **Referrals** tab in your account tracks referrals submitted by volunteers for your opportunity listings, making it easy for you to track and manage them.

To display your referrals:

1. Log in to your account (see [Logging in to Your Account](#) for instructions, if needed).
2. On your organization's **myHome** page, find the **Referrals** tab and click it.

The **Referrals** tab displays a table containing your referrals, which can be sorted within the columns provided by clicking the column headings at the top. You can also filter the referrals using the drop-down menus provided above the table. These tools will be helpful for finding and managing records when your account starts to accumulate large numbers of referrals.

From the **Referrals** tab you are able to [follow up on](#) referrals by email, track and [change the status of referrals](#), and [download referral records](#).

## Following Up on Referrals

Referrals from volunteers, board candidates, and donors should be followed up on promptly. If they have sent their inquiries via email using a form provided by VS, VS will capture and store the messages so that you can easily track and respond to them.

The easiest way to access new referrals is by clicking a link VS supplies in the **Tasks** section of the **Overview** tab of your account when you are [logged in](#). VS will display a link labeled **Follow up on [number] referral(s)**, where **[number]** represents the number of referrals awaiting review and response.

New referrals are also accessible on the **Referrals** tab of your account.

To follow up with a volunteer using the **Referrals** tab of your account:

1. Log in to your account (see [Logging in to Your Account](#) for instructions, if needed).
2. On your organization's **myHome** page, find the **Referrals** tab and click it.
3. On the **Referrals** page, scan the table of referrals for records that have **Inquired** displayed in the **Inquiry Status** column. When you find one, click the email address of the volunteer provided in the **Email address** column. This will open up your default email application and address a new message to the volunteer. If clicking the link does not open your preferred email application, or does not work, you can also open your preferred email application first and then copy and paste the address provided into it (you can click the **Details** link for the referral to get the full email address of the volunteer if it is cut off in the table of referrals).
4. Repeat as many times as necessary until you have responded to all new referrals.

Once you have responded to a referral, you may want to update its record on the **Referrals** tab to track progress on placing the volunteer (see [Tracking Referrals](#) and [Changing Referral Status](#) for instructions on how to do so).

It is important that you respond to referrals promptly. This is true even in cases where you no longer need volunteers for an opportunity or are not interested in a particular volunteer. A prompt response to a volunteer inquiry builds goodwill and encourages the volunteer to return to you when other opportunities become available and/or recommend you to other volunteers.

## Changing Referral Status

Each referral tracked by VS on the **Referrals** tab is assigned an **Inquiry Status** setting that allows you to indicate at which step you are in moving a referral from inquiry to completion. New referrals are automatically set to **Inquired** by VS when they are submitted by volunteers, board candidates, and donors. VS will also automatically mark referrals older than three months as **Expired**. Once you follow up on and start tracking a referral, you can change its status to **Active**, **Complete**, and **Not interested**.

To change the status of a referral:

1. Log in to your account (see [Logging in to Your Account](#) for instructions, if needed).
2. On your organization's **myHome** page, find the **Referrals** tab and click it.
3. Find the referral(s) you would like to change the status of. If you have a large number of referrals, or if you would like to change the status of several referrals at once, you may need to sort the table by clicking the column heading you would like to sort by or filter it using the filter drop-down menus above the table.
4. Select the opportunity(ies) you would like to change the status of by clicking its/their check box(es) in the first column of the table.
5. Select a status setting from the **Change all checked referrals to** drop-down menu and click **Go**.

Note that you can also change the status of individual referrals by clicking the **Details** link on the right side of their entries in the table of referrals and then clicking the **change** link for the **Status** setting in the referral's **Referral Details** page.

## Downloading Referral Records

You can download referral records from VS for tracking and reporting purposes. You can **export** your referral records in several formats (including Microsoft Excel, **CSV**, and **HTML**), which is helpful if you would like to be able to manipulate the referral records in a spreadsheet or database. You can also have VS generate a **PDF** file containing all referrals for printing.

