Samaritan™
Technologies

**Draft**

# 7.6
# eCoordinator
Volunteer Coordination Software

# Training Guide

# Training Guide

**© 2016 Samaritan Technologies**

All rights reserved. No parts of this work may be reproduced in any form or by any means - graphic, electronic, or mechanical, including photocopying, recording, taping, or information storage and retrieval systems - without the written permission of the publisher.

Products that are referred to in this document may be either trademarks and/or registered trademarks of the respective owners. The publisher and the author make no claim to these trademarks.

While every precaution has been taken in the preparation of this document, the publisher and the author assume no responsibility for errors or omissions, or for damages resulting from the use of information contained in this document or from the use of programs and source code that may accompany it. In no event shall the publisher and the author be liable for any loss of profit or any other commercial damage caused or alleged to have been caused directly or indirectly by this document.

Printed: February 2016 in Salt Lake City, Utah.

**Publisher**
*Samaritan Technologies*

**Notable Contributors**
*Bruce Behymer*
*Mike Brady*
*Bob Henline*
*Keith Leonard*
*Todd McMullin*

**Cover Designer**
*Joseph Wecker*

**Special thanks to:**

*All the people who contributed to this document including Todd, Bob, Keith and all others who made this manual possible.*

*Last not least, we want to thank the amazing organizations that have stood by this product and who have helped to make it what it is today.*

# Table of Contents

Part 1 Introduction & Product Orientation 2

1 Training Methodology 2
2 Trainer Instructions 3
3 Pre-Training Checklist 5
4 Product Orientation 6
  eRecruiter Introduction 6
    eRecruiter Demonstration 6
    eRecruiter Practice 6
    eRecruiter Review 6
  eCoordinator Introduction 6
  System Review 6
  eCoordinator Basic Navigation 6
    Main Tabs 6
    Menu Bar 6
    Function Buttons 6
  Basic Navigation Demonstration 6
    Menu Bar Tour 6
    Function Button Tour 6
  Basic Navigation Practice 6
  Basic Navigation Review 6

Part 2 Data Entry 26

1 Data Entry Demonstration: Organization 26
2 Data Entry Practice: Organization 34
3 Data Entry Demonstration: Opportunity 35
4 Data Entry Practice: Opportunity 53
5 Data Entry Review: Opportunity 53
6 Data Entry Demonstration: Volunteers 54
7 Data Entry Practice: Volunteers 68
8 Data Entry Review: Volunteers 68
9 Data Entry Demonstration: Client 69
10 Data Entry Practice: Client 76

11 Data Entry Review: Client . . . 76

Part 3 Advanced Navigation . . . 80

1 Data Sorting Demonstration . . . 80
2 Column Searches Demonstration . . . 81
3 Folders Demonstration . . . 82
4 Advanced Navigation Practice . . . 84
5 Advanced Navigation Review . . . 85

Part 4 Named Searches . . . 88

1 Named Searches Demonstration . . . 88
2 Named Searches Practice . . . 92
3 Named Searches Review . . . 93

Part 5 Named Grids . . . 96

1 Named Grids Demonstration Part 1 . . . 96
2 Named Grids Part 1 Practice . . . 100
3 Named Grids Demonstration Part 2 . . . 100
4 Named Grids Part 2 Practice . . . 103
5 Named Grids Review . . . 104

Part 6 Email System . . . 106

1 Email Demonstration . . . 106
2 Email Practice . . . 112
3 Email Review . . . 113

Part 7 Volunteer Referrals and Placements . . . 116

1 Referral and Placement Demonstration . . . 117
2 Referral and Placement Practice . . . 123
3 Referral and Placement Review . . . 124

Part 8 Scheduling System . . . 126

1 Scheduling Demonstration Part 1 . . . 130
2 Scheduling Part 1 Practice . . . 134
3 Scheduling Demonstration Part 2 . . . 135
4 Scheduling Part 2 Practice . . . 137
5 Scheduling Review . . . 137

Part 9 Log Book System . . . 140

1 Log Book Demonstration . . . 140
2 Log Book Practice . . . 142
3 Log Book Data Entry Demonstration . . . 143
4 Log Book Data Entry Practice . . . 144
5 Log Book Review . . . 145

**Part 10 Reporting System . . . 148**

1 Reporting Demonstration . . . 149
Data Grid Reports . . . 149
2 Reporting Practice . . . 152
3 Reporting Review . . . 153

**Part 11 Conclusion . . . 156**

**Part 12 Glossary . . . 158**

**Index . . . 0**

## Part I

# Introduction & Product Orientation

# 1 Introduction & Product Orientation

This guide will help you discover and use eCoordinator effectively. It is designed to support specific tasks that you will perform on a regular basis. The skills taught in this guide build on one another so it is important to learn them in the order they are presented.

We will use a basic training methodology designed to structure and maximize your learning experience. As you learn each skill you will see icons that represent the methodology. Some skills may repeat the process multiple times.

Objectives for the training presented in this guide include a logically ordered presentation of the tasks that you will be performing as a volunteer coordinator. Here is a simplified list of those tasks and objectives:

1. Data Entry: enter information for organizations, opportunities, volunteers and clients into the database
2. Finding Data: grids and searches will help you sort through your data
3. Communication: post your opportunities online and email your volunteers
4. Matching: connect volunteers and clients with opportunities
5. Log books: collect hours and other information after service has been rendered
6. Reports: create reports based on the log books

Please note that this guide is designed to speak to a broader audience. Therefore, the terms you encounter throughout the course of this training will be the generic, or system default terms. For example, some of our customers prefer the term "participant" over "volunteer." Others may substitute "refer" and "place" with "request" and "assign." Due to the customizable nature of the system, trainers must help students identify the differences, and appropriate their dialogue accordingly. You may see items in this training that you have elected to turn off in your own system.

If you have any questions, comments, feedback or require any other assistance, please contact:

**Samaritan Technologies Client Services***
Phone: 1-888-904-6060 option 4
Email: support@samaritan.com

*Office hours are Monday through Friday, 8:00 am-5:00 pm Mountain Time (Mountain Time Zone observes Daylight Saving Time).

This training will cover the basics for the eCoordinator and eRecruiter systems. However, the system includes additional functionality that you can learn more about in the User's Manual, as accessed from the Menu> Help> Help file. These include Sign-In, the Approver's System, Automatic Email Alerts, User Defined Fields, and Surveys, among others.

## 1.1 Training Methodology

Each skill presentation will follow this logic:

I Intro

1. **Introduce:** Instructor provides a brief explanation of how the feature works and why it is useful.

D Demo

2. **Demonstrate:** Instructor shows you how to perform the skill.

P Practice

3. **Practice:** Exercises to help you learn the skill in practical ways.

R Review

4. **Review:** YOU summarize how and when to use the skill.

You will guide students through each skill, though they are encouraged to return to this manual to repeat skills with which they may need help.

## 1.2 Trainer Instructions

There are two versions of this handbook, one for trainers and another for trainees/users. This trainer version includes additional instructions on how to provide training in a classroom setting as well as answers to the review quizzes at the end of each section. The user version is written so that the user can review it at any time to learn more about each function.

All trainer instructions are shown in this manual in shaded boxes:

Example of Trainer Instruction Window. Trainer Instruction Windows are shaded dark gray with white text.

Trainer Instruction Windows differ from User Instruction Windows:

Example of User Instruction Window. User Instruction Windows are transparent with black text.

**Types of Instructions:**

- **Action:** Instructs you on which actions to take.

- **Activity:** Instructs you to initiate an activity with the class.
- **Discussion:** Instructs you to lead a class discussion.
- **Mention:** Instructs you to highlight a specific item or concept.
- **Special Instructions:** Things *only you* need to know.

**Consistent Structure:**

Throughout the training you will present the material using the **I**ntroduce, **D**emonstrate, **P**ractice, and **R**eview structure referenced earlier. In several cases, with more complex skills, there are multiple demonstration and practice sessions between the introduction and review sections in a chapter. Following this outline precisely is required even if you have students who can learn the material rapidly.

**Consistent Presentation:**

In addition to knowing this material you must also be familiar with the way it is traditionally taught. While each trainer may have their own style, consistency is critical.

## 1.3 Pre-Training Checklist

Before you begin a training class, you should:

- o Create a *volunteer* login in the system for a volunteer that has self-referred to opportunities, and has been scheduled with and placed with opportunities
- o Create an eCoordinator login for yourself in the system with pre-made named searches and grids that support the instruction of “Named Searches" and "Named Grids”
- o Using the eCoordinator login that you created for yourself, include pre-made schedule slots that support the instruction of “Scheduling System”
- o Create new eCoordinator logins--one for each expected trainee (and maybe a few extra)
- o Clear out any volunteers, opportunities, programs, grids and folders in the system from previous trainings, if any

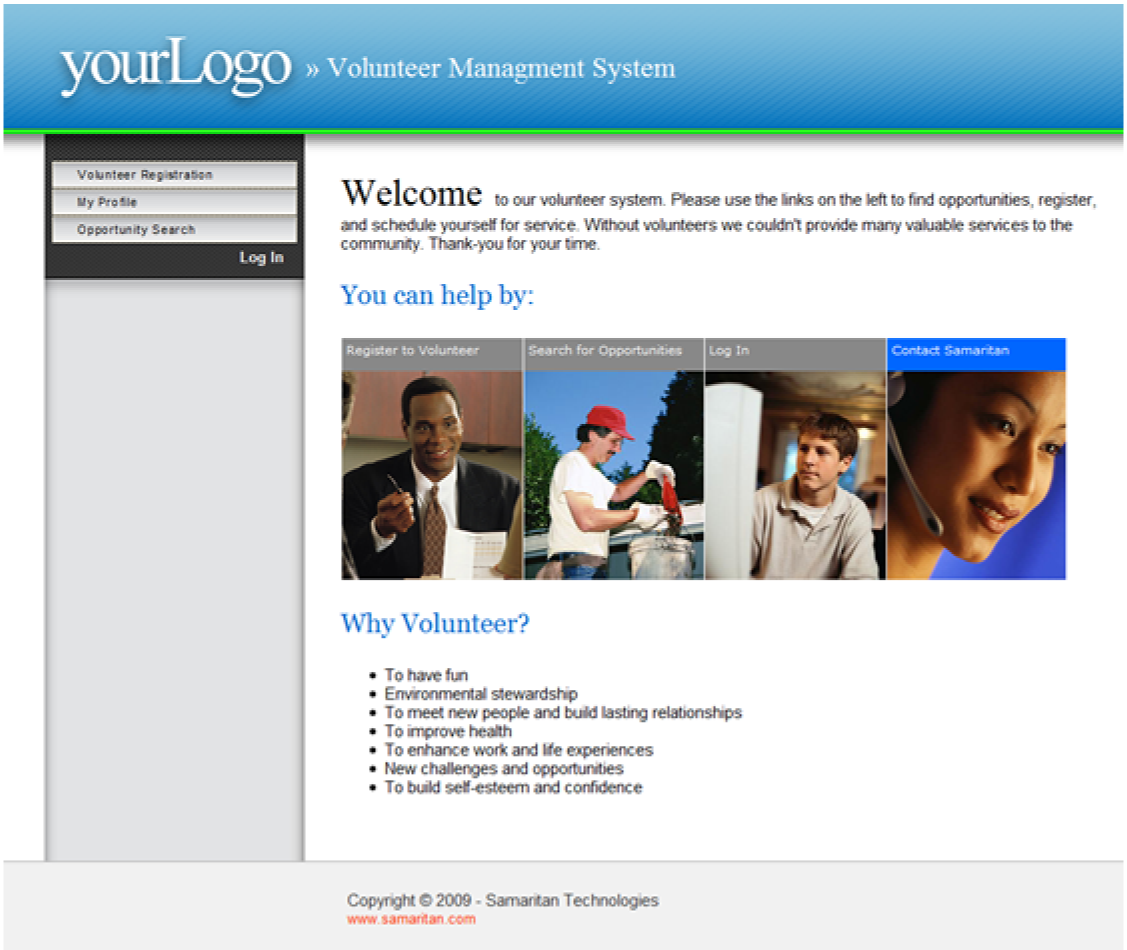
Before you attend a training class, you should:

- o Know how to browse the Internet, go to websites, and specifically use Internet Explorer
- o Have at least a cursory knowledge of Notepad and a spreadsheet software (e.g., Microsoft Excel)
- o Know some basic clipboard keyboard commands:
  - Select All: Ctrl+A
  - Copy: Ctrl+C or Ctrl+Insert
  - Paste: Ctrl+V or Shift+Insert

## 1.4 Product Orientation

The typical volunteer management system consists of two *integrated* parts:

1. An eRecruiter website. eRecruiter is a product of Samaritan Technologies that integrates with your website, offering a portal for volunteers (or potential volunteers) to register, browse for opportunities, etc. Additionally, organizations with whom you have partnered may register organization and opportunity profiles.


yourLogo » Volunteer Managment System
Volunteer Registration
My Profile
Opportunity Search
Log In
Register to Volunteer
Search for Opportunities
Log In
Contact Samaritan

Welcome to our volunteer system. Please use the links on the left to find opportunities, register, and schedule yourself for service. Without volunteers we couldn't provide many valuable services to the community. Thank-you for your time.

