

Managing Volunteers

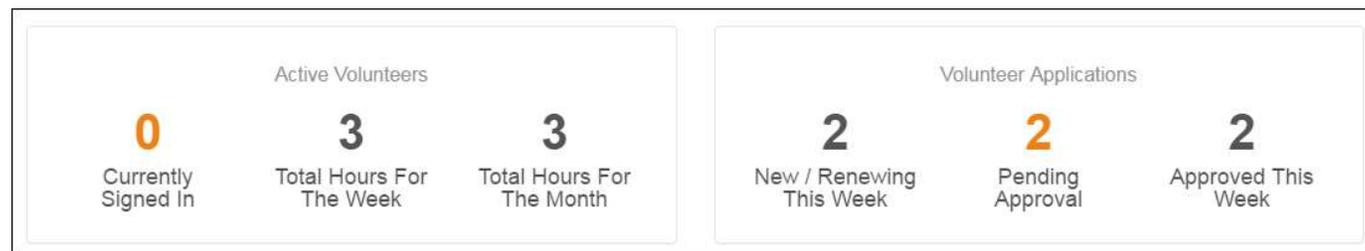
The **Volunteer** workspace is used to manage the volunteers who enter your building and the volunteer application process. This section includes the following topics:

- [Volunteer Dashboard](#)
- [Volunteer Workspace/View and Modify Volunteer Details](#)
- [View Application History/Hours Logged](#)
- [View Sign-In/Out History](#)
- [Create Volunteer Portal User Account/Create Volunteer](#)
- [Email All Volunteers/Email Volunteer—Detail Workspace](#)
- [Show/Hide Functions](#)
- [Deactivate/Activate All Volunteers](#)
- [Reset All Hours](#)
- [Import Approved Volunteers/Import Volunteer Applications](#)
- [Currently Signed In Volunteers](#)
- [Delayed Sign In/Sign Out](#)
- [Batch Printing](#)
- [Approval Queue](#)
- [Volunteer Reports](#)
- [Volunteer Events](#)

Volunteer Dashboard

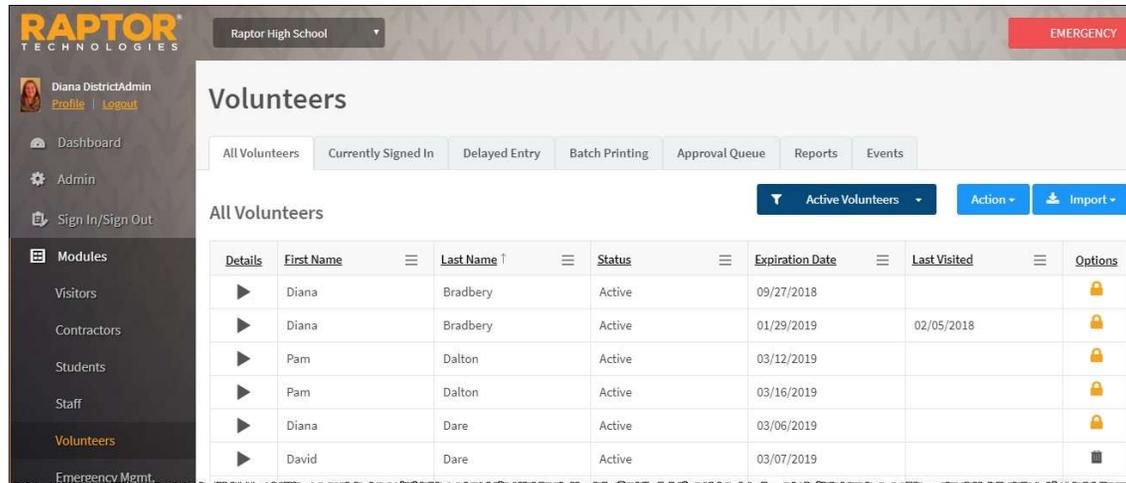
The Volunteer Dashboard displays on the home screen upon user sign in. It provides a graphical view of up-to-date information on volunteer activity. Users with the *Can Run Volunteer Reports* permission can view the Volunteer Dashboard.

- **Active Volunteers** – Displays the number of volunteers currently signed in, total hours for the week, and total hours for the month.
- **Volunteer Applications** – Displays the number of new or renewed volunteer applications that have been submitted for the current week, the number of applications pending approval, and the number of applications that have been approved for the current week.



Volunteers Workspace

You can manage volunteers using the **Volunteers** workspace. Select **Modules > Volunteers** in the navigation menu and then click the tab in the **Volunteers** workspace for the tasks you want to perform.



Details	First Name	Last Name	Status	Expiration Date	Last Visited	Options
▶	Diana	Bradbery	Active	09/27/2018		🔒
▶	Diana	Bradbery	Active	01/29/2019	02/05/2018	🔒
▶	Pam	Dalton	Active	03/12/2019		🔒
▶	Pam	Dalton	Active	03/16/2019		🔒
▶	Diana	Dare	Active	03/06/2019		🔒
▶	David	Dare	Active	03/07/2019		🗑️

Administrators with the *Can Manage Volunteers* permission can use the **All Volunteers** tab to:

- Filter to view Active, Inactive or All volunteers
- View, edit and delete volunteers
- Create an application for a volunteer
- Email all volunteers
- Deactivate and activate all volunteers
- Reset volunteer hours
- Import approved volunteers and applications (Can Import Volunteers permission)

View and Modify Volunteer Details

Filter Volunteers

You can filter which volunteers display on the **All Volunteers** workspace.

1. From the navigation menu, select **Modules > Volunteers**.
2. In the **Filter** drop-down list on the **All Volunteers** workspace, select **Active Volunteers**, **Inactive Volunteers** or **All Volunteers** to specify which volunteers display in the workspace.

View or Modify Volunteer Details

Perform the following steps to view or modify the details about a specific volunteer.

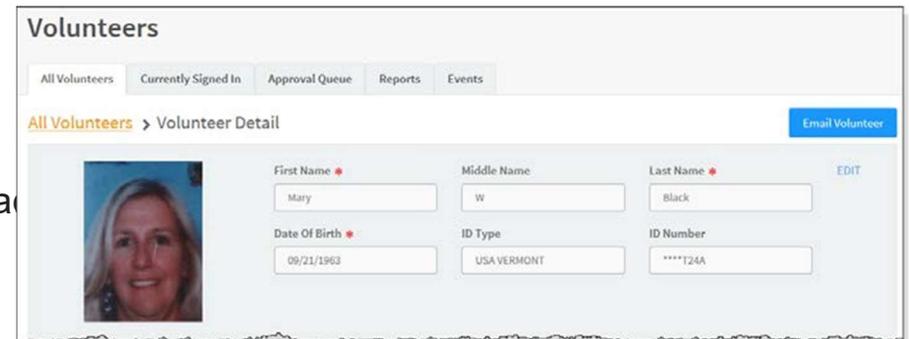
1. From the navigation menu, select **Modules > Volunteers**.
2. On the **All Volunteers** workspace, click the **h** icon next to the volunteer's name to expand the **Volunteer Detail** workspace.

Note: The **i** icon in the **Options** column indicates the record can only be modified at the client level (All Buildings).

3. If you want to modify the volunteer record, click **Edit** (asterisk * indicates a required field).
4. Click **Save** to update the record.

Delete Volunteer

On the **All Volunteers** workspace, click the **m** icon in the **Options** column and then click **OK** to confirm the deletion.