To download referral records from your account:

1. Log in to your account (see [Logging in to Your Account](#) for instructions, if needed).
2. On your organization's **myHome** page, find the **Referrals** tab and click it.
3. If you wish to arrange referrals prior to downloading and/or select specific records to be downloaded, make adjustments and selections using the sorting and filtering tools provided (the clickable column names and the filtering drop-down menus).
4. If you would like to export the referral records (which allows for their manipulation in worksheets and databases), click the **Export records to CSV** link and follow the instructions for exporting the referrals in a download format you select. If you would like VS to create a PDF file of the referrals displayed, click the **Create PDF** link in the top row of the table and follow the instructions for generating the PDF.

## Using Volunteer Event Management

VS offers a tool called **Volunteer Event Management (VEM)**, which may also be referred to in VS as **VEM2** that allows Volunteer Center Administrators to plan and manage events involving large numbers of organizations and volunteers (such as “service weeks” or “volunteer days”). As an organization, you may be asked or required by an Administrator to create opportunities specifically for the event. These event-specific opportunities are known as **projects**, and are managed somewhat differently than other opportunities you create.

For more detailed information on how to work with **VEM** and community events, see the **Working with VEM2 as an Agency** section of the **VEM2** documentation.



## Introduction to Managing Volunteer Hours

If an Administrator has enabled time-tracking in VS, you can track the hours volunteers work on the opportunities they are matched to. Volunteer hours can be logged by volunteers themselves by submitting a claim for hours worked on a particular opportunity, which you will have a chance to review and [approve](#) before they are posted in VS. You can also [log hours for a volunteer](#) using the referral record that matched him or her to the opportunity, and/or by using the **Hours** tab of your account.

The **Hours** tab offers sorting and filtering tools (the clickable column headings in the table of entries and the **Filters** section above it) to help you find specific hours-log entries and/or manage large numbers of entries. You can use the **Hours** tab to [edit](#) and/or [delete](#) hours-log entries of volunteers, as well as [download records of volunteer hours](#).

## Approving Volunteer Hours

One way in which volunteer hours are recorded in VS is by volunteers submitting a claim for hours worked on opportunities. VS will notify you when a volunteer makes a claim for hours and give you a chance to review and approve them before they are posted.

To approve hours submitted by a volunteer:

1. Log in to your account (see [Logging in to Your Account](#) for instructions, if needed).
2. On your organization's **myHome** page, click the **Overview** tab (if not already selected).
3. Click the link in the **Tasks** section labeled **Approve hours for [number] entry(ies)**, where **[number]** represents the number of volunteers making claims for hours.
4. Review the hours claim(s) listed in the table on the **Volunteer Hours** page. If you wish to change the number of hours a volunteer is claiming before approving his or her claim, click the **Details** link on the right side of the entry and follow the instructions in [Editing an Hours-Log Entry](#).
5. To approve a single hours claim, click the **Approve** link found in the claim's **Status** column, and then click **Approve 1 log entry** in the **Approve Log Entry** page that is displayed. To approve multiple hours claims, select the claims you would like to approve by clicking their checkboxes in the first column of the table, change the **Select Action** drop-down menu to **Approve**, and then click **Do**.

## Logging Hours for a Volunteer

A second way in which volunteer hours are recorded in VS is for you to log the hours on behalf of a volunteer. If the volunteer has not already claimed hours themselves, you will need to create an initial entry using the referral record that matched them to the opportunity they volunteered on. Subsequent hours can be logged for the volunteer using the **Hours** tab in your account (see [Logging Additional Volunteer Hours](#) for details).

To create a new hours log entry for a volunteer:

1. Log in to your account (see [Logging in to Your Account](#) for instructions, if needed).
2. On your organization's **myHome** page, find the **Referrals** tab and click it.