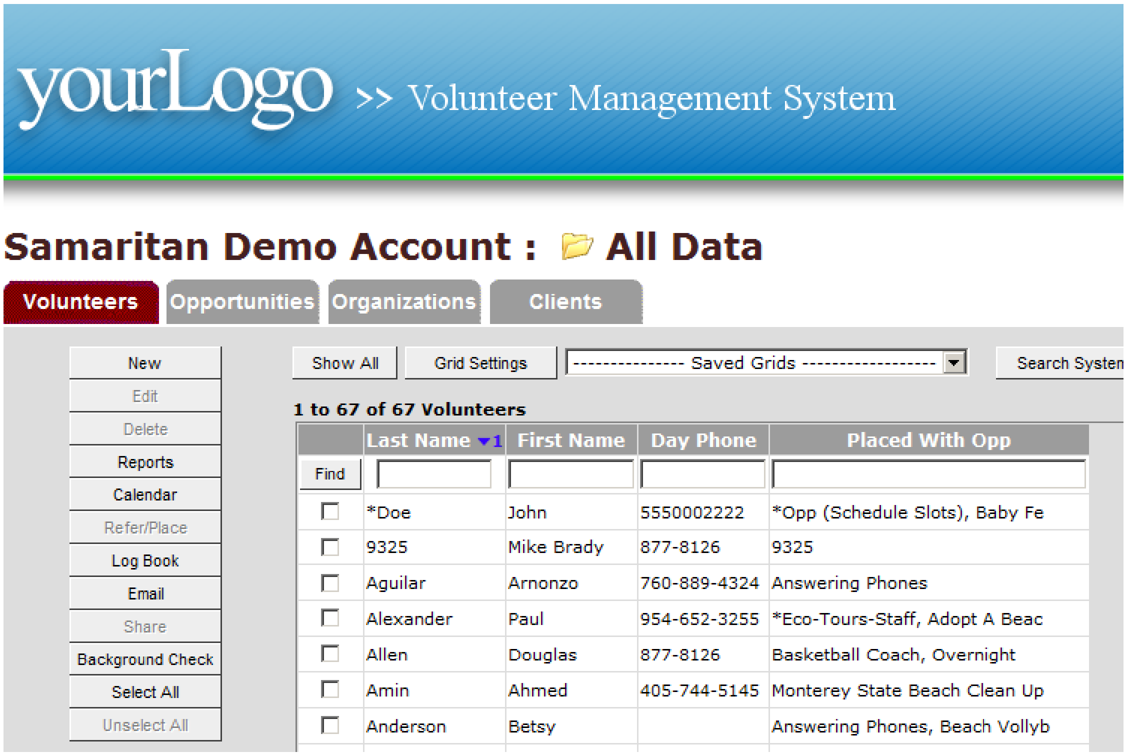
You can help by:

Why Volunteer?

- To have fun
- Environmental stewardship
- To meet new people and build lasting relationships
- To improve health
- To enhance work and life experiences
- New challenges and opportunities
- To build self-esteem and confidence

Copyright © 2009 - Samaritan Technologies
www.samaritan.com

2. An integrated volunteer coordination software called eCoordinator


yourLogo >> Volunteer Management System
Samaritan Demo Account : All Data
Volunteers
Opportunities
Organizations
Clients
New
Edit
Delete
Reports
Calendar
Refer/Place
Log Book
Email
Share
Background Check
Select All
Unselect All
Show All
Grid Settings
--------------- Saved Grids ------------------
Search Systen
Find

1 to 67 of 67 Volunteers

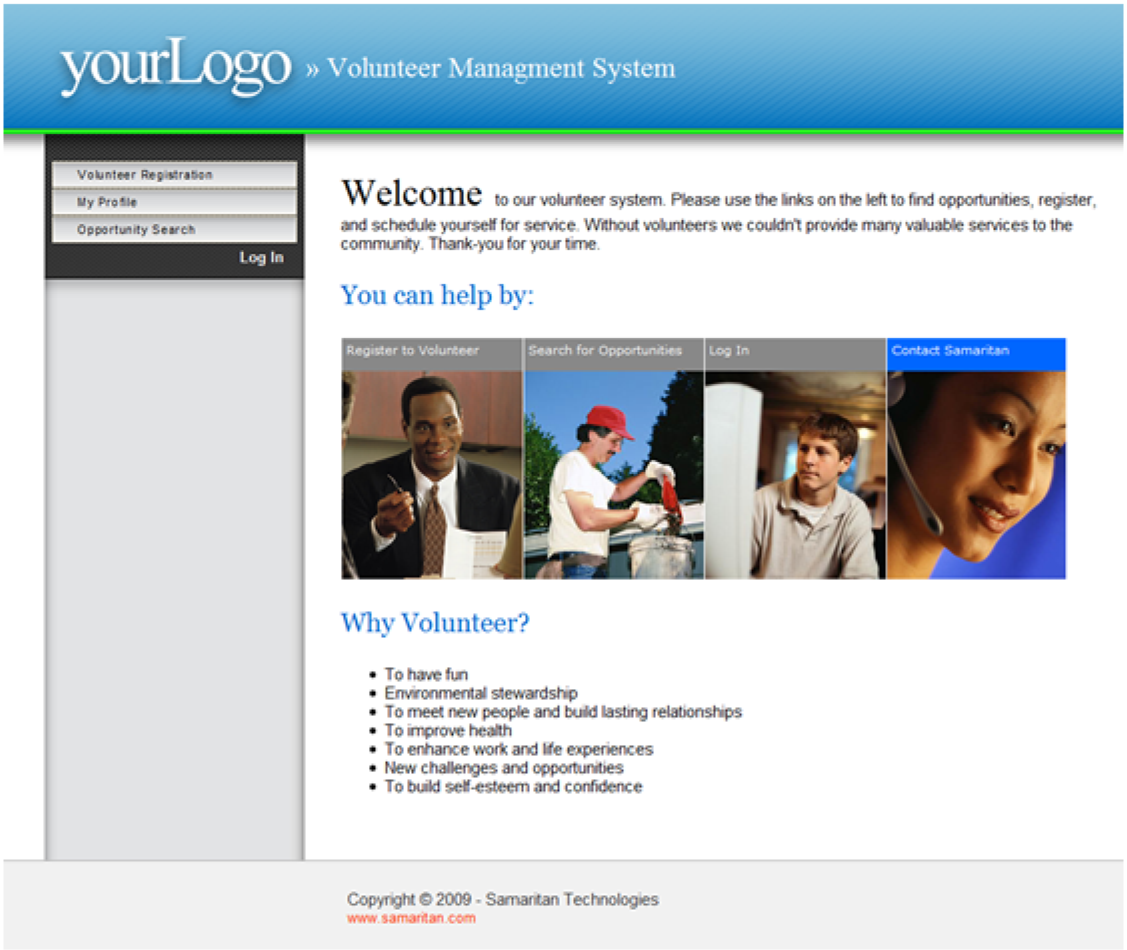
| | Last Name ▾1 | First Name | Day Phone | Placed With Opp |
|---|---|---|---|---|
| ☐ | *Doe | John | 5550002222 | *Opp (Schedule Slots), Baby Fe |
| ☐ | 9325 | Mike Brady | 877-8126 | 9325 |
| ☐ | Aguilar | Arnonzo | 760-889-4324 | Answering Phones |
| ☐ | Alexander | Paul | 954-652-3255 | *Eco-Tours-Staff, Adopt A Beac |
| ☐ | Allen | Douglas | 877-8126 | Basketball Coach, Overnight |
| ☐ | Amin | Ahmed | 405-744-5145 | Monterey State Beach Clean Up |
| ☐ | Anderson | Betsy | | Answering Phones, Beach Vollyb |

We will begin training with an introduction to the eRecruiter so that you can see the tool that volunteers will be using. These images are from a generic eRecruiter. Your eRecruiter will match the look and feel of your own website.

### 1.4.1 eRecruiter Introduction

Intro

The eRecruiter website is available to the public. Anyone can find service opportunities, register, and return later to check their schedules, report service hours and view suggestions on new ways to get involved.


yourLogo » Volunteer Managment System
Volunteer Registration
My Profile
Opportunity Search
Log In
Register to Volunteer
Search for Opportunities
Log In
Contact Samaritan

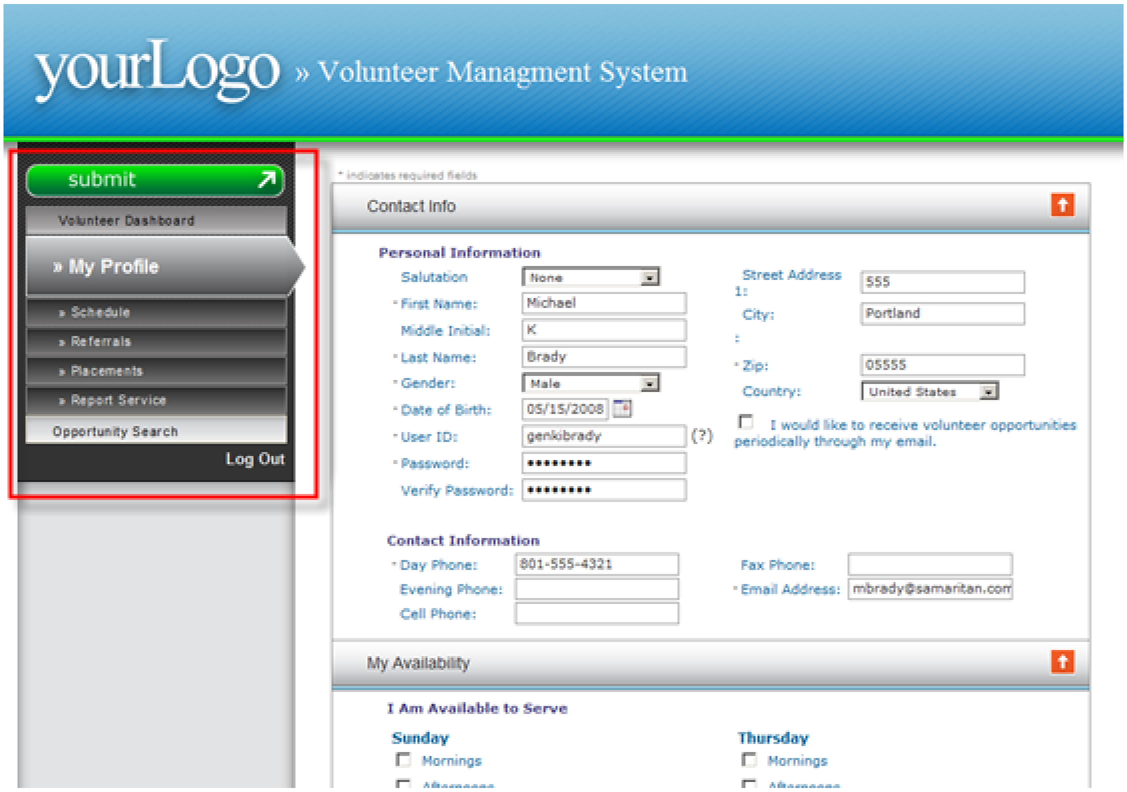
Welcome to our volunteer system. Please use the links on the left to find opportunities, register, and schedule yourself for service. Without volunteers we couldn't provide many valuable services to the community. Thank-you for your time.

You can help by:

Why Volunteer?

- To have fun
- Environmental stewardship
- To meet new people and build lasting relationships
- To improve health
- To enhance work and life experiences
- New challenges and opportunities
- To build self-esteem and confidence

Copyright © 2009 - Samaritan Technologies
www.samaritan.com


yourLogo » Volunteer Managment System
submit
Volunteer Dashboard
» My Profile
» Schedule
» Referrals
» Placements
» Report Service
Opportunity Search
Log Out
Contact Info
My Availability

* indicates required fields

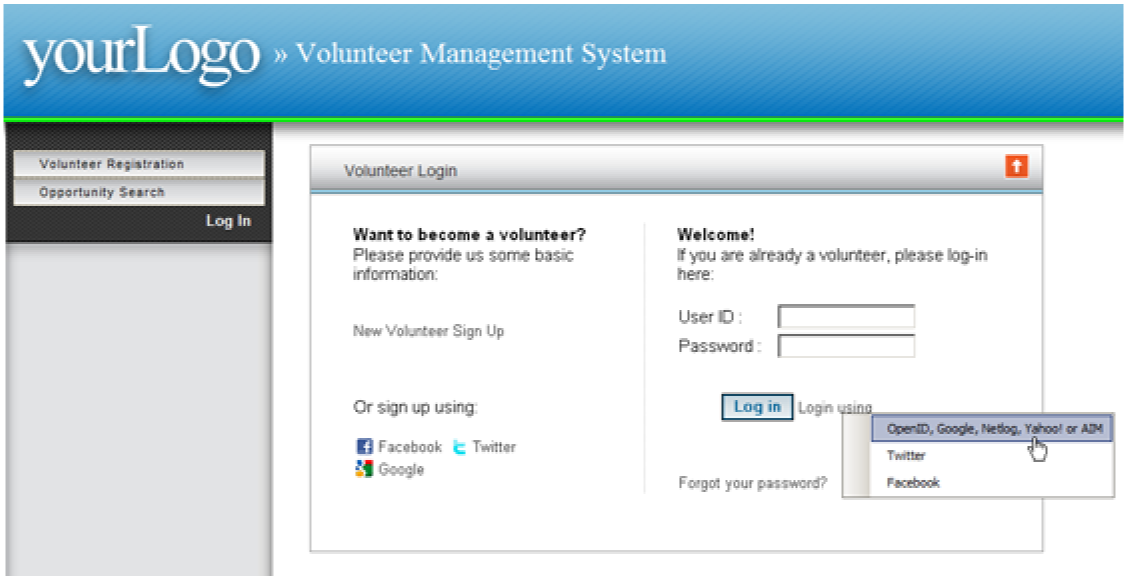
**Personal Information**
Salutation: None
* First Name: Michael
Middle Initial: K
* Last Name: Brady
* Gender: Male
* Date of Birth: 05/15/2008
* User ID: genkibrady (?)
* Password: ••••••••
Verify Password: ••••••••
Street Address 1: 555
City: Portland
* Zip: 05555
Country: United States
☐ I would like to receive volunteer opportunities periodically through my email.