The screenshot shows the 'Volunteers' workspace with a tab for 'All Volunteers' selected. Below the tabs, there is a breadcrumb 'All Volunteers > Volunteer Detail' and an 'Email Volunteer' button. The main content area displays a volunteer's profile with a photo of a woman. The form fields are as follows:

Field	Value	Field	Value	Field	Value
First Name *	Mary	Middle Name	W	Last Name *	Black
Date Of Birth *	09/21/1963	ID Type	USA VERMONT	ID Number	****T24A

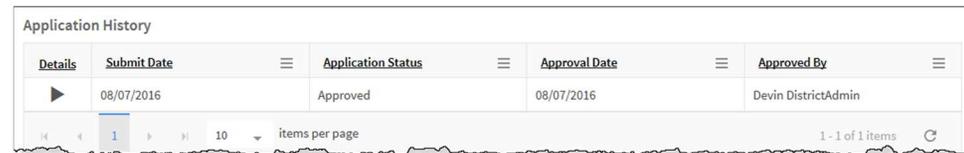
An 'EDIT' link is visible next to the form fields.

View Application History/Hours Logged

Application History

At the client level (All Buildings), the **Application History** grid on the **Volunteer Detail** workspace displays a log of all applications submitted by the volunteer. By default, the submission date, application status, approval date, and who approved the application displays.

To view the details for a specific application, click the **H** icon in the **Details** column.



Details	Submit Date	Application Status	Approval Date	Approved By
	08/07/2016	Approved	08/07/2016	Devin DistrictAdmin

10 items per page 1 - 1 of 1 items

Hours Logged

The **Hours Logged** grid on the **Volunteer Detail** workspace displays each function the volunteer has signed in for, the sign-in date and time, the sign-out date and time, and the total hours volunteered. It also includes the sign-in events and hours logged by the volunteer in the Volunteer Portal.

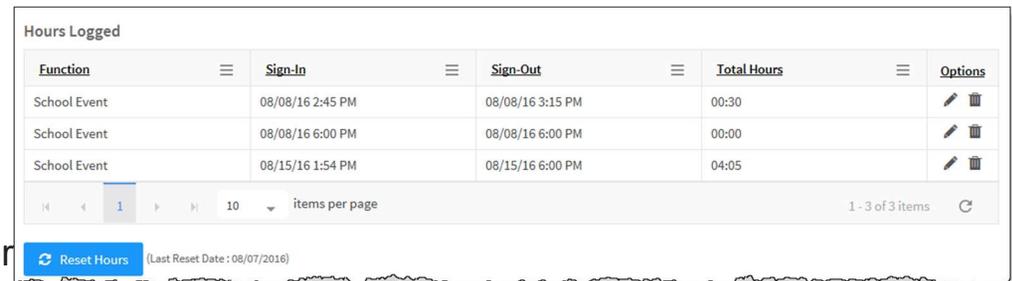
Administrators with the *Can Manage Volunteers* permission can edit the function, sign-in or sign-out date/time or delete an entry. Any of these actions will not alter the Sign In/Sign Out History.

Note: A sign-out date/time must be present to edit an entry.

Click **Reset Hours** to clear the tracked hours and reset the count to zero.

Notes:

- You can also reset volunteer hours at the building or district level.
- Resetting a volunteer's hours at any level will reset the hours across all buildings for that volunteer.



Function	Sign-In	Sign-Out	Total Hours	Options
School Event	08/08/16 2:45 PM	08/08/16 3:15 PM	00:30	
School Event	08/08/16 6:00 PM	08/08/16 6:00 PM	00:00	
School Event	08/15/16 1:54 PM	08/15/16 6:00 PM	04:05	

10 items per page 1 - 3 of 3 items

[Reset Hours](#) (Last Reset Date : 08/07/2016)

View Sign-In/Out History

The **Sign-In/Out History** grid on the **Volunteer Detail** workspace displays a log of sign in and sign out events for the selected volunteer.

By default, the Date/Time, Event Type, Building Name and Destination columns display. From the column menu, you can also choose to display the Event Method column.

<u>Date Time</u> ↓	☰	<u>Event Type</u>	☰	<u>Event Method</u>	☰	<u>Building Name</u>	☰	<u>Function</u>	☰
05/09/16 4:32 PM		Sign In		Operator Assisted		Raptor High School		School Event	
04/27/16 12:12 PM		Sign Out		Operator Assisted		Raptor High School		School Event	
04/27/16 11:06 AM		Sign In		Operator Assisted		Raptor High School		School Event	

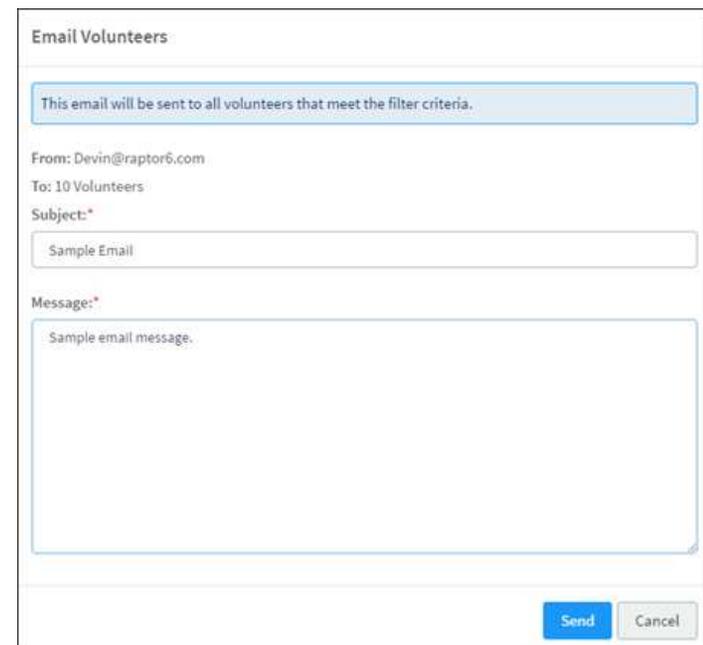
Email All Volunteers

Volunteer Coordinators can send an email to all or a portion of the volunteers from the **All Volunteers** workspace.

1. From the navigation menu, select **Modules > Volunteers**.
2. On the **All Volunteers** workspace, filter to display the volunteers you want to email. For example, select **All Buildings** and **Active Volunteers**.
3. Click **Action > Email All**.

A dialog box displays confirming the volunteers based on the selected filters.

4. Click **Proceed** on the confirmation dialog or click **Filter List Further** to return to the **All Volunteers** grid to change your filtered list.
5. Enter the email **Subject** and **Message**, and then click **Send**.



Email Volunteers

This email will be sent to all volunteers that meet the filter criteria.

From: Devin@raptor6.com
To: 10 Volunteers
Subject:*
Sample Email

Message:*
Sample email message.

Send Cancel

Show/Hide Functions

Volunteer Coordinators can filter the **All Volunteers** data grid to show those volunteers who are approved for a function. This filtered list can then be used to email those volunteers for events that require those functions.

1. From the navigation menu, select **Modules > Volunteers**.
2. On the **All Volunteers** workspace, click **Action** and select **Show/Hide Functions** to display the **Functions** column along with each function that the volunteers have been approved to participate.
3. Click the column **Filter** option to show only those volunteers who have the specific function associated with their profile.

The volunteers that meet this filtered function criteria display in the **All Volunteers** grid. You can now email these volunteers for a specific event that requires this function.

Email Volunteer—Detail Workspace

Volunteer Coordinators can send an email to a specific volunteer from the Volunteer Detail workspace.