3. Find the referral record for the volunteer you wish to log hours for in the table of referrals. The status of the referral must be set to either **Active** or **Complete** before you can log hours (see [Changing Referral Status](#) for more information).
4. Click the **Details** link on the right side of the referral entry.
5. In the **Timecard** section of the referral's **Details** page, click the **Log additional hours** link.
6. Type in the requested information and click **Okay**.

You can now use the **Hours** tab of your account for [recording additional volunteer hours](#).

## Editing an Hours-Log Entry

You can make changes to a volunteer's hours-log entry using the **Hours** tab of you account; specifically, you can edit the entry's dates and/or number of hours completed.

To modify an hours-log entry for a volunteer:

1. Log in to your account (see [Logging in to Your Account](#) for instructions, if needed).
2. On your organization's **myHome** page, find the **Hours** tab and click it.
3. Find the hours-log entry for the volunteer you would like to edit and click the **Details** link on the right side of its entry.
4. On the **Log entry details** page, click the **Edit this log** entry link.
5. Make the desired changes to the log and click **Okay**.

## Deleting Volunteer Hours

You can delete an hours-log entry for a volunteer.

To delete an hours-log entry:

1. Log in to your account (see [Logging in to Your Account](#) for instructions, if needed).
2. On your organization's **myHome** page, find the **Hours** tab and click it.
3. Find the hours-log entry for the volunteer you would like to delete and click the **Details** link on the right side of its entry.
4. On the **Log entry details** page, click the **Erase this log entry** link.
5. On the **Erase hours** page, click **Yes, erase these hours**.

## Downloading Records of Volunteer Hours

You can download hours-log records from VS for tracking and reporting purposes. You can **export** all of your organization's hours-log entries in several formats (including Microsoft Excel, **CSV**, and **HTML**), which is helpful if you would like to be able to manipulate the records in a spreadsheet or database. You can also have VS generate a **PDF** file containing all hours-log records displayed in the table of entries on the **Hours** tab for printing.

To download hours-log records from your account:

1. Log in to your account (see [Logging in to Your Account](#) for instructions, if needed).
2. On your organization's **myHome** page, find the **Hours** tab and click it.
3. If you wish to arrange the hours-log entries prior to downloading and/or select specific records to be downloaded, make adjustments and selections using the sorting and filtering tools provided (the clickable column names and the filtering drop-down menu).
4. If you would like to export the records (which allows for their manipulation in worksheets and databases), click the **Export records to CSV** link and follow the instructions for exporting the records in a download format you select. If you would like VS to create a PDF file of the entries displayed for printing, click the **Create PDF** link in the top row of the table and follow the instructions for generating the PDF.

## Introduction to Requesting Resources –

### Board Connections & In-kind

In addition to recruiting volunteers, you may be able to use two VS add-in features to help you seek and obtain resources for your organization from your community. Specifically, you can recruit individuals to serve on your board using **Board Connections**, and you can seek donations of goods and services using [Product Connections](#) (which we refer to as In-kind.)

### Posting Board Information

Before you can create board position listings, you must first provide VS with information about your organization's board.

To post your board information:

1. Log in to your account (see [Logging in to Your Account](#) for instructions, if needed).
2. When your account is displayed, find and click the **Board Connections** tab (or whatever title the Administrator has selected).
3. On the **Board Connections Positions** page, in the **Agency Board Connections Information** section, click the **Add Board Connections information** link.
4. Provide the information requested in the form on the **Board Connections Info** page using the fields and settings provided and click **Okay**. Note that fields marked with an asterisk (\*) are required. Note also that you will be prompted to assign a primary contact to manage Board Connections information and communications using the drop-down menu provided. If you wish to assign a contact not currently listed in the menu, select **Another Person** and you will be prompted later to supply the new contact (see [Working with Contacts](#) for more information about Agency contacts).

VS will store the information provided and return you to the **Board Connections** tab of your account, which will now provide links you can use to [edit](#) or [delete](#) your board information. You can also now [create](#) and manage listings for your open board positions.