**Contact Information**
* Day Phone: 801-555-4321
Evening Phone:
Cell Phone:
Fax Phone:
* Email Address: mbrady@samaritan.com

**I Am Available to Serve**
Sunday
☐ Mornings
Thursday
☐ Mornings

The “Volunteer Menu" is for volunteers to use when searching for opportunities, reviewing placements, checking schedules and reporting service. Volunteers create a User ID and password when they register for the first time.

eRecruiter can also be accessed using some of the more popular social networking websites. Volunteers may sign up or login using passwords they have already created for Facebook, Google, Twitter, etc. Starting with version 6.9.2, volunteers may subscribe to an RSS feed of your eRecruiter, with newly-published opportunities appearing in their feed reader.


yourLogo » Volunteer Management System
Volunteer Registration
Opportunity Search
Log In
Volunteer Login
New Volunteer Sign Up
Facebook
Twitter
Google
User ID :
Password :
Log in
Login using
OpenID, Google, Netlog, Yahoo! or AIM
Twitter
Facebook
Forgot your password?

**Want to become a volunteer?**
Please provide us some basic information:

Or sign up using:

**Welcome!**
If you are already a volunteer, please log-in here:

**Organization eRecruiter:** One function of eRecruiter available as of version 6.9 is the Organization eRecruiter. This functionality allows your partner organizations to register an organization or an opportunity profile via eRecruiter, and they will end up in your eCoordinator's inbox, just like that of a volunteer profile. This gives your partner organizations the ability to recruit volunteers to their opportunities on your eRecruiter, pending your approval, of course.

**AddThis:** See what hot opportunities your volunteers are sharing through social networking sites. You can add an AddThis link to gather analytics from your eRecruiter. Speak to Samaritan customer support for more details.

**Activity:**

1. Ask trainees to go to the eRecruiter website on their computers. eRecruiter sites will vary for each Samaritan client.
2. Resolve any Internet access problems.

### 1.4.1.1 eRecruiter Demonstration

D
Demo

Your instructor will now take you through a demonstration of how to:

1. Search for service opportunities
2. Review search results
3. Review details on a chosen service opportunity
4. Sign up for an opportunity
5. Register as a volunteer; demonstrate each tab as part of registration

**Action:**
Demonstrate this by going to the eRecruiter and pretending to be a new volunteer.

Volunteers may need to be approved by designated staff in eCoordinator before they will be able to review their schedules and placements, or enter logbook entries after they serve. This is the difference between "referrals" and "placements."

1. Review Referrals
2. Check Schedule
3. Check My Profile

**Action:**
1. Log out
2. Click on the listed commands in order
3. Use your previously created volunteer User ID and Password when requested

### 1.4.1.2 eRecruiter Practice

**P**
**Practice**

Now it is your turn to practice being a volunteer! At this point in our training, you will find and register for a service opportunity. **Please remember your Volunteer User ID & Password** because you will need them later when we practice reviewing referrals and schedules. You may want to write your User ID & Password here:

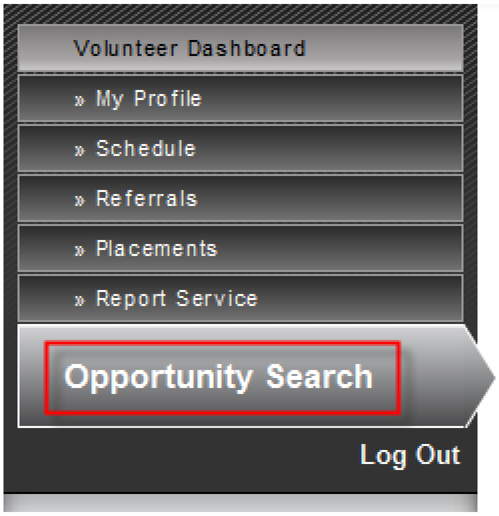
**My Practice *Volunteer* User ID & Password are:**

User ID: ____________________ Password: ____________________

Now follow these instructions:

**Practice Instructions:**

1. Go to your eRecruiter website
2. Click "Opportunity Search" and enter criteria
3. Review search results
4. Pick a service opportunity
5. Review details
6. Sign up
7. Complete all fields when registering


Volunteer Dashboard
» My Profile
» Schedule
» Referrals
» Placements
» Report Service
Opportunity Search
Log Out

### 1.4.1.3 eRecruiter Review

R
Review

A few things to remember about your eRecruiter:

1. Volunteers can find service opportunities using multiple criteria
2. Depending on how your system administrators have set up eRecruiter, volunteers may not be able to review placements, schedules or logbooks without being approved by you through eCoordinator

**Activity:** Ask participants to read this out loud.

**My Personal Review:**

1. Where is the public website located? (URL)

   ____________________________________

2. Can a volunteer review their schedule without having been approved by a coordinator?

   YES NO

3. Which of **your** service opportunities are you most excited about volunteers seeing when they go to the eRecruiter?

4. Is it possible to search for service opportunities on the eRecruiter using multiple criteria?

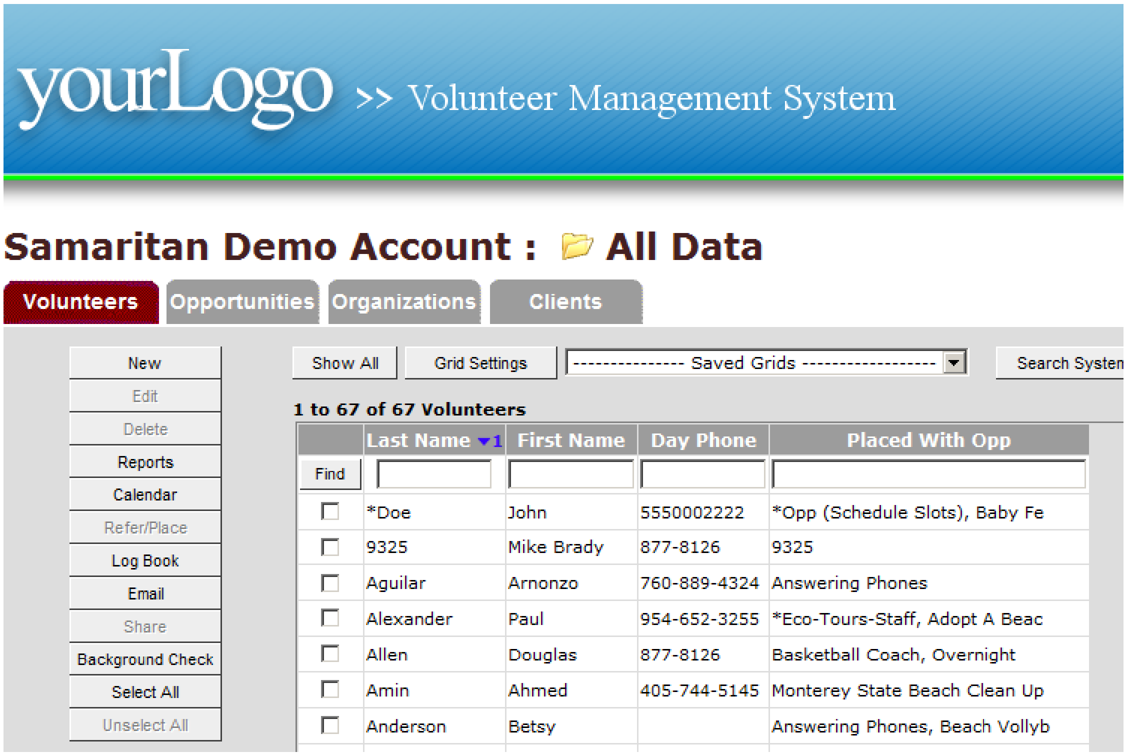
   YES NO

**Answer Key:**

1. Differs for each customer
2. Differs for each customer
3. Answers will vary
4. Yes

## 1.4.2 eCoordinator Introduction

The second part of the volunteer system is a secure web-based piece of software called eCoordinator, which helps you manage your volunteers, service opportunities, organizations and clients. The two products are fully interactive, so you can easily post new service opportunities online from inside eCoordinator, and receive new volunteers who are interested in serving in them.


yourLogo >> Volunteer Management System
Samaritan Demo Account : All Data
Volunteers
Opportunities
Organizations
Clients
New
Edit
Delete
Reports
Calendar
Refer/Place
Log Book
Email
Share
Background Check
Select All
Unselect All
Show All
Grid Settings
-------------- Saved Grids -----------------
Search Systen
Find

1 to 67 of 67 Volunteers

| | Last Name ▼1 | First Name | Day Phone | Placed With Opp |
|---|---|---|---|---|
| ☐ | *Doe | John | 5550002222 | *Opp (Schedule Slots), Baby Fe |
| ☐ | 9325 | Mike Brady | 877-8126 | 9325 |
| ☐ | Aguilar | Arnonzo | 760-889-4324 | Answering Phones |
| ☐ | Alexander | Paul | 954-652-3255 | *Eco-Tours-Staff, Adopt A Beac |
| ☐ | Allen | Douglas | 877-8126 | Basketball Coach, Overnight |
| ☐ | Amin | Ahmed | 405-744-5145 | Monterey State Beach Clean Up |
| ☐ | Anderson | Betsy | | Answering Phones, Beach Vollyb |

### Purpose of eCoordinator

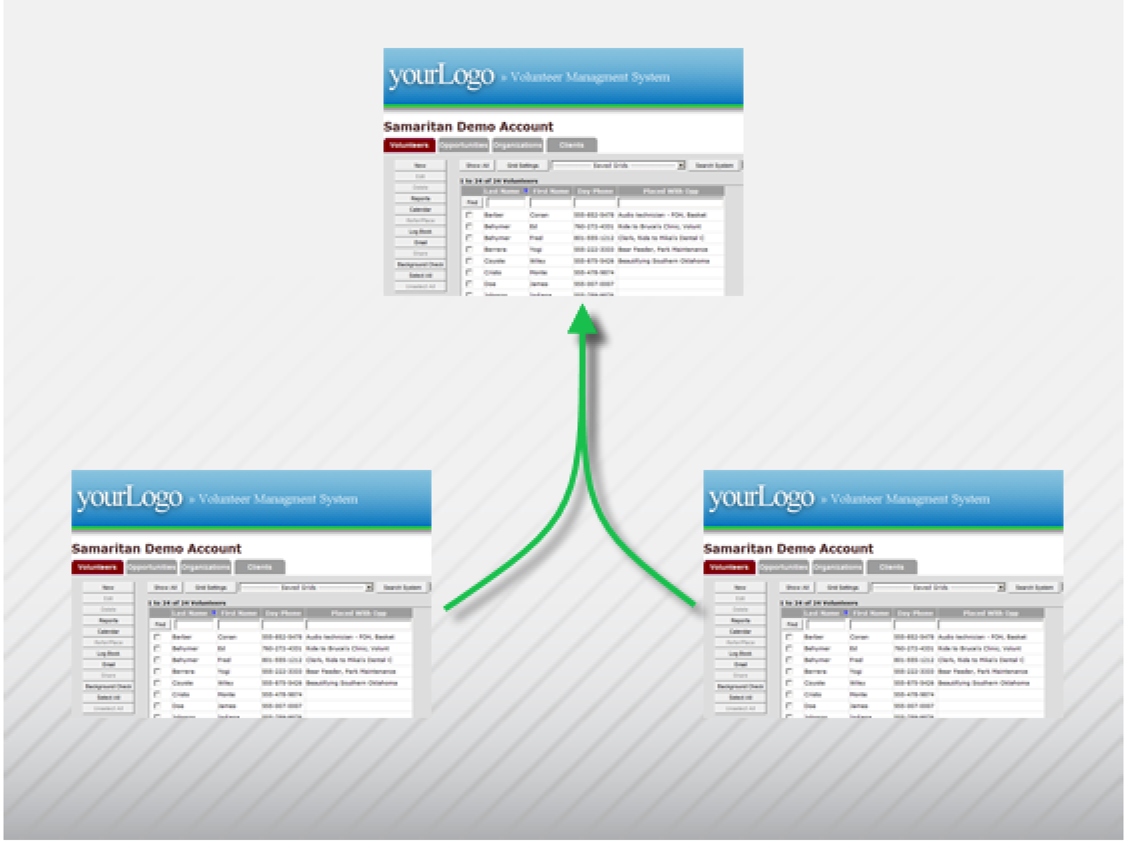
eCoordinator helps you review, process, schedule, track and report on volunteers. It also controls which opportunities are viewed on eRecruiter and receives new volunteers who register there.

**Networking Records:**

Finally, eCoordinator allows for the existence of networks, where volunteer data flows from one eCoordinator account to another, even forming hierarchies and tributaries.

**Folder Sharing:**

As illustrated below, eCoordinator accounts are networked together in a way that allows program administrators to automatically see all volunteer activity at the main level. This eliminates the need for reports to be sent to administrators on any data stored inside eCoordinator, including statistics. When you (or your volunteers) change anything in the database, it is automatically changed throughout the entire system.