1. From the navigation menu, select **Modules > Volunteers**.
2. On the **All Volunteers** workspace, click the **h** icon next to the volunteer's name to expand the **Volunteer Detail**.
3. Click **Send Email**.
4. Enter the email **Subject** and **Message**, and then click **Send**.

Note: The **To** field (email recipient) will not be populated if the **Email** field in the **Volunteer Profile** does not contain a value.

Email Volunteer

From: ddare@comcast.com
To: d.dare@comcast.net
Subject:

Sample Email

Message:

This is a sample email to the specified volunteer.

Send **Cancel**

Currently Signed In Volunteers

Use the **Currently Signed In** tab to view all volunteers who are currently signed in. You can also perform the following tasks from this tab.

View Sign-In Information

View the volunteers who are currently signed in, the sign in date and time, and their function.

You can hover the cursor over the photo in the data grid to view an enlarged photo.

Sign Out	Photo	First Name	Last Name	Function	Signed In	Options
Sign Out		Mary	Black	School Event	12/11/16 4:25 PM	
Sign Out		Susan	Doyle	School Event	12/11/16 4:26 PM	

Print or Reprint Badge

If a volunteer has lost their badge or changed their destination, or the printer has malfunctioned, you can reprint their badge. In the **Options** column, click the icon to print or reprint the badge.

Sign Out Volunteers

You can sign out a single volunteer or multiple volunteers:

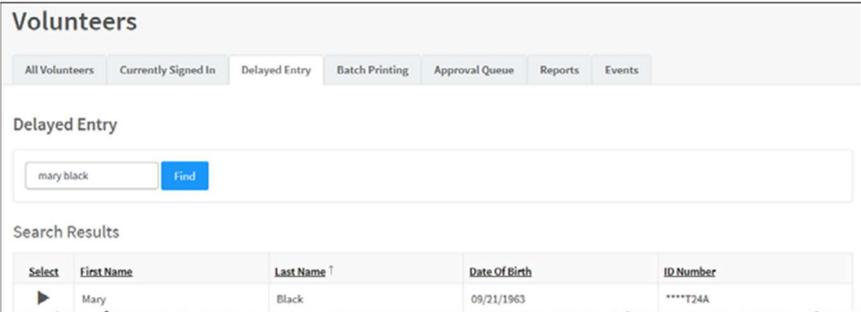
- To sign out a single volunteer, click **Sign Out** next to their name.
- To sign out multiple volunteers, select the **Enable Multi-Sign-Out** check box in the upper right corner, select the check box next to all the volunteers to be signed out, and then click **Sign Out**.

To return to single sign-out mode, clear the **Enable Multi-Sign-Out** check box.

Delayed Sign In and Sign Out

If you are unable to sign in or sign out volunteers due to equipment issues or internet connection issues, you can use the Delayed Entry feature to manually enter the sign-in and sign-out date and time. This feature allows users with the *Can Sign In Volunteers* permission to record the actual sign-in or sign-out times but the entry is delayed until the system is available. *This feature is not visible at the All Building level.*

1. Select the school from the Building Selector (you must select a specific building).
2. From the navigation menu, select **Modules > Volunteers** and click the **Delayed Entry** tab.
3. Enter the **First Name** or **Last Name** and click.
4. Select the person from the search results and complete the following information:
 - **Sign-In Date/Time*** – Select the date and time that the person actually signed in.
 - **Sign-Out Date/Time** – Select the date and time that the person actually signed out.
Note: The Sign-In Date and Sign-Out Date must be the same date.
 - **Function*** – From the drop-down list, select the reason the volunteer is signing in.
 - **Organization** – Select the organization associated with the volunteer.
5. Click **Submit**. A *Delayed Entry Successful* message displays in the lower right corner of the screen.



The screenshot shows the 'Volunteers' interface with the 'Delayed Entry' tab selected. A search bar contains 'mary black' and a 'Find' button. Below the search bar, the 'Search Results' section displays a table with one entry for 'Mary Black'.

Select	First Name	Last Name ↑	Date Of Birth	ID Number
▶	Mary	Black	09/21/1963	****T24A

Batch Printing

The Batch Printing feature enables users to run a batch of volunteers through the sex offender and custom alert checks, and then print their badges in advance of a school event where many people are expected to sign in for the same event at the same time.

Using this feature speeds up the sign in process for an event and helps prevent a long line of people at the Front Desk. When the volunteers arrive, you simply look at their ID and hand them their badge.

While running the batch, if one or more volunteers are flagged with an offender or custom alert, the user can view the alerts and decide if the person is a match. If they are a match, no badge is created and they will not be signed in at the time designated in the Batch Detail.

Add Batch Print Job

1. Select the school from the Building Selector (you must select a specific building).
2. From the navigation menu, select **Modules > Volunteers** and click the **Batch Printing** tab.
3. Click **Add Batch**. You can also copy a **Completed Batch** job and modify it to create a new batch job. See [Cloning Batch Print Job](#).
4. Enter the **Batch Name*** and optional **Batch Description**.
5. Select the **Sign-In Date/Time*** and **Sign-Out Date/Time***. *The Sign-In Date and Sign-Out Date must be the same date.*
6. Select the **Function*** and click **Save**.

The screenshot displays the 'Volunteers' management interface. At the top, there are navigation tabs: 'All Volunteers', 'Currently Signed In', 'Delayed Entry', 'Batch Printing', 'Approval Queue', 'Reports', and 'Events'. Below this, there are two main sections: 'Current Batches' and 'Completed Batches', each with a table of batch records. The 'Current Batches' table has columns for 'Details', 'Name', 'Sign-In D...', 'Sign-Out...', 'Printed', 'Not Printed', 'Alert Match', 'Status', and 'Options'. One batch is listed: 'PTA Bake Sale' with a sign-in time of 12/12/16 12:15 PM and a sign-out time of 12/12/16 2:45 PM. The 'Completed Batches' table has columns for 'Details', 'Name', and 'Sign-In'. Two batches are listed: 'After School Event' with a sign-in time of 08/08/16. An inset window titled 'Volunteers' shows the 'Batch Printing > Batch Detail' form. It includes a message: 'The chosen function will be printed on the volunteer's badge.' The form has fields for 'Batch Name', 'Batch Description', 'Sign In Date / Time', 'Sign Out Date / Time', and 'Function'. A 'Cancel' button is visible at the bottom.

Batch Printing, cont.

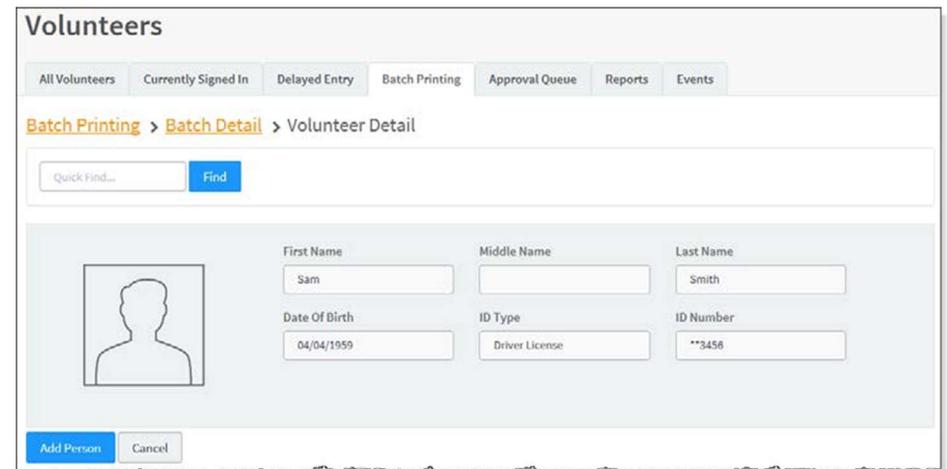
8. In the **Volunteer List** area, click **Add Volunteer**.