### Creating Board Position Listings

To recruit board members using Board Connections, you create listings for board positions that candidates can review and respond to. These listings must be approved by an Administrator before they will appear in VS.

To create a board position listing:

1. Log in to your account (see [Logging in to Your Account](#) for instructions, if needed).
2. When your account is displayed, find and click the **Board Connections** tab (or whatever title the Administrator has selected).
3. On the **Board Connections Positions** page, in the **Board Connections Positions** section, click the **Add a Board Connections position** link.
4. On the **Create Board Connections Position** page, provide the information requested in the form using the fields and settings provided and click **Save and Continue**. Note that fields marked with an asterisk (\*) are required.

(\*) are required. Note also that you will be prompted to assign a contact and location for the listing using the drop-down menus provided. If you wish to assign a contact and/or location not currently listed in the menus, select **Another Person** or **Another Location** and you will be prompted later in the listing-creation process to supply the new contact and/or location (see [Working with Contacts](#) and [Working with Locations](#) for more information about Agency contacts and locations).

5. VS may offer suggestions for improving your positing listing. If it does, and you wish to make any of the suggested changes, click **Review listing to make suggested changes**. If you do not wish to make changes, click **Continue with no additional changes**.

VS saves and displays the **Registration Complete** page for the position listing and notes that an Administrator will review it. You can use the links on the **Registration Complete** page to view the listing you just created as board candidates will see it, manage ([edit](#) or [delete](#) the new listing, and create additional listings.

## Responding to Donation Inquiries

Once you have created a listing for a needed item and an Administrator has approved it, it will be posted in VS for public viewing. Donors will review the listing, and if interested will submit via email **inquiries** (referred to in your account as **referrals**) that express their willingness to donate the item. You or another contact should follow up on needed-item referrals in a timely fashion to facilitate the donation or let donors know that the need has been filled.

VS tracks inquiries/referrals for a needed-item listing on the **Details** page of the listing, found in the **Your Needed Items** page of the **Product Connections** tab of your account.

To view and respond to needed-item inquiries:

1. Log in to your account (see [Logging in to Your Account](#) instructions, if needed).
2. When your account is displayed, find and click the **Product Connections** tab (or whatever title the Administrator has selected).
3. On the **Product Connections** page, find and click the **Needed Items** link (if the **Your Needed Items** page is not already displayed).
4. On the **Your Needed Items** page, review the needed-item listings in the table. A needed-item listing that has received one or more inquiries will display the number received in its “# **Inquiries**” column.
5. Click the **Details** link at the right side of a listing that has received one or more referrals.
6. When the **Details** page for the listing is displayed, scroll down to the **Referrals for this item** section and review the referrals listed. To review a referral in greater detail, click the **Details** link at the right side of its entry.
7. To respond to an inquiry, click the email address of the donor. This will open up your default email application and address a new message to the donor. If clicking the link does not open your preferred email application, or does not work, you can also open your preferred email application first and then copy and paste the address provided into it.
8. Repeat Steps 5 through 7 as many times as necessary until you have responded to all new needed-item referrals.

Note that you can also find and display needed-item referrals on the **Referrals** tab of your account. VS will also provide a shortcut for accessing Product Connections and other referrals needing follow up through a link in the **Tasks** section of the **Overview** tab of your account when you log in titled **Follow up on [number] referral(s)** (where [number] represents the number of referrals requiring review).

Note also that when you display the **Details** page for a needed-item referral (as described in Step 6 above) you can change the referral's status by clicking the **change** link to the right of its **Status** setting. This allows you to track a donation from initial inquiry through to completion.

## Tracking Board Position Inquiries

Inquiries from candidates for your board-position listings are treated as **referrals** by VS, and are stored and tracked on the **Referrals** page of your account (along with referrals for volunteer-opportunity and Product-Connections listings), making it easy to [follow up on](#) and manage them.