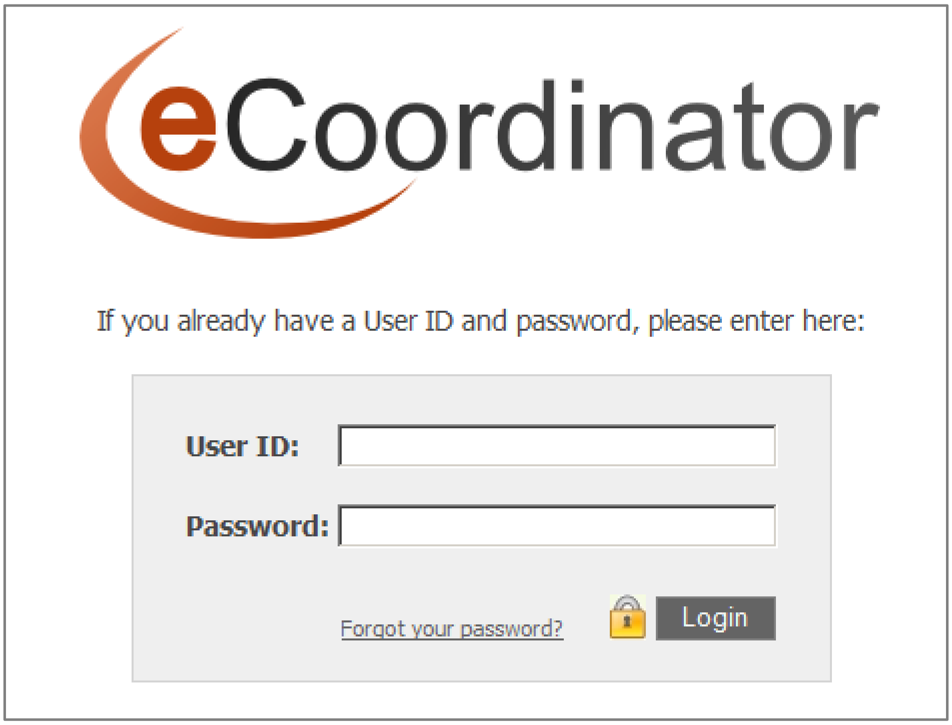

yourLogo » Volunteer Managment System
Samaritan Demo Account
Volunteers
Opportunities
Organizations
Clients
yourLogo » Volunteer Managment System
Samaritan Demo Account
Volunteers
Opportunities
Organizations
Clients
yourLogo » Volunteer Managment System
Samaritan Demo Account
Volunteers
Opportunities
Organizations
Clients

**Folder Access:**

Unlike Folder Sharing, where data visibility and access are facilitated by sharing the folder contents in one eCoordinator account to a folder in a separate eCoordinator account, Folder Access uses only a single eCoordinator account. In other words, instead of multiple eCoordinator users logging in to multiple accounts, with each account containing different data, Folder Access has those same multiple eCoordinator users logging in to a *single* account that contains all of the data. The beauty in this solution is that each login has access only to certain folders (defined in AMS), and can therefore access only the data that is pertinent to the individual, much like logging in to a separate eCoordinator account altogether.

## Accessing eCoordinator:

**Action:** Write trainee eCoordinator User IDs and passwords on blackboard/white board.



If you already have a User ID and password, please enter here:

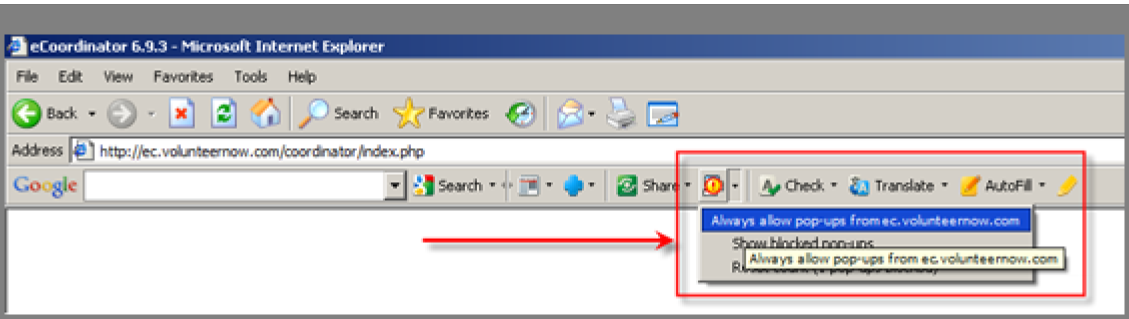
To access the system go to https://ec.samaritan.com/coordinator and type in the eCoordinator User ID and Password you have been assigned for this training. This is NOT the Volunteer User ID and Password that you created when registering on the eRecruiter. The first time you access eCoordinator you may need to disable pop-up blocking on your computer. If you have difficulties accessing the software, please talk to your instructor.

**Action:** Monitor trainees as they login, and resolve any access problems.

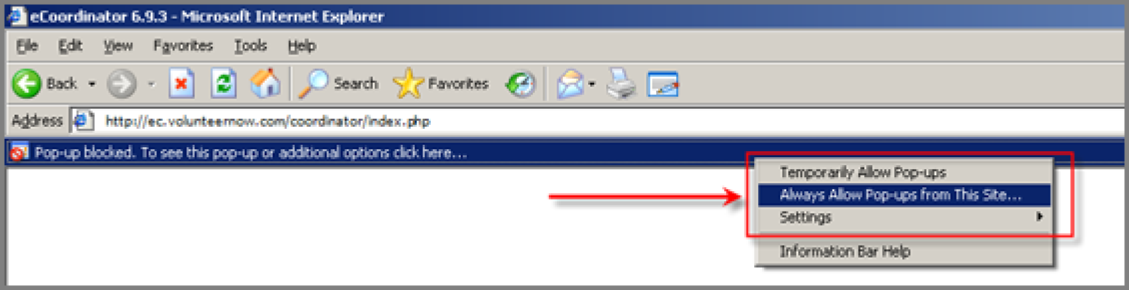
**Special Instructions: Resolving Access Problems**

The most common access problems and solutions:

1. Google, Yahoo or other pop-up blockers are enabled.
   Solution: Click the icons (usually resembling some sort of a burst, or exclamation mark) and enable pop-up.


eCoordinator 6.9.3 - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Search Favorites
Address http://ec.volunteernow.com/coordinator/index.php
Google Search Share Check Translate AutoFill
Always allow pop-ups from ec.volunteernow.com
Show blocked pop-ups
Always allow pop-ups from ec.volunteernow.com

2. Internet Explorer pop-up blocking is enabled.
   Solution: Disable it by clicking on the pop-up bar (yellowish in color) and selecting "Always Allow Pop-ups from This Site," as shown here:


eCoordinator 6.9.3 - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Search Favorites
Address http://ec.volunteernow.com/coordinator/index.php
Temporarily Allow Pop-ups
Always Allow Pop-ups from This Site...
Settings
Information Bar Help

Pop-up blocked. To see this pop-up or additional options click here...

3. Trainee is mistyping or does not have a valid User ID or password.
   Solution: Try reissuing a different User ID and typing it into the system yourself.

## 1.4.3 System Review

R
Review

**My Personal Review:**

Which of the following statements about the eCoordinator/eRecruiter volunteer management system are TRUE?

1. It has a public website.

   TRUE FALSE

2. It includes a secure, web-based software called eCoordinator.

   TRUE FALSE

3. You will see only your own data when you log into eCoordinator.

   TRUE FALSE

4. Anyone with administrative access may see your data at anytime without contacting you.

   TRUE FALSE

**Answer Key:**

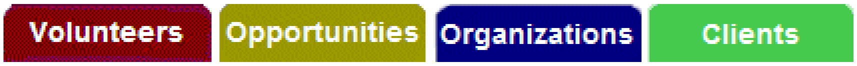
All of the above statements are TRUE.

## 1.4.4 eCoordinator Basic Navigation

There are three navigation components covered in this section:

1. Main Tabs
2. Menu Bar
3. Function Buttons

### 1.4.4.1 Main Tabs



There is one tab for each type of data you will work with most frequently: Volunteers, Opportunities, Organizations and Clients. There is a standard way of describing the logic between these tabs: “Who does What for Whom.”

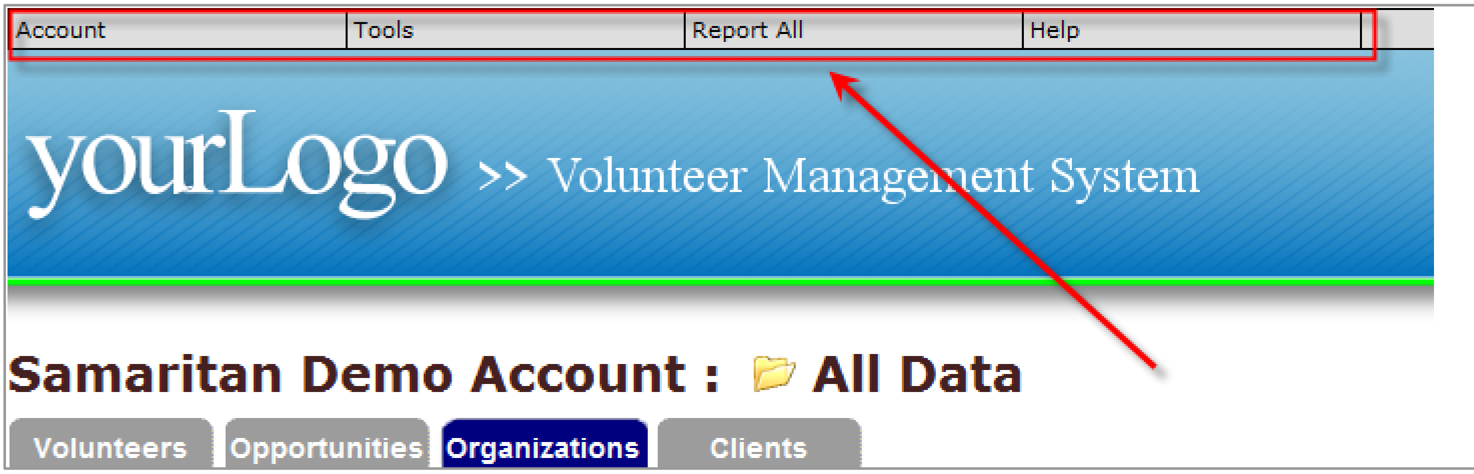
- Volunteers = Who
- Opportunities = does What
- Organizations = for Whom
- Clients = also for Whom, though not all eCoordinator users will designate individuals as service recipients.

**Action:** Move your mouse across each tab as you describe "Who does What for Whom."

Each of these has a unique definition with your organization:

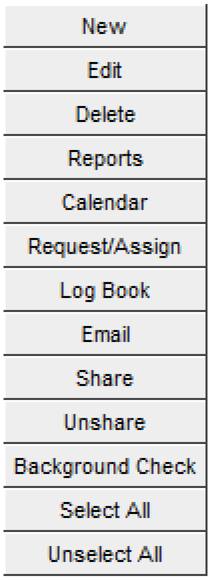
- **Volunteers:** Any volunteer who participates in a service opportunity.
- **Opportunities:** Any activity that engages volunteers (including trainings).
- **Organizations:** Organizations which own or operate service opportunities.
- **Clients:** Individual recipients of volunteer service. Not all eCoordinator users will use this tab.

### 1.4.4.2 Menu Bar


Account
Tools
Report All
Help
yourLogo >> Volunteer Management System
Samaritan Demo Account : All Data
Volunteers
Opportunities
Organizations
Clients

The menu bar gives you access to administrative options, build reports on ALL data in the system, and access the help file.

### 1.4.4.3 Function Buttons


New
Edit
Delete
Reports
Calendar
Request/Assign
Log Book
Email
Share
Unshare
Background Check
Select All
Unselect All

These allow you to choose the action you want to take *on selected records only*. In some cases you can only select a single record before taking one of the listed actions.

Later we will teach you how to search, sort, and build named grids and searches which will help you enter the data you need into the grids. For now it is important to know that you can select records and take action on them.

There are some buttons which open up entirely new sets of functions like “Scheduling,” "Email," and “Log Book.” Each of those has its own section of training material in this course.

You may also right-click on any of the main grids and be given the option of creating a new profile, or editing or deleting the profile that the mouse cursor is hovered over at the time of right-click.

## 1.4.5 Basic Navigation Demonstration

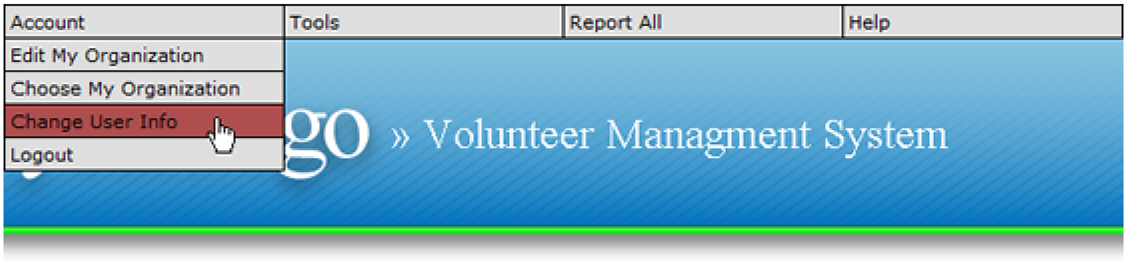
**D**

**Demo**

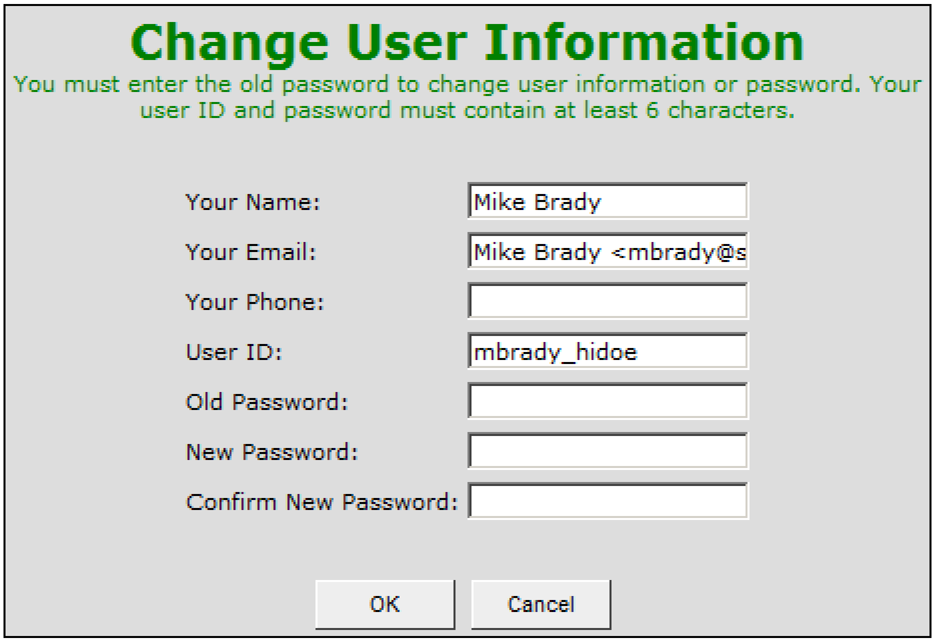
Your instructor will now take you on a basic tour of the software. You will then have the opportunity to explore these same features yourself. Here are some specific things you need to know:

### 1.4.5.1 Menu Bar Tour

**Account:**


Account
Tools
Report All
Help
Edit My Organization
Choose My Organization
Change User Info
Logout
go » Volunteer Managment System

In the “Account” menu, you use “Change User Info” to modify your eCoordinator User ID & Password.