Details	First Name	Last Name	ID Number	Date Of Birth	Status	Status Date	Options
▶	Mary	Black	****T24A	09/21/1963	Not Printed	08/08/2016	🖨️ 🗑️
▶	Susan	Doyle	****3518	04/11/1957	Not Printed	08/08/2016	🖨️ 🗑️
▶	John	Doe		01/01/1981	Not Printed	08/08/2016	🖨️ 🗑️

Note: You can only add volunteers to the batch if they have previously signed in and have an official record in the Raptor system.

9. Enter the volunteer's name and click **Find**.
10. In the search results, click **Select** next to the volunteer's name.
11. On the **Volunteer Detail** workspace, click **Add Person**.
12. Repeat Step 8 and Step 11 for all volunteers to be added to the batch.



Volunteers

All Volunteers | Currently Signed In | Delayed Entry | Batch Printing | Approval Queue | Reports | Events

Batch Printing > Batch Detail > Volunteer Detail

Quick Find...

First Name: Middle Name: Last Name:

Date Of Birth: ID Type: ID Number:

Execute Batch Printing

You can execute and print the batch from either the **Batch Printing** workspace or the **Batch Detail** workspace.

1. Use one of the following methods to execute and print the batch:
 - From the **Current Batches** grid on the **Batch Printing** workspace, click the  icon in the **Options** column.
 - From the **Volunteers List** grid on the **Batch Print Details** workspace, click **Print Batch Now**.

2. On the **Print Confirmation** dialog, click **Continue**.

3. If a Possible Offender alert displays for any volunteer, review the information and determine if it is a match. See [Possible Offender and Custom Alerts](#).

If the volunteer is a match to an offender or custom alert, the badge will not be printed and the **Volunteer Excluded From Batch Print** dialog displays.

4. Click **Close** to continue.

When all the badges have printed, the number of printed badges printed displays on the **Batch printing is complete** dialog.

5. Click **Close** to complete the procedure.

Volunteers will automatically be signed in and signed out on the date and time specified in the Batch Print job.

Note: A batch print is not complete until both the sign-in and sign-out times have elapsed. Up until the sign-out time has elapsed, the batch print is still considered active and can be modified. Once the sign-out time has elapsed, the batch print is considered complete and will be moved to the **Completed Batches** grid.



Print Confirmation

School Event will be the function displayed on the volunteer badges.

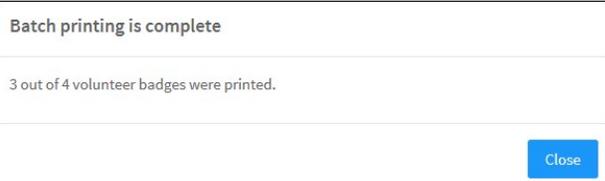
Cancel Continue



Volunteer Excluded From Batch Print

A badge will not be created for this volunteer. Any additional alerts for this volunteer will be skipped.

Close



Batch printing is complete

3 out of 4 volunteer badges were printed.

Close

Cloning Batch Print Job

The Clone Batch feature enables you to copy a **Completed Batch** job and modify it to create a new batch job. Perform the following procedure to clone a batch print job:

1. Select the school from the Building Selector (you must select a specific building).
2. From the navigation menu, select **Modules > Volunteers** and then click the **Batch Printing** tab.
3. In the **Completed Batches** grid, click **Clone** in the **Options** column for the batch job you want to copy.

Completed Batches							
Details	Name	Sign-In Date/Time	Sign-Out Date/Time	Volunteer Count	Status	Options	
▶	After School Event	08/08/16 3:15 PM	08/08/16 3:15 PM	3	Completed	Clone	
▶	Bake Sale	08/08/16 2:45 PM	08/08/16 5:30 PM	3	Completed	Clone	

4. On the **Batch Detail** workspace, enter the **Batch Name*** and optional **Batch Description**.
5. Select the **Sign-In Date/Time*** and **Sign-Out Date/Time***. *The Sign-In Date and Sign-Out Date must be the same date.*
6. Select the **Function*** and click **Save**.

View Application Status

Users with the *Can Approve Volunteers* permission can view the status of a volunteer's application as it goes through the approval process. This allows the volunteer coordinator to view the current state and take the necessary action.

1. From the navigation menu, select **Modules > Volunteers** and then click the **Approval Queue** tab.
2. In the **Approval Queue** grid, view the current state of the application in the **Status** column. The following statuses are available:

- **Processing** – The Raptor System is processing the application and no action can be taken until the processing is complete.
- **Action Required: Review Alert(s)** – This informs the Volunteer Coordinator that the applicant has one or more possible sex offender alerts; they need to review the alerts to determine if they are a match to the applicant.
- **Action Required: Review Background Check** – This informs the Volunteer Coordinator that a criminal record has been returned and they need to review it.
- **Action Required: Application on Hold** – This status is only associated with the Texas DPS; it displays when the Volunteer Coordinator has put the application on hold until more information can be obtained to approve the application.
- **Action Required: Complete Requirement(s)** – This status indicates that one or more requirements and/or required documents need to be reviewed and marked as complete before moving the application further through the process.
- **Action Required: Application Approval** – This status informs the Volunteer Coordinator that the application is ready for final approval.
- **Approved: Awaiting Expiration** – No action required from the Volunteer Coordinator. When the volunteer's current term expires, this new application will be applied to the volunteer's profile.

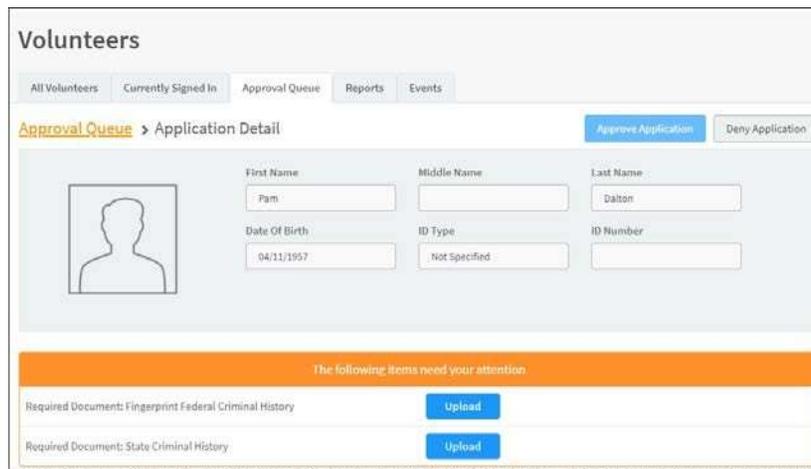


Details	Photo	First Name	Last Name	Date of Birth	Status
▶		Diana	Brodbery	04/04/1989	Processing
▶		Diana	Dare	01/05/1964	Action Required: Application Approval
▶		Susan	Doyle	04/11/1957	Action Required: Application on Hold

View Application Details

You can access and view the details of an application in the **Approval Queue** grid on the **Approval Queue** workspace.

1. From the navigation menu, select **Modules > Volunteers** and then click the **Approval Queue** tab.
2. In the **Approval Queue** grid, click the **h** icon in the **Details** column for the application.