To display the **Referrals** page to manage board-position referrals:

1. Log in to your account (see [Logging in to Your Account](#) for instructions, if needed).
2. When your account is displayed, find and click the **Referrals** tab.
3. On the **Referrals** page, scan the table of referrals for inquiries from candidates for board-position listings.

Once you locate a referral for a board position, you can [respond to it](#) and update its status (see [Changing Referral Status](#) for instructions). You can also [log hours](#) on the referral, although hours-logging is intended primarily for tracking volunteer hours on opportunity listings.

Note that VS will also provide a shortcut for accessing Board Connections and other referrals needing follow up through a link in the **Tasks** section of the **Overview** tab of your account when you log in titled **Follow up on [number] referral(s)** (where [number] represents the number of referrals requiring review).

## Viewing Board Position Statistics

VS can track and display the number of “hits” (online visits) your board-position listings receive. This lets you determine how visible the listings are to potential candidates and gauge their interest.

To view the tracking statistics for your board-position listings:

1. Log in to your account (see [Logging in to Your Account](#) for instructions, if needed).
2. When your account is displayed, find and click the **Overview** tab (if it is not already displayed).
3. Find the **View statistics on your listings** link in the **General Administration** section and click it.
4. On the **Statistics** page, observe the number of hits for each board-position listing in the **Board Position Stats** section.

## Introduction to Product Connections (In-kind Donations)

**Product Connections** is a VS feature that helps you seek and obtain donated goods and services from volunteers and members of the public (called **donors**). You can [browse donated items](#) listed by donors themselves and [claim them](#) using the **Claim Donation**. You can also [create and manage needed-item listings](#) using the **Posted Needs** form to solicit the donation of specific items you need.

If Product Connections is available for use, you can access it by clicking a tab in your account after [logging in](#). Depending on Administrator preferences, this tab may be labeled **Product Connections** (the default) or something similar (such as **Donations** or **GiftMatch**, which was what Product Connections was called in earlier releases of VS).

## Browsing Donated Items

You can obtain donated goods and services for your organization two ways: by using needed-item listings [make link to managing needed-item listings] that solicit specific donations you are looking for, and by browsing and claiming [make link to claiming donated items] items posted by donors. You may wish to browse this list of available donations before creating a needed-item listing to see if what you are looking for is already available.

To browse the list of donations posted by donors:

1. Log in to your account (see [Logging in to Your Account](#) instructions, if needed).
2. When your account is displayed, find and click the **Product Connections** tab (or whatever title the Administrator has selected).
3. On the **Product Connections** page, find and click the **Available Items** link.
4. On the **Browse Available Items** page, use the browsing tools provided to view review available donations displayed in summary format. For example, you can filter the list of donations to find items from donors close to you by using the **Select a region** drop-down menu. You can also browse the donated-item listings by using the alphabet organizer, search for specific items using the **Find an item** search tool, or view all items or items by category using the **Browse All** and **By Category** links provided.
5. When you see a donated-item listing you would like to view in greater detail, click its title or the **more** link at the end of its listing.

Once you find a donated item you would like to have, you can [claim it](#).

## Claiming Donated Items

Once you have [browsed for](#) and found a donated item you would like to acquire and displayed its full listing, you can claim the item using the **Claim Donation** form.

To claim a donated item:

1. Following the instructions in [Browsing Donated Items](#), find the listing for the item you would like to claim and display its full text.
2. Find and click the link labeled **Claim this donation** at the bottom of the listing.



3. On the **Claim Donation** page, review the information displayed in the **Claim Donation** form and make any needed or desired changes.
4. Click the **Claim this donation** button.

VS emails the information in the **Claim Donation** form to the owner of the donated item as an **inquiry**, after which it is up to you and the donor to coordinate the transfer of the item. To help keep tabs on the status of the donation, you can [track your inquiry](#) using the **Product Connections** tab of your account.