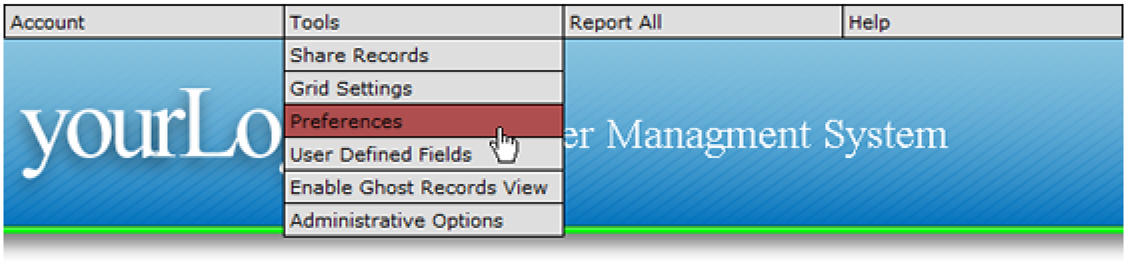


**Change User Information**

You must enter the old password to change user information or password. Your user ID and password must contain at least 6 characters.

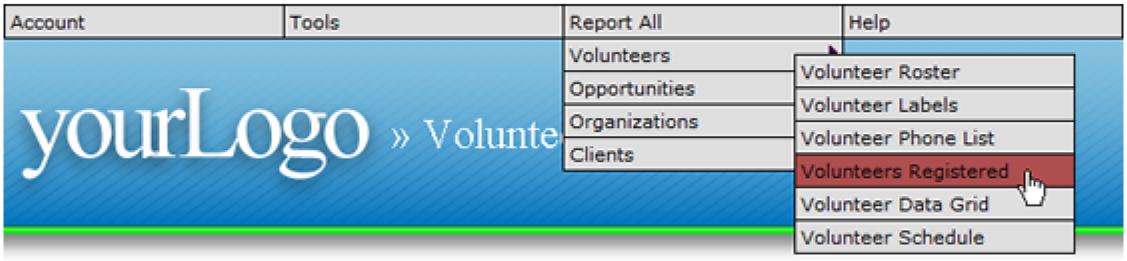
| | |
|---|---|
| Your Name: | Mike Brady |
| Your Email: | Mike Brady <mbrady@s |
| Your Phone: | |
| User ID: | mbrady_hidoe |
| Old Password: | |
| New Password: | |
| Confirm New Password: | |

**Tools:**


Account
Tools
Report All
Help
Share Records
Grid Settings
Preferences
User Defined Fields
Enable Ghost Records View
Administrative Options
yourLo
er Managment System

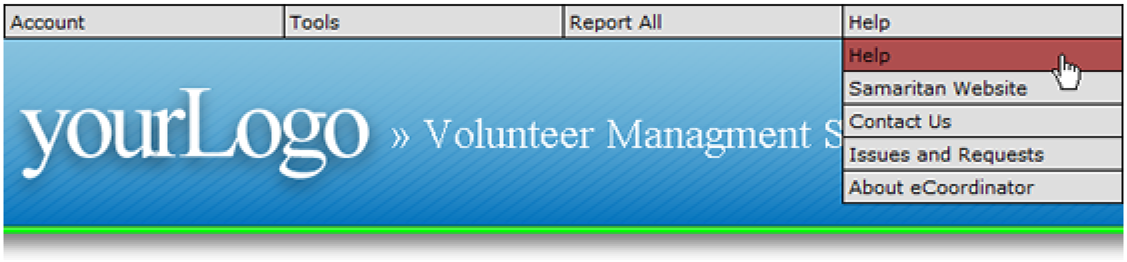
Items in the "Tools" menu will be not discussed in this training.

**Report All:**

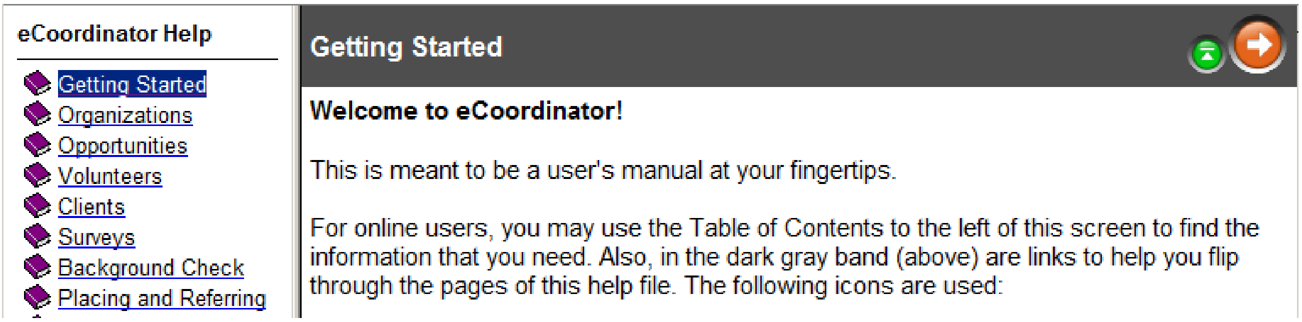

Account
Tools
Report All
Help
Volunteers
Opportunities
Organizations
Clients
Volunteer Roster
Volunteer Labels
Volunteer Phone List
Volunteers Registered
Volunteer Data Grid
Volunteer Schedule
yourLogo
» Volunte

In the “Report All” menu, there are two levels of pull down menus. The Report ALL allows you to report on all the data in the database rather than just specific records. To build reports on specific records use the function button called “Reports” on the left side of the screen after you find and select the desired records. Reports will also be explained in greater depth later in this training guide, but please be aware that they can be accessed from the menu bar.

**Help:**


Account
Tools
Report All
Help
Help
Samaritan Website
Contact Us
Issues and Requests
About eCoordinator
yourLogo » Volunteer Managment S

The “Help” menu contains access to the internal help files. The internal help files are structured by function.


eCoordinator Help
Getting Started
Organizations
Opportunities
Volunteers
Clients
Surveys
Background Check
Placing and Referring
Getting Started

**Welcome to eCoordinator!**

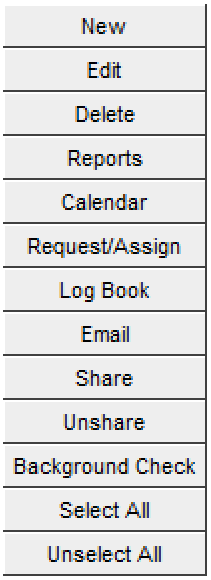
This is meant to be a user's manual at your fingertips.

For online users, you may use the Table of Contents to the left of this screen to find the information that you need. Also, in the dark gray band (above) are links to help you flip through the pages of this help file. The following icons are used:

### 1.4.5.2 Function Button Tour

Each feature will be discussed in greater detail later on in this manual. For now please note the following:

1. Before using a function, please select a record first.
2. Some buttons will not function unless a record is selected.


New
Edit
Delete
Reports
Calendar
Request/Assign
Log Book
Email
Share
Unshare
Background Check
Select All
Unselect All

**Action:** Point out each function button.

## 1.4.6 Basic Navigation Practice

**Practice Instructions:**

1. Change your password.
2. Learn more about how to edit a volunteer record by using the Help file.
3. Observe which function buttons become available to you when 0, 1 or 2+ profiles are selected.

**Action:** Monitor trainees and tutor as needed.

## 1.4.7 Basic Navigation Review

**My Personal Review:**

1. Please list all the resources you have for learning more about the volunteer management system. Include printed materials.

   a) ____________________________________

   b) ____________________________________

   c) ____________________________________

   d) ____________________________________

2. How often should you change your password the the system?

   ____________________________________

3. The best way to describe he relationship between volunteers, opportunities and organizations is:

   ____________________________________

**Answer Key:**

1. Answers to this question may include:
   a) Menu> Help> Help
   b) This training guide
   c) Samaritan Technologies support line: 888-904-6060 x 208
   d) Samaritan Technologies support email: support@samaritan.com
2. Depends on your internal policies.
3. WHO does WHAT for WHOM

## Part II

# Data Entry

# 2 Data Entry

I
Intro

The good news is that volunteers will do most of their own data entry from the eRecruiter. However, you still need to know how to enter new Organization, Opportunity, Volunteer and Client profiles whenever you need to.

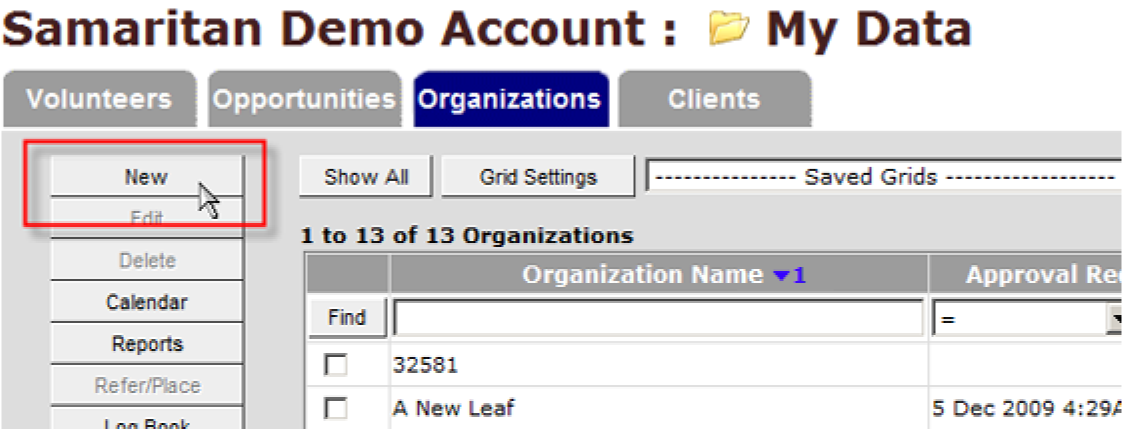
Here are some things to remember before you start doing *any* data entry:

1. Before creating an opportunity profile, you must first create the organization profile to which the opportunity belongs.
2. Multiple opportunities can belong to a single organization.
3. Training courses are another type of service opportunity.
4. Depending on how your program administrators have set up your system, selected data from opportunity profiles may be published on the eRecruiter. Be careful not to publish sensitive information.

## 2.1 Data Entry Demonstration: Organization

D
Demo

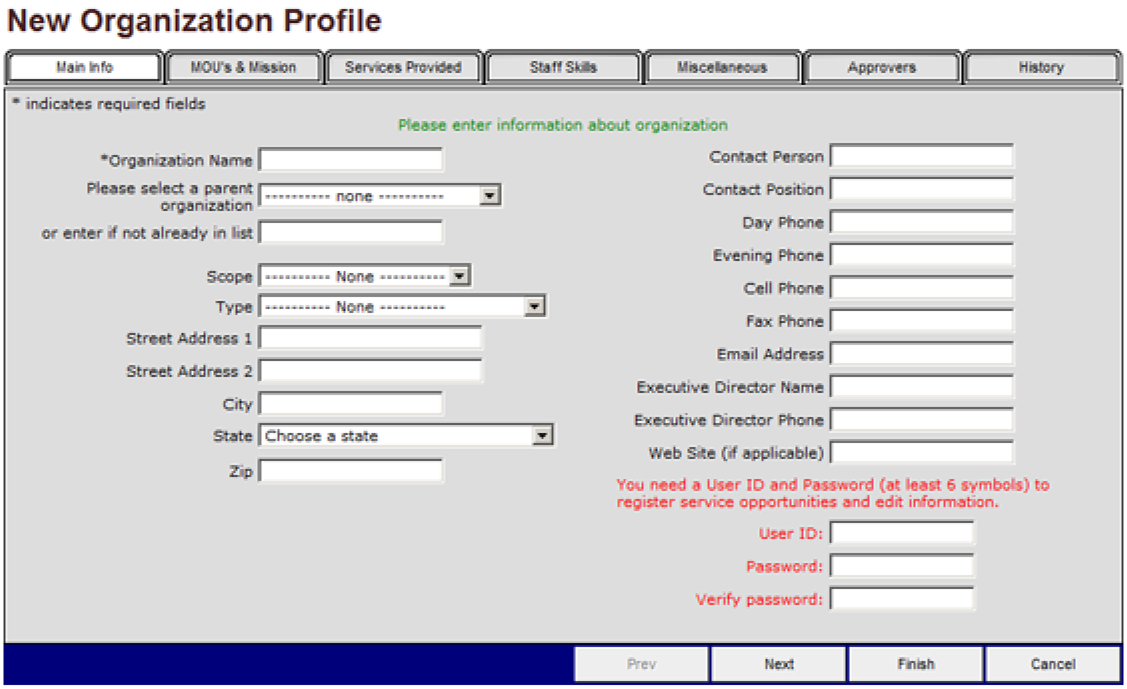
Since opportunity profiles are administered by organizations, the organization profiles must be created before opportunities profiles. To create a new organization profile, click on the "Organizations" tab, then click the "New" function button. Or, try right-clicking on the grid and selecting "New."