Volunteers

All Volunteers | Currently Signed In | **Approval Queue** | Reports | Events

Approval Queue > Application Detail Approve Application Deny Application



First Name: Pam Middle Name: Last Name: Dalton

Date Of Birth: 04/21/1957 ID Type: Not Specified ID Number:

The following items need your attention

Required Document: Fingerprint Federal Criminal History Upload

Required Document: State Criminal History Upload

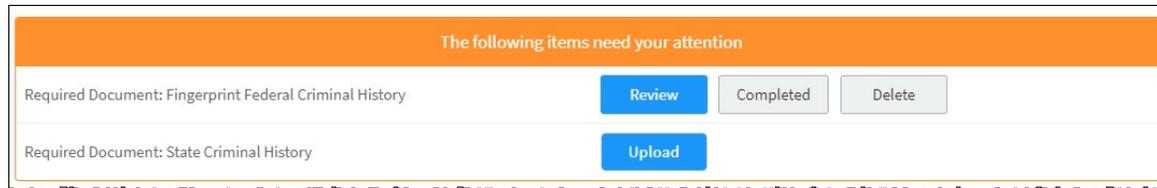
If the application requires attention prior to approval, the items that need to be addressed are displayed under the call to action banner.

For example, if an applicant must provide required documents for a function specified in their application, these items will be listed in this area. Also, if a possible offender alert has been triggered, you can review the alert here prior to approving the applicant. See [Possible Offender Alert for Volunteer Applicant](#).

In addition, if there are requirements associated with functions where an applicant has selected these functions, the requirements must be satisfied and marked as complete before you can complete the approval process.

View Application Details, cont.

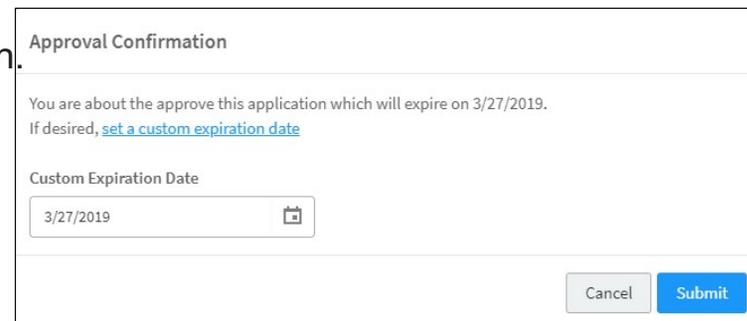
3. On the **Application Detail** workspace, if documentation is required prior to approval, click **Upload** and navigate to the document.



The following items need your attention

Required Document: Fingerprint Federal Criminal History	Review	Completed	Delete
Required Document: State Criminal History	Upload		

4. Once the document is uploaded, click **Review** to verify that everything is accurate, and then click **Completed** to indicate the requirement has been satisfied.
If you want to remove the document to replace it with another uploaded document, click **Delete**.
5. On the **Document Completed Confirmation** dialog, click **Continue**. The item is removed from the list.
6. After all items have been addressed, the call to action banner displays the message *Final application approval is required*.
7. Click **Approve Application**.
8. On the **Approval Confirmation** dialog, if you want to specify a custom expiration date, click the link and select the date from the calendar.
9. Click **Submit** to approve the application.



Approval Confirmation

You are about to approve this application which will expire on 3/27/2019.
If desired, [set a custom expiration date](#)

Custom Expiration Date

3/27/2019 

Cancel **Submit**

View Application History Log

The **History Log** grid on the **Application Detail** workspace displays the date/time of activity related to the volunteer application process. The History Log includes the date and time of the activity, the activity description and the name of the user performing the activity. Some activities that display in this log include:

- Application Submitted Online
- Background Check Submitted
- Alerts Ready for Review – Indicates there are possible sex offender alerts ready to be reviewed by a user with the *Can Approve Volunteers* permission.
- No Alerts – Indicates there are no possible sex offender alerts associated with the volunteer applicant.
- Awaiting Background Check Results – Indicates the background check is in progress and results have not yet been returned.
- Background Check Results Ready for Review – Indicates the background check has been returned but needs reviewed.
- Background Check Reviewed – Indicates the background check has been reviewed.
- Background Check Results – No Criminal Record – Indicates the background check returned no criminal record for the volunteer applicant.
- Requirement <name of requirement> Complete
- Application Approved

Timestamp	Activity	Performed By
12/16/16 5:28 PM	Application Submitted Online	Auto Process
12/16/16 5:28 PM	Background Check Submitted - WPS-1823853	Auto Process
12/16/16 5:28 PM	No Alerts	Auto Process
12/16/16 5:28 PM	Awaiting Background Check Results	Auto Process

View Required Documents

The **Required Documents** grid on the **Application Detail** workspace displays the required documents for volunteer applicants, the upload timestamp, status, the user who performed the upload and an option to preview the document.

To preview the document, click the  icon in the **Options** column.

Required Documents				
<u>Name</u>	<u>Upload Timestamp</u>	<u>Status</u>	<u>Performed By</u>	<u>Options</u>
Fingerprint Federal Criminal History	03/12/18 11:03 AM	Completed	Diana DistrictAdmin	
State Criminal History	03/12/18 11:11 AM	Completed	Diana DistrictAdmin	

Note: After an application has been approved or denied, the uploaded documents are still accessible from the application.

Possible Offender Alert for Applicant

If a Possible Offender Alert is generated from a volunteer applicant, the volunteer coordinator will be prompted to review the information before approving the applicant. The Offender Check for volunteer applications feature must be enabled by Raptor.

1. On the **Application Detail** workspace, click **Review**.
2. On the Possible Offender Alert dialog, analyze the search results. Because there can be multiple possible matches, it is very important that you carefully compare the information displayed on the screen for Volunteer and the Offender information.

It is recommended that you compare the address to verify a match. Not all states provide offender photos and details.

Note: Raptor also matches on offender alias names. If this occurs, an Alias Match message displays below the offender's photo.

3. Click **Match** or **No Match**.
 - If **Match**, click **Yes** to confirm or click **Cancel**.
 - If **No Match** and there are multiple records, the next possible match displays on screen.

The number of matches and the number of total Possible Offender Alerts are recorded in the **History Log** on the Volunteer Application, which will force the application to be manually approved (if the **Automatically Approve When Requirements Satisfied** feature is set to **Yes** on the **Volunteer Application Settings** workspace).

After the applicant has been reviewed, the volunteer coordinator can approve or deny the application. See [Manually Approve Application](#).

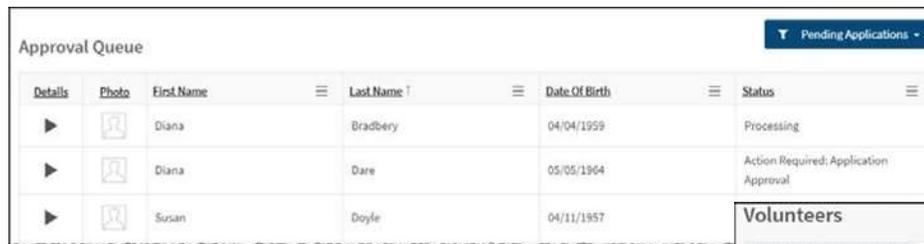
The screenshot shows the 'Volunteers' workspace with a navigation bar containing 'All Volunteers', 'Currently Signed In', 'Delayed Entry', 'Batch Printing', 'Approval Queue', 'Reports', and 'Events'. The 'Approval Queue' is selected, leading to the 'Application Detail' page. The page has two buttons: 'Approve Application' and 'Deny Application'. Below the buttons is a form with fields for 'First Name' (John), 'Middle Name', 'Last Name' (Doe), 'Date Of Birth' (01/01/1981), 'ID Type' (Driver's License), and 'ID Number'. A placeholder icon for a photo is on the left. Below the form is an orange banner with the text 'The following items need your attention.' and a 'Review' button. A small message below the banner reads 'Attention: One or more possible sex offender alerts must be reviewed.'