## Tracking Donated Items

You can track inquiries you have made on donated items to follow up with the donors to coordinate the transfer of the items.

To track inquiries you have made on donated items:

1. Log in to your account (see [Logging in to Your Account](#) instructions, if needed).
2. When your account is displayed, find and click the **Product Connections** tab (or whatever title the Administrator has selected).
3. On the **Product Connections** page, find and click the **Your Inquiries** link.
4. Review the table of inquiries you have submitted for donated items. To view an inquiry record in full, click the **Details** link on the right side of its entry.

The inquiry record keeps track of the record of correspondence(s) between you and the donor of the item to help facilitate the tracking and transfer of the item.

## Managing Donation Email Alerts

You can configure Product Connections to notify you and/or other contacts by email when donors post new donated-item listings. This allows you to stay up to date on donations that are available.

Note that you do not need to configure notification options for needed-item listings. Once you [create a needed-item listing](#) and an Administrator approves it, VS will collect any email inquiries sent by donors automatically. See [Responding to Donation Inquiries](#) for instructions on how to access, respond to, and manage these needed-item inquiries.

See [Subscribing to Donation Email Alerts](#) and [Adding a Donation Email Subscriber](#) for instructions on adding (respectively) yourself and others to receive donation email alerts, and [Deleting a Donation Email Subscriber](#) for instructions on how to remove yourself or others from the donation-email-alert list.

## Managing Needed-Item Listings

In addition to [browsing](#) and [claiming](#) items offered by donors, you can proactively solicit donations of specific goods and services your organization needs. This is done by [creating a needed-item listing](#) using the **Posted Needs** form for the item(s) you are looking for. After an Administrator reviews the listing(s), donors can review and offer to provide. You can then [respond to and track](#) these donation inquiries to coordinate with the donors to arrange for the transfer of the item(s).

## Responding to Donation Inquiries

Once you have created a listing for a needed item and an Administrator has approved it, it will be posted in VS for public viewing. Donors will review the listing, and if interested will submit via email **inquiries** (referred to in your Agency account as **referrals**) that express their willingness to donate the item. You or another Agency contact should follow up on needed-item referrals in a timely fashion to facilitate the donation or let donors know that the need has been filled.

VS tracks inquiries/referrals for a needed-item listing on the **Details** page of the listing, found in the **Your Needed Items** page of the **Product Connections** tab of your Agency account.

To view and respond to needed-item inquiries:

1. Log in to your account (see [Logging in to Your Account](#) instructions, if needed).
2. When your account is displayed, find and click the **Product Connections** tab (or whatever title the Administrator has selected).
3. On the **Product Connections** page, find and click the **Needed Items** link (if the **Your Needed Items** page is not already displayed).
4. On the **Your Needed Items** page, review the needed-item listings in the table. A needed-item listing that has received one or more inquiries will display the number received in its “**# Inquiries**” column.
5. Click the **Details** link at the right side of a listing that has received one or more referrals.
6. When the **Details** page for the listing is displayed, scroll down to the **Referrals for this item** section and review the referrals listed. To review a referral in greater detail, click the **Details** link at the right side of its entry.
7. To respond to an inquiry, click the email address of the donor. This will open up your default email application and address a new message to the donor. If clicking the link does not open your preferred email application, or does not work, you can also open your preferred email application first and then copy and paste the address provided into it.
8. Repeat Steps 5 through 7 as many times as necessary until you have responded to all new needed-item referrals.

Note that you can also find and display needed-item referrals on the **Referrals** tab of your account. VS will also provide a shortcut for accessing Product Connections and other referrals needing follow up through a link in the **Tasks** section of the **Overview** tab of your account when you log in titled **Follow up on [number] referral(s)** (where **[number]** represents the number of referrals requiring review).

Note also that when you display the **Details** page for a needed-item referral (as described in Step 6 above) you can change the referral's status by clicking the **change** link to the right of its **Status** setting. This allows you to track a donation from initial inquiry through to completion.