Samaritan Demo Account : My Data
Volunteers
Opportunities
Organizations
Clients
New
Edit
Delete
Calendar
Reports
Refer/Place
Log Book
Show All
Grid Settings
--------------- Saved Grids ------------------

1 to 13 of 13 Organizations

| | Organization Name ▼1 | Approval Re |
|---|---|---|
| Find | | = |
| ☐ | 32581 | |
| ☐ | A New Leaf | 5 Dec 2009 4:29A |

**Main Info:** You will see a screen that looks like this:



New Organization Profile

* indicates required fields

Please enter information about organization

*Organization Name
Please select a parent organization: ---------- none ----------
or enter if not already in list
Scope: ---------- None ----------
Type: ---------- None ----------
Street Address 1
Street Address 2
City
State: Choose a state
Zip

Contact Person
Contact Position
Day Phone
Evening Phone
Cell Phone
Fax Phone
Email Address
Executive Director Name
Executive Director Phone
Web Site (if applicable)

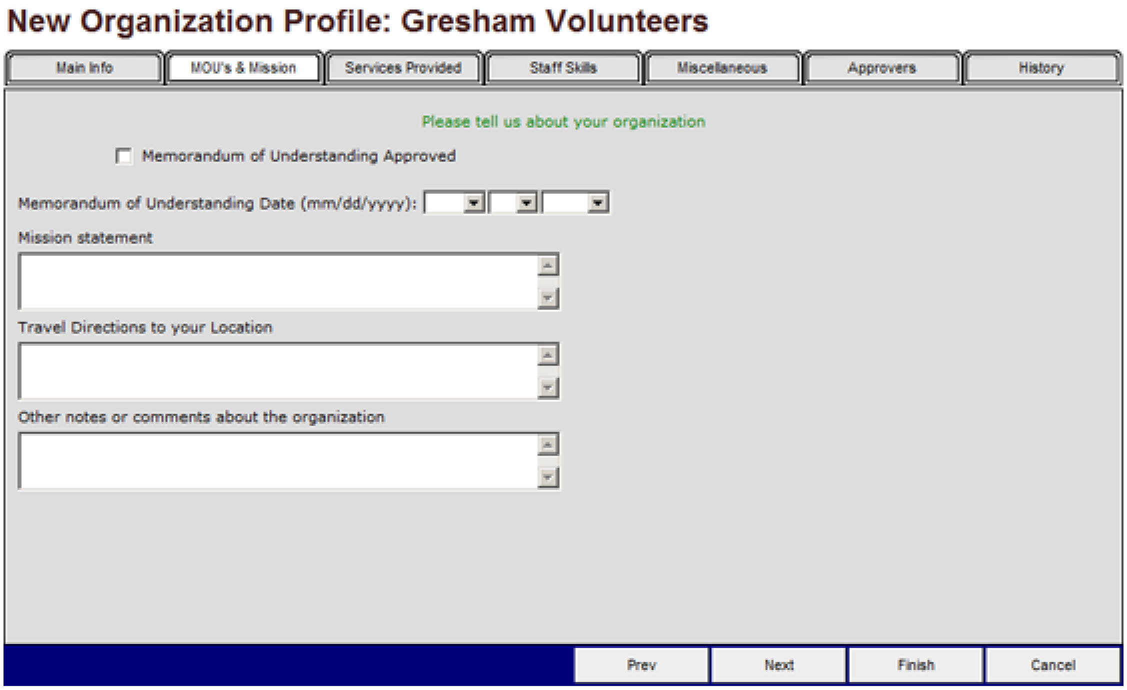
You need a User ID and Password (at least 6 symbols) to register service opportunities and edit information.

User ID:
Password:
Verify password:

Enter the basic information about your organization in the “Main Info” tab. Other tabs cannot be accessed until an Organization Name is entered. The parent organization drop-down field is customizable per your organization's needs. Please be as thorough as possible on this tab, as it may save much time later on.

You may either click the “Next” button at the bottom of the screen, or click the “MOU's & Mission” tab to move to the next set of data.

**MOU's & Mission:** The “MOU's & Mission” tab is for the mission statement, travel directions, and other free-form notes or comments (optional).



New Organization Profile: Gresham Volunteers

Please tell us about your organization

☐ Memorandum of Understanding Approved

Memorandum of Understanding Date (mm/dd/yyyy):

Mission statement

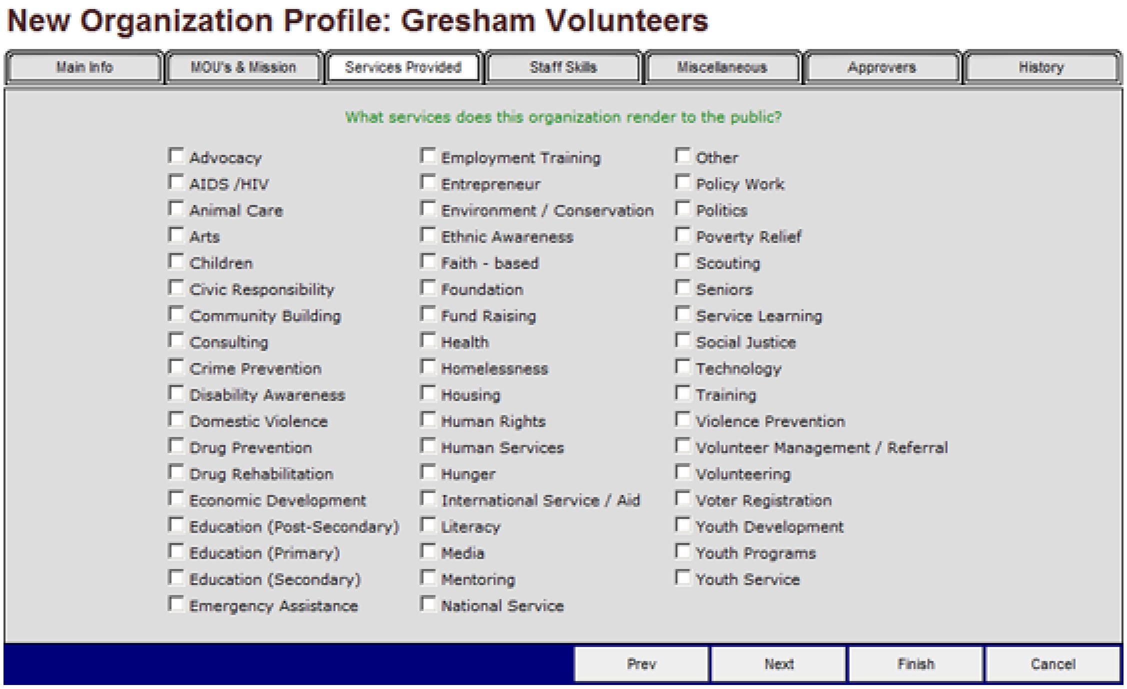
Travel Directions to your Location

Other notes or comments about the organization

Main Info
MOU's & Mission
Services Provided
Staff Skills
Miscellaneous
Approvers
History
Prev
Next
Finish
Cancel

Again, click the “Next” button or the “Services Provided” tab to advance to the next screen.

**Services Provided:** This tab allows you to define what kind of services the organization provides.

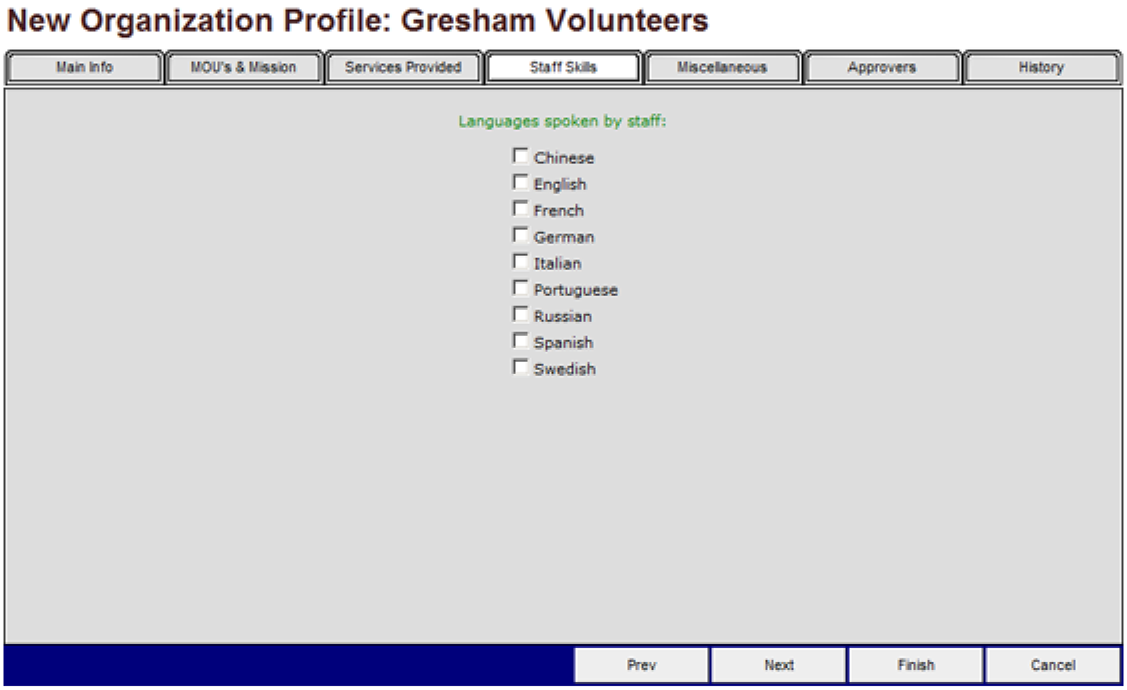


New Organization Profile: Gresham Volunteers

What services does this organization render to the public?

- ☐ Advocacy
- ☐ AIDS /HIV
- ☐ Animal Care
- ☐ Arts
- ☐ Children
- ☐ Civic Responsibility
- ☐ Community Building
- ☐ Consulting
- ☐ Crime Prevention
- ☐ Disability Awareness
- ☐ Domestic Violence
- ☐ Drug Prevention
- ☐ Drug Rehabilitation
- ☐ Economic Development
- ☐ Education (Post-Secondary)
- ☐ Education (Primary)
- ☐ Education (Secondary)
- ☐ Emergency Assistance
- ☐ Employment Training
- ☐ Entrepreneur
- ☐ Environment / Conservation
- ☐ Ethnic Awareness
- ☐ Faith - based
- ☐ Foundation
- ☐ Fund Raising
- ☐ Health
- ☐ Homelessness
- ☐ Housing
- ☐ Human Rights
- ☐ Human Services
- ☐ Hunger
- ☐ International Service / Aid
- ☐ Literacy
- ☐ Media
- ☐ Mentoring
- ☐ National Service
- ☐ Other
- ☐ Policy Work
- ☐ Politics
- ☐ Poverty Relief
- ☐ Scouting
- ☐ Seniors
- ☐ Service Learning
- ☐ Social Justice
- ☐ Technology
- ☐ Training
- ☐ Violence Prevention
- ☐ Volunteer Management / Referral
- ☐ Volunteering
- ☐ Voter Registration
- ☐ Youth Development
- ☐ Youth Programs
- ☐ Youth Service

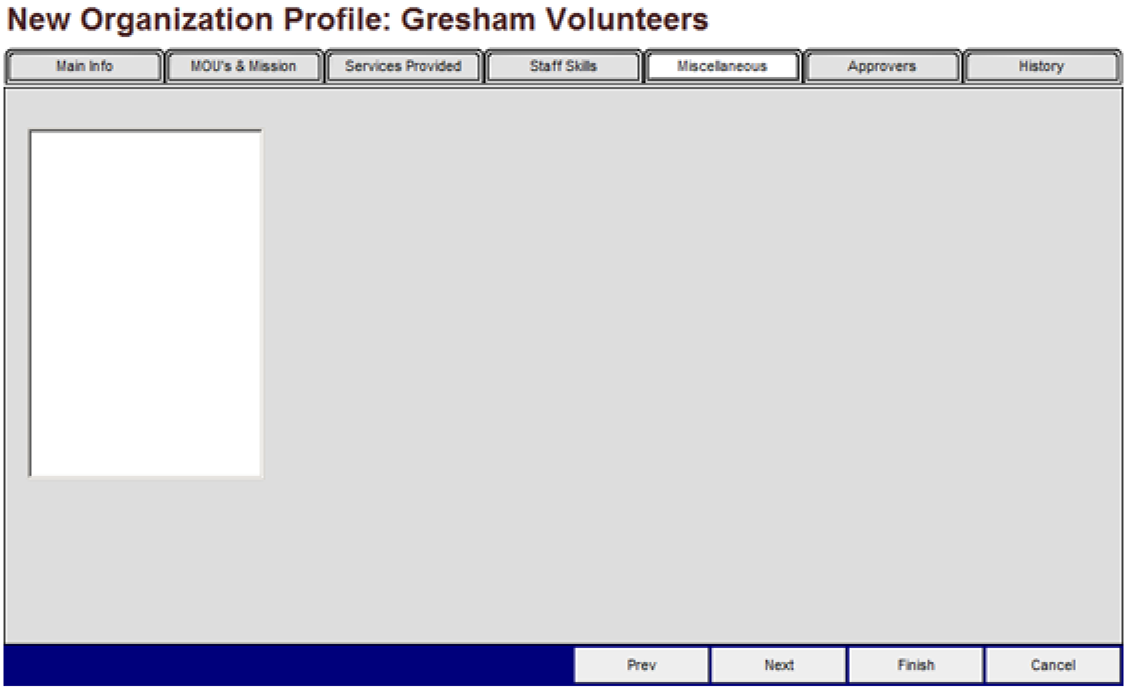
**Staff Skills:** Use this tab to define what skills are required by staff members working in any way with this organization. This screenshot displays languages spoken, however please remember that selections are customizable.