The screenshot shows the 'Possible Offender Alert' dialog. It has two buttons: 'Match' and 'No Match'. Below the buttons is the text 'Please confirm a match based on the information below.' and '1 of 12'. The dialog is split into two columns: 'VOLUNTEER' and 'OFFENDER'. The 'VOLUNTEER' column shows a placeholder icon and the following information: First Name: John, Middle Name, Last Name: Doe, Date Of Birth: 01/01/1981. The 'OFFENDER' column shows a photo of a man and the following information: First Name: John, Middle Name: Christopher, Last Name: Doe, Date Of Birth: 01/01/1981, Gender, Eye Color: BLUE, Race: WHITE, Hair Color: BLONDE, Height: 6'03", Weight: 245, Street: 300 Main ST, State: AL, Zip: 36234, and Offender State Registry: AA. A link 'Click here for more information.' is at the bottom.

Manually Approve Application

Volunteer Coordinators can manually approve or deny a volunteer application from the Approval Queue.

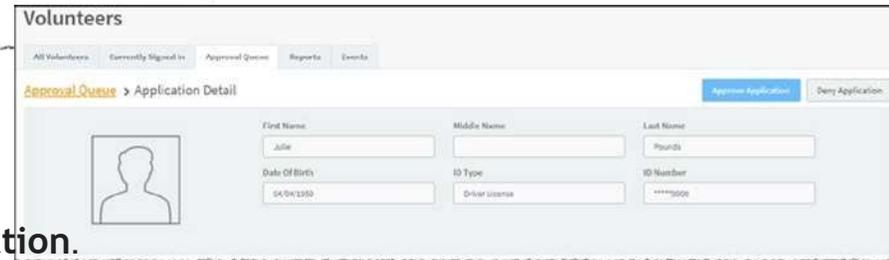
1. In the **Approval Queue** grid, select **Pending Applications** from the **Filter** drop-down list.



Details	Photo	First Name	Last Name	Date Of Birth	Status
▶		Diana	Bradbery	04/04/1959	Processing
▶		Diana	Dare	05/05/1964	Action Required: Application Approval
▶		Susan	Doyle	04/11/1957	

2. In the Details column, click the  icon for the volunteer applicant.

3. On the **Application Detail** workspace, click **Approve Application** or **Deny Application**.



Volunteers

All Volunteers | Currently Signed In | Approval Queue | Reports | Events

Approval Queue > Application Detail

Approve Application | Deny Application

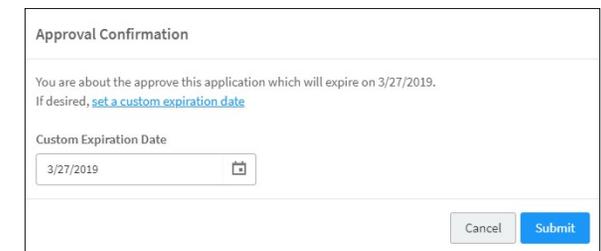
First Name: Julie | Middle Name: | Last Name: Pounds

Date Of Birth: 04/04/1959 | ID Type: Driver License | ID Number: *****

- If you click **Approve Application**, the **Approval Confirmation** dialog displays. Click **Submit** to approve the application or **Cancel** to cancel the action.

If you want to specify a custom expiration date, click the link and select the date from the calendar.

- If you click **Deny Application**, the **Reason for denial** dialog displays. Enter the reason why the application has been denied and then click **Continue**. If you want to cancel your action, click **Cancel**.



Approval Confirmation

You are about to approve this application which will expire on 3/27/2019.
If desired, [set a custom expiration date](#)

Custom Expiration Date

3/27/2019

Cancel | Submit

Manually Approve Application, cont.

If the Volunteer Portal is enabled, a user account will be automatically created for the Volunteer Portal and an email with instructions on how to log in is sent to the volunteer applicant.

If the automated process is unable to create a Volunteer Portal user account, the volunteer coordinator can manually create a user account for the Volunteer Portal. See [Create Volunteer Portal User Account](#).

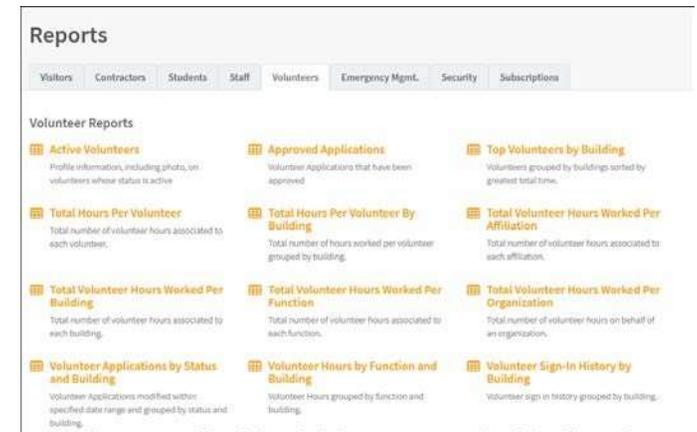
Notes:

- For active volunteers that have submitted new applications that have been approved, the volunteer's profile will not be updated with the information on the new application until their expiration date, at which time their volunteer profile will be replaced with information from the newly approved application.
- Applicants with possible sex offender alerts, a returned criminal record, or under age 18 will require manual approval even if the *Automatically Approve When Requirements Satisfied* setting is enabled.

Volunteer Reports

Use the **Reports** tab to run reports for volunteer activity. The following Volunteer reports are available:

- **Active Volunteers** – Profile information for volunteers with active status, including photo.
- **Approved Applications** – Volunteers that have gone through the approval process.
- **Top Volunteers by Building** – Volunteers grouped by buildings and sorted by greatest total time.
- **Total Hours Per Volunteer** – Total number of volunteer hours associated to each volunteer.
- **Total Hours Per Volunteer By Building** – Total number of hours worked per volunteer grouped by building.
- **Total Volunteer Hours Worked Per Affiliation** – Total number of volunteer hours associated to each affiliation.
- **Total Volunteer Hours Worked Per Building** – Total number of volunteer hours associated to each building.
- **Total Volunteer Hours Worked Per Function** – Total number of volunteer hours associated to each function.
- **Total Volunteer Hours Worked Per Organization** – Total number of volunteer hours on behalf of an organization.
- **Volunteer Applications by Status and Building** – Volunteer applications modified within specified date range and grouped by status and building.
- **Volunteer Hours by Function and Building** – Volunteer hours grouped by function and building.
- **Volunteer Sign-In History by Building** – Volunteer sign in history grouped by building.