New Organization Profile: Gresham Volunteers
Main Info
MOU's & Mission
Services Provided
Staff Skills
Miscellaneous
Approvers
History
Prev
Next
Finish
Cancel

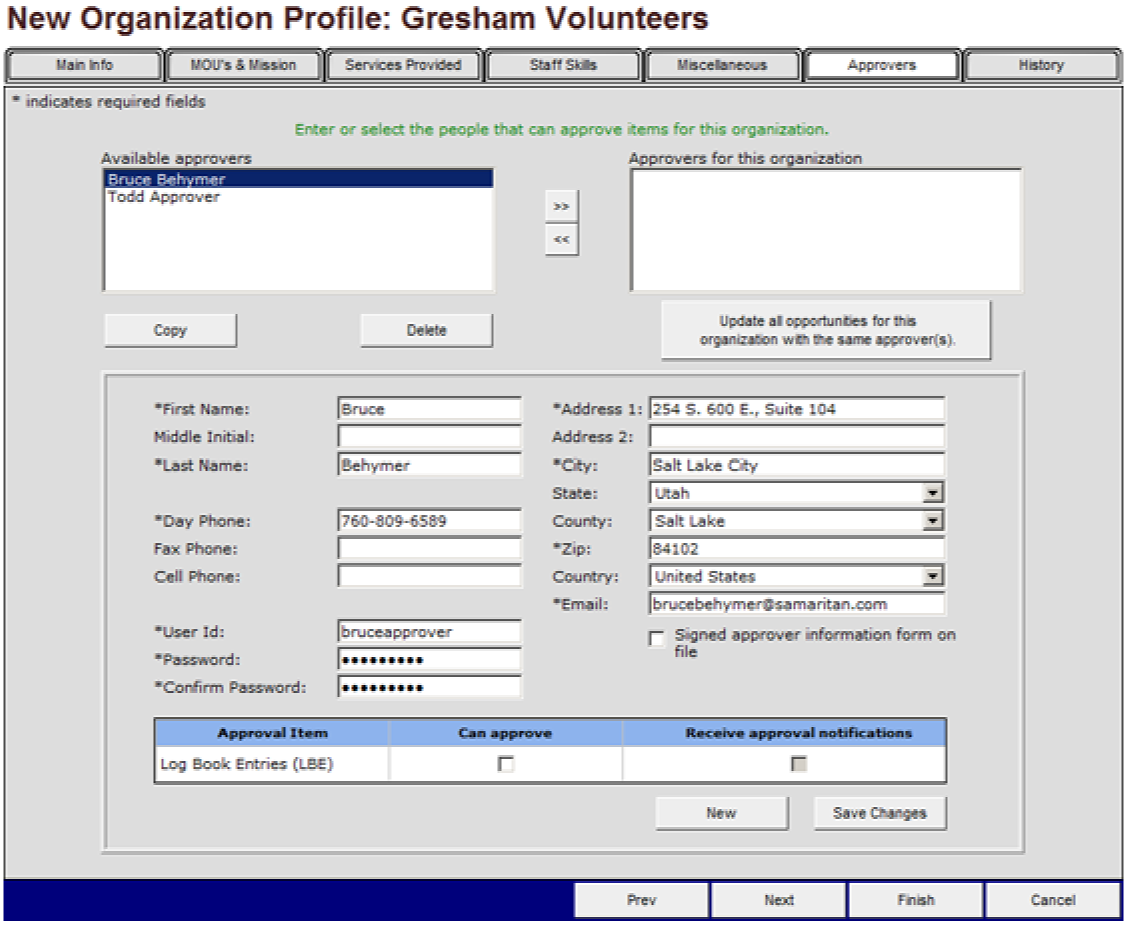
Languages spoken by staff:

☐ Chinese
☐ English
☐ French
☐ German
☐ Italian
☐ Portuguese
☐ Russian
☐ Spanish
☐ Swedish

**Miscellaneous:** This tab is also known as the User Defined tab, meaning that you, the user, define what fields appear here. Since this tab is generally administrated by program heads, not all eCoordinator users will have the ability to define their own fields. Training on this tab will be done on a case-by-case basis.


New Organization Profile: Gresham Volunteers
Main Info
MOU's & Mission
Services Provided
Staff Skills
Miscellaneous
Approvers
History
Prev
Next
Finish
Cancel

**Approvers:** Not all eCoordinators will use or have access to this tab. It is used to set up and administer "Approver" personnel who do NOT have eCoordinator access. Approvers have the ability to view and approve (or disapprove) log book entries without having access to eCoordinator.


New Organization Profile: Gresham Volunteers

* indicates required fields

Enter or select the people that can approve items for this organization.

Available approvers:
- Bruce Behymer
- Todd Approver

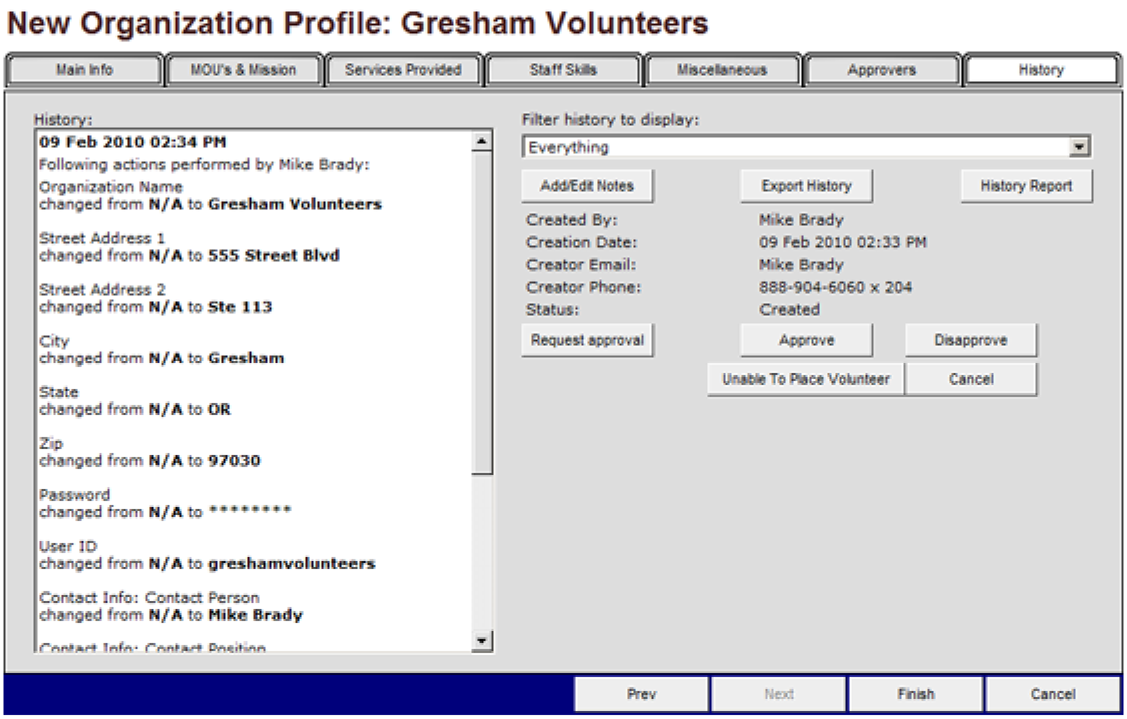
Approvers for this organization:

*First Name: Bruce
Middle Initial:
*Last Name: Behymer
*Day Phone: 760-809-6589
Fax Phone:
Cell Phone:
*User Id: bruceapprover
*Password: ●●●●●●●●●●
*Confirm Password: ●●●●●●●●●●
*Address 1: 254 S. 600 E., Suite 104
Address 2:
*City: Salt Lake City
State: Utah
County: Salt Lake
*Zip: 84102
Country: United States
*Email: brucebehymer@samaritan.com
☐ Signed approver information form on file

| Approval Item | Can approve | Receive approval notifications |
|---|---|---|
| Log Book Entries (LBE) | ☐ | ☐ |

Main Info
MOU's & Mission
Services Provided
Staff Skills
Miscellaneous
Approvers
History
>>
<<
Copy
Delete
Update all opportunities for this organization with the same approver(s).
New
Save Changes
Prev
Next
Finish
Cancel

**History:** The History tab keeps an audit trail of all changes to the profile. This includes placements and referrals, changes to any of the data fields in the profile, and you can even add your own notes. You can generate a history report, and approve profiles from this tab as well. All entries are time and date stamped, and included the name or login of the individual who made the change.


Main Info
MOU's & Mission
Services Provided
Staff Skills
Miscellaneous
Approvers
History
Add/Edit Notes
Export History
History Report
Request approval
Approve
Disapprove
Unable To Place Volunteer
Cancel
Prev
Next
Finish
Cancel

New Organization Profile: Gresham Volunteers

History:

**09 Feb 2010 02:34 PM**
Following actions performed by Mike Brady:
Organization Name
changed from **N/A** to **Gresham Volunteers**

Street Address 1
changed from **N/A** to **555 Street Blvd**

Street Address 2
changed from **N/A** to **Ste 113**

City
changed from **N/A** to **Gresham**

State
changed from **N/A** to **OR**

Zip
changed from **N/A** to **97030**

Password
changed from **N/A** to ************

User ID
changed from **N/A** to **greshamvolunteers**

Contact Info: Contact Person
changed from **N/A** to **Mike Brady**

Contact Info: Contact Position

Filter history to display: Everything

Created By: Mike Brady
Creation Date: 09 Feb 2010 02:33 PM
Creator Email: Mike Brady
Creator Phone: 888-904-6060 x 204
Status: Created

Please always make sure to click the "Finish" button when completing any profile.

## 2.2 Data Entry Practice: Organization

P
Practice

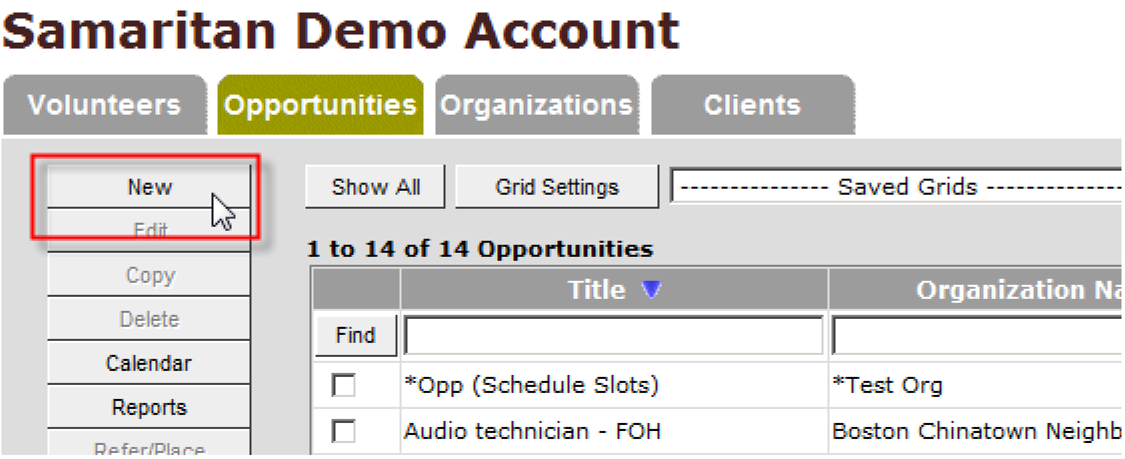
**Practice Instructions:**

1. Create a new Organization profile.
2. Use your own information for the contact person.
3. Fill out all applicable fields.