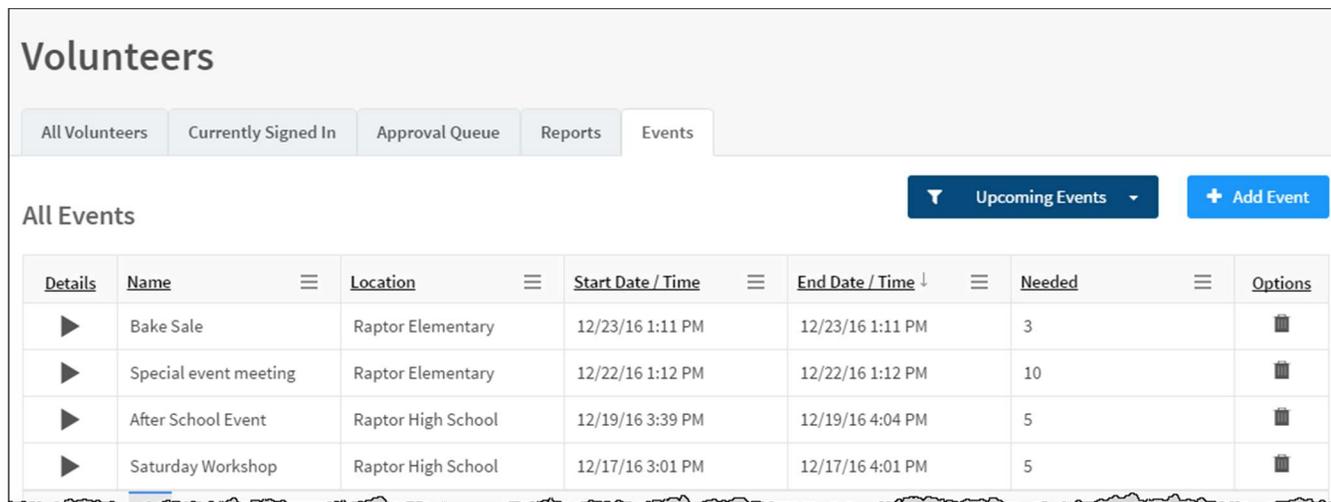


See [Running Reports](#) for more information.

Volunteer Events

The **Events** tab is used by the Volunteer Coordinator to manage events, such as creating an event, viewing all events, modifying an event and deleting an event. You must have the *Can Manage Events* permission to see this tab.

You can view all the events on the **All Event** workspace. Use the **Filter** drop-down to narrow the search for specific events. You can filter to display Scheduled Events, Past Events and All Events.



The screenshot shows the 'Volunteers' interface with the 'Events' tab selected. Below the tabs, there is a filter dropdown set to 'Upcoming Events' and an 'Add Event' button. The main content is a table with the following data:

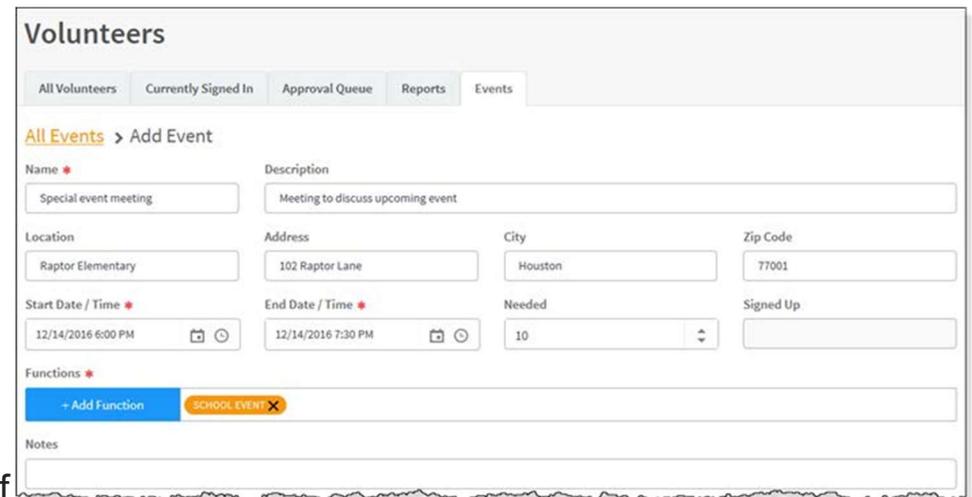
Details	Name	Location	Start Date / Time	End Date / Time ↓	Needed	Options
▶	Bake Sale	Raptor Elementary	12/23/16 1:11 PM	12/23/16 1:11 PM	3	🗑️
▶	Special event meeting	Raptor Elementary	12/22/16 1:12 PM	12/22/16 1:12 PM	10	🗑️
▶	After School Event	Raptor High School	12/19/16 3:39 PM	12/19/16 4:04 PM	5	🗑️
▶	Saturday Workshop	Raptor High School	12/17/16 3:01 PM	12/17/16 4:01 PM	5	🗑️

Add Volunteer Events

Volunteer events can be created at the building level or client level (All Buildings).

1. From the navigation menu, select **Modules > Volunteers** and then click the **Events** tab.
2. On the **All Events** workspace, click **Add Event** and complete the following:

- **Name***
- **Description**
- **Location**
- **Address**
- **City/Zip Code**
- **Start Date/Time*** – Select the date and time the event starts.
- **End Date/Time*** – Select the date and time the event ends.
- **Needed** – Select the number of volunteers needed to help with the event.
- **Signed Up** – *Read-only*. Indicates the number of volunteers who have already signed up for the event.
- **Functions*** – Click **Add Function** and select the type of event from the drop-down list.
- **Notes** – Enter any additional notes about the event.



The screenshot shows the 'Volunteers' interface with the 'Events' tab selected. The 'Add Event' form is displayed with the following fields and values:

- Name:** Special event meeting
- Description:** Meeting to discuss upcoming event
- Location:** Raptor Elementary
- Address:** 102 Raptor Lane
- City:** Houston
- Zip Code:** 77001
- Start Date / Time:** 12/14/2016 6:00 PM
- End Date / Time:** 12/14/2016 7:30 PM
- Needed:** 10
- Signed Up:** (empty)
- Functions:** A dropdown menu is open showing 'SCHOOL EVENT' selected.
- Notes:** (empty)

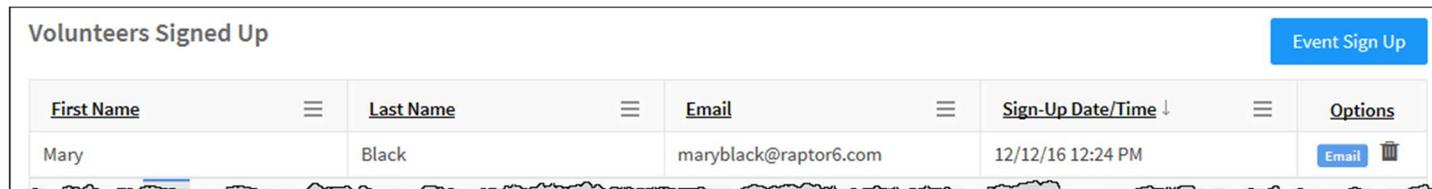
3. Click **Save**.

View Volunteers Signed Up for Event

Volunteer Coordinators can view who has signed up to volunteer for an event from the **Event Detail** workspace.

Note: You must have the Raptor Volunteer Management System enabled to see this feature.

1. From the navigation menu, select **Modules > Volunteers** and then click the **Events** tab.
2. On the **All Events** workspace, click the **h** icon next the event you want view.
3. On the **Event Detail** workspace, you can view the number of volunteers who have signed up for the event in the **Signed Up** field in the upper portion of the workspace.
4. Navigate to the **Volunteers Signed Up** grid to view the volunteers who have signed up for the event.



First Name	Last Name	Email	Sign-Up Date/Time ↓	Options
Mary	Black	maryblack@raptor6.com	12/12/16 12:24 PM	Email 

Remove Volunteers Signed Up for Event

To remove a volunteer who has signed up for an event and reset the **Signed Up** number to reflect the change:

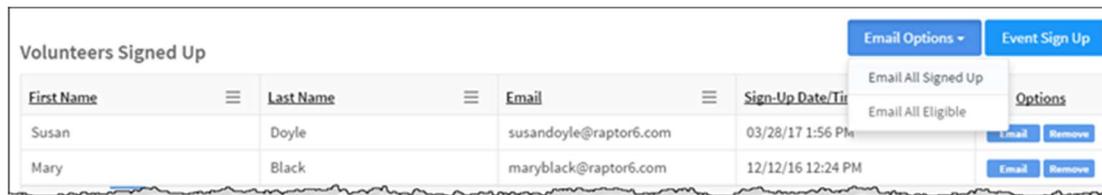
1. Click **Remove** in the **Options** column and then click **Yes** on the **Removal Confirmation** dialog.
2. On the **Email Removed Volunteer** dialog, complete the **Message** and click **Send**.

If the volunteer does not have an email address in their profile, the **To** field displays null. Click **Cancel** to cancel the email.

Send Email to Volunteers

Users with the *Can Manage Events* permission can send an email to all volunteers who have signed up for a specific event or to all eligible volunteers from the **Events** tab.

1. From the navigation menu, select **Modules > Volunteers** and then click the **Events** tab.
2. On the **All Events** workspace, click the **h** icon next to the event to expand the **Event Detail**.



The screenshot shows a table titled "Volunteers Signed Up" with columns for First Name, Last Name, Email, and Sign-Up Date/Time. Two rows are visible: Susan Doyle (susandoyle@raptor6.com, 03/28/17 1:56 PM) and Mary Black (maryblack@raptor6.com, 12/12/16 12:24 PM). An "Email Options" dropdown menu is open over the table, showing "Email All Signed Up" and "Email All Eligible" options. There are also "Event Sign Up" and "Options" buttons visible.

First Name	Last Name	Email	Sign-Up Date/Time
Susan	Doyle	susandoyle@raptor6.com	03/28/17 1:56 PM
Mary	Black	maryblack@raptor6.com	12/12/16 12:24 PM

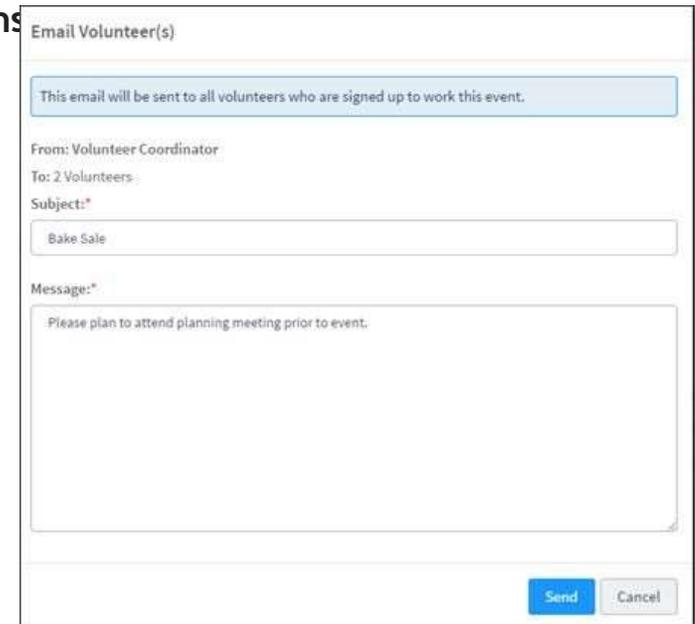
3. In the **Volunteers Signed Up** grid, click **Email Options** and select one of the following:

- **Email All Signed Up** – Select this option to send an email to all volunteers who are signed up for the event.
- **Email All Eligible** – Select this option to send an email to all eligible volunteers who can volunteer for the event.

To send an email to an individual volunteer who is signed up for the event, click **Email** in the **Options** column.

Note: If the volunteer does not have an email address in their profile, the **Email** button does not display.

4. Enter the email **Subject** and **Message**, and then click **Send**.



The screenshot shows the "Email Volunteer(s)" form. It includes a text area for the email body, a "From" field set to "Volunteer Coordinator", a "To" field set to "2 Volunteers", and a "Subject" field with the text "Bake Sale". The "Message" field contains the text "Please plan to attend planning meeting prior to event." There are "Send" and "Cancel" buttons at the bottom right.

Sign Up Volunteers for Event

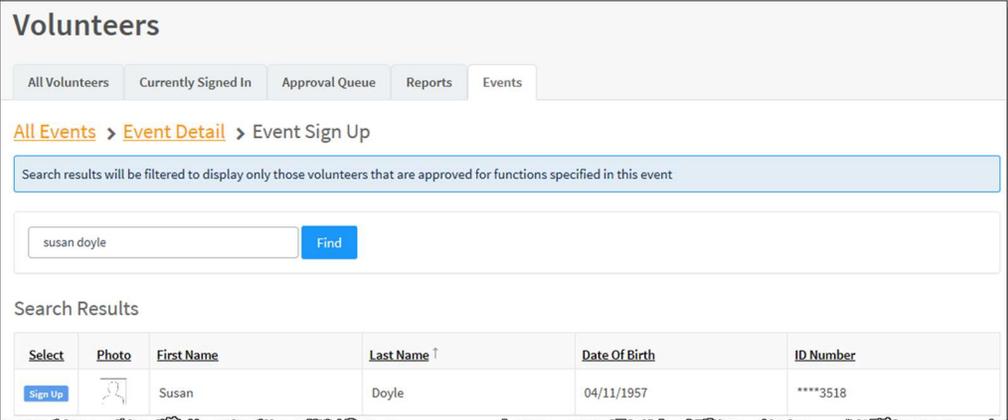
Volunteer Coordinators can view who has signed up to volunteer for an event from the **Event Detail** workspace.

Note: You must have the Raptor Volunteer Management System enabled to see this feature.

1. From the navigation menu, select **Modules > Volunteers** and then click the **Events** tab.
2. On the **All Events** workspace, click the **H** icon for the event.
3. On the **Event Detail** workspace, navigate to the **Volunteers Signed Up** grid and click **Event Sign Up**.
4. Enter the volunteer's **First** and/or **Last Name** and click **Find**.
5. In the **Search Results**, click **Sign Up** next to the volunteer's name.

Note: Only those volunteers that match the search criteria and the Functions selected in the event detail will be returned in the Search Results.

The volunteer displays in the **Volunteers Signed Up** grid for the event and the number in the **Signed Up** field increments.



The screenshot displays the 'Volunteers' section of the Raptor Volunteer Management System. It features a navigation menu with tabs for 'All Volunteers', 'Currently Signed In', 'Approval Queue', 'Reports', and 'Events'. The current view is 'Event Sign Up' under 'Event Detail'. A search bar contains the text 'susan doyle' and a 'Find' button. Below the search bar, a message states: 'Search results will be filtered to display only those volunteers that are approved for functions specified in this event'. The search results are displayed in a table with the following columns: 'Select', 'Photo', 'First Name', 'Last Name', 'Date Of Birth', and 'ID Number'. The table contains one row for a volunteer named Susan Doyle, with a 'Sign Up' button next to her name.

Select	Photo	First Name	Last Name	Date Of Birth	ID Number
Sign Up		Susan	Doyle	04/11/1957	****3518