## 2.3 Data Entry Demonstration: Opportunity

D
Demo

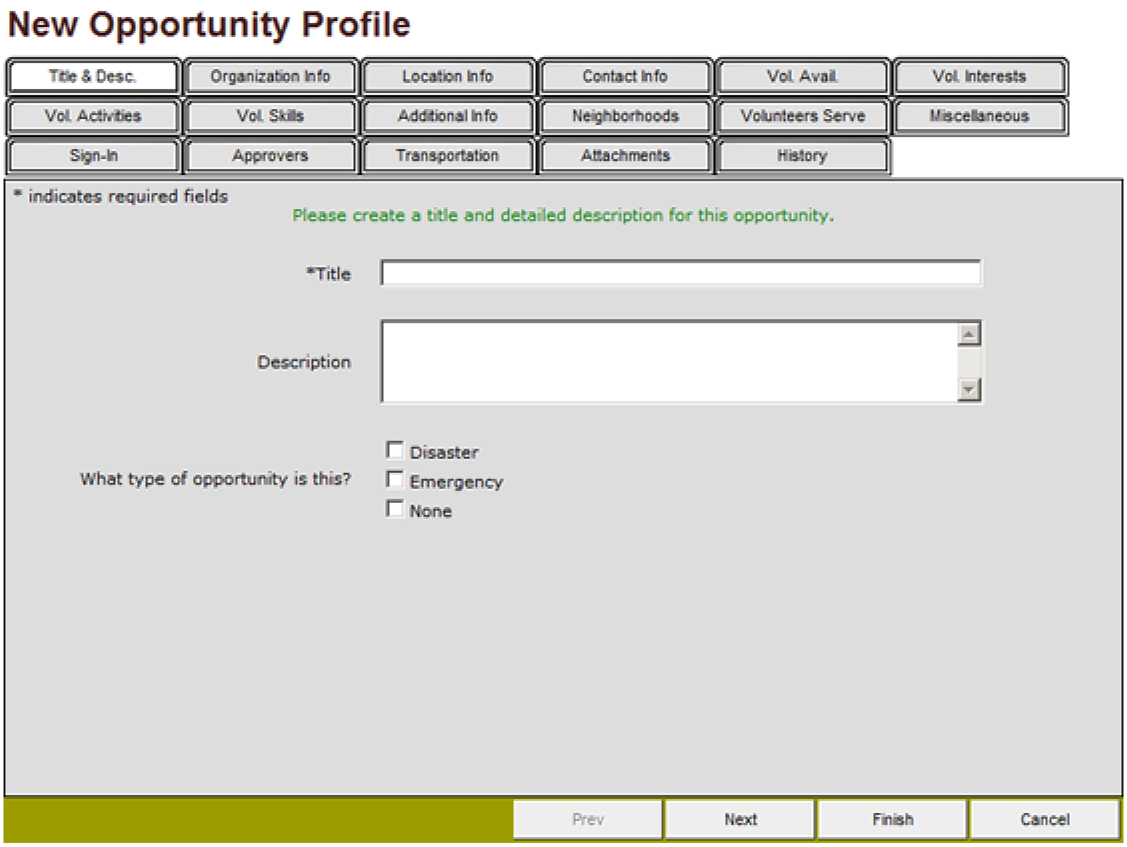
The next step is to create your Opportunity. Select the “Opportunity” tab and then click “New.” Or, try right-clicking on the grid and selecting "New."


Samaritan Demo Account
Volunteers
Opportunities
Organizations
Clients
New
Edit
Copy
Delete
Calendar
Reports
Refer/Place
Show All
Grid Settings
--------------- Saved Grids -------------
Find

1 to 14 of 14 Opportunities

| | Title ▼ | Organization Na |
|---|---|---|
| ☐ | *Opp (Schedule Slots) | *Test Org |
| ☐ | Audio technician - FOH | Boston Chinatown Neighb |

**Title & Desc.:** Enter the name of your opportunity and a brief description.


New Opportunity Profile
Title & Desc.
Organization Info
Location Info
Contact Info
Vol. Avail.
Vol. Interests
Vol. Activities
Vol. Skills
Additional Info
Neighborhoods
Volunteers Serve
Miscellaneous
Sign-In
Approvers
Transportation
Attachments
History
Prev
Next
Finish
Cancel

* indicates required fields

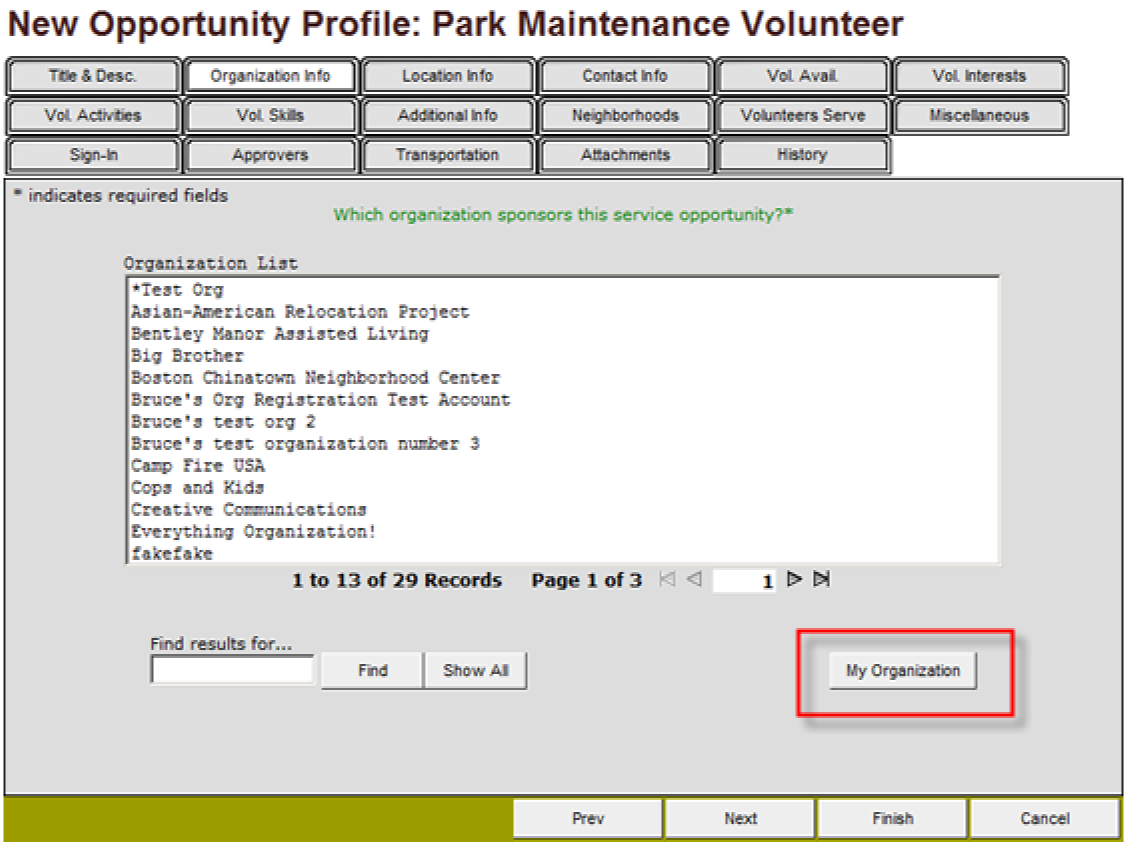
Please create a title and detailed description for this opportunity.

*Title

Description

What type of opportunity is this?
☐ Disaster
☐ Emergency
☐ None

**Organization Info:** This tab displays a list of organization profiles that have already been created in your eCoordinator. You may select "My Organization" to auto-select your specific home organization, or use the search box to limit the results displayed. Find and select your organization, then click "Next."



New Opportunity Profile: Park Maintenance Volunteer

Title & Desc.
Organization Info
Location Info
Contact Info
Vol. Avail.
Vol. Interests
Vol. Activities
Vol. Skills
Additional Info
Neighborhoods
Volunteers Serve
Miscellaneous
Sign-In
Approvers
Transportation
Attachments
History

* indicates required fields

Which organization sponsors this service opportunity?*

Organization List

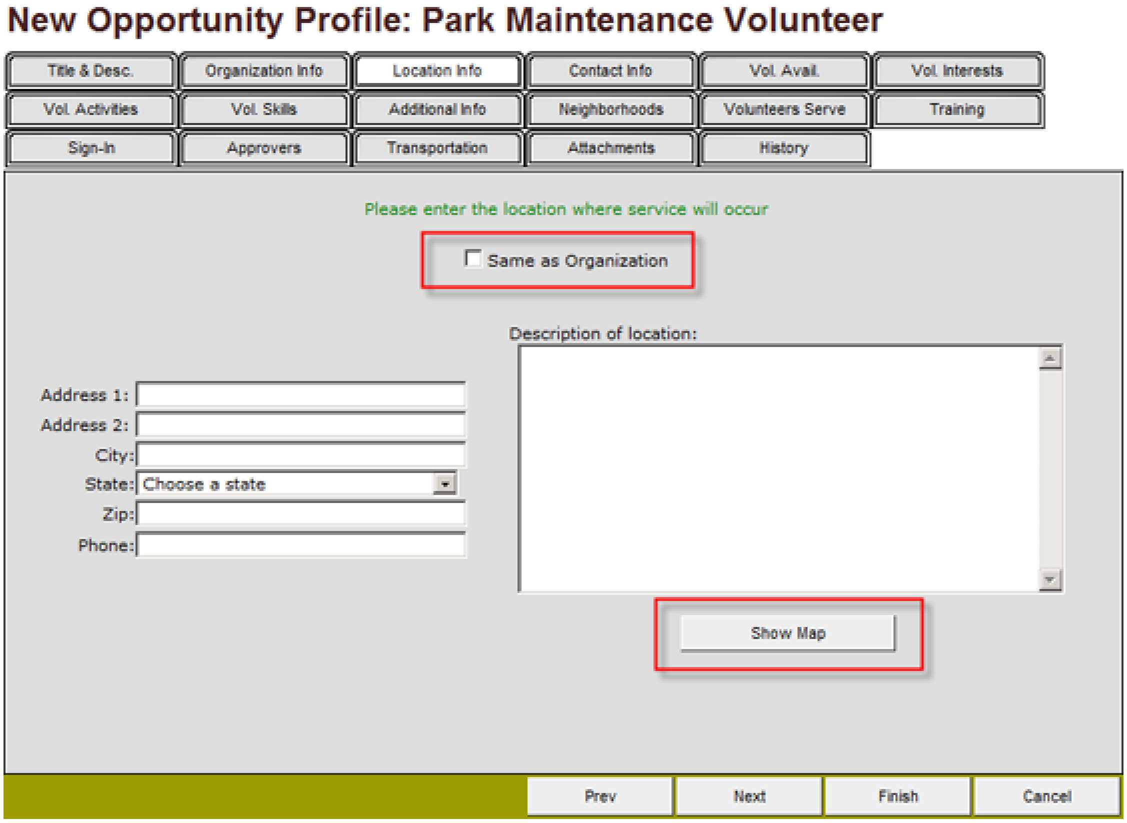
*Test Org
Asian-American Relocation Project
Bentley Manor Assisted Living
Big Brother
Boston Chinatown Neighborhood Center
Bruce's Org Registration Test Account
Bruce's test org 2
Bruce's test organization number 3
Camp Fire USA
Cops and Kids
Creative Communications
Everything Organization!
fakefake

1 to 13 of 29 Records Page 1 of 3 1

Find results for...

Find
Show All
My Organization
Prev
Next
Finish
Cancel

**Location Info:** Enter the physical address of the location *where the services will occur for this opportunity.* If this address is the same as your organization contact information, you may again click “Same as Organization” to auto-fill the information. There is also a free-form text field that allows you to enter a more detailed description of the location. If you do not know the location, click the “Show Map” button and a separate MapQuest window will open.



New Opportunity Profile: Park Maintenance Volunteer

Please enter the location where service will occur

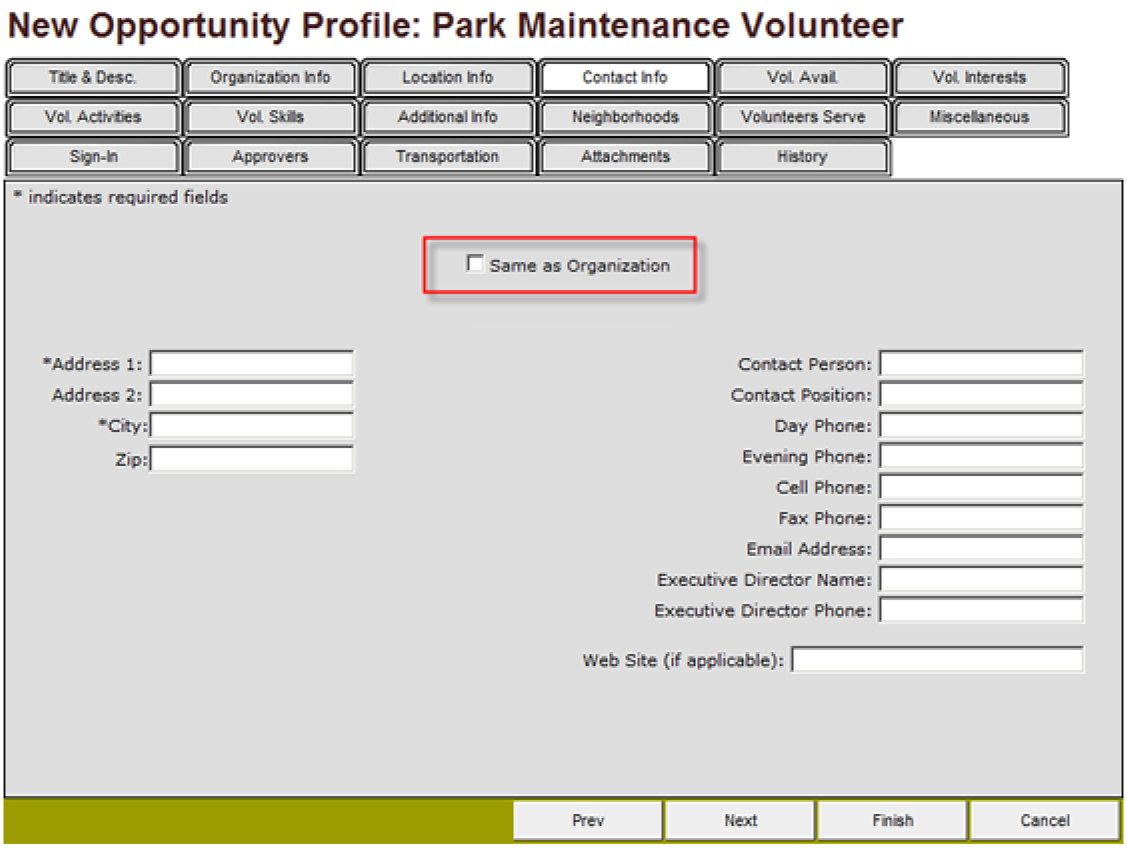
☐ Same as Organization

Address 1:
Address 2:
City:
State: Choose a state
Zip:
Phone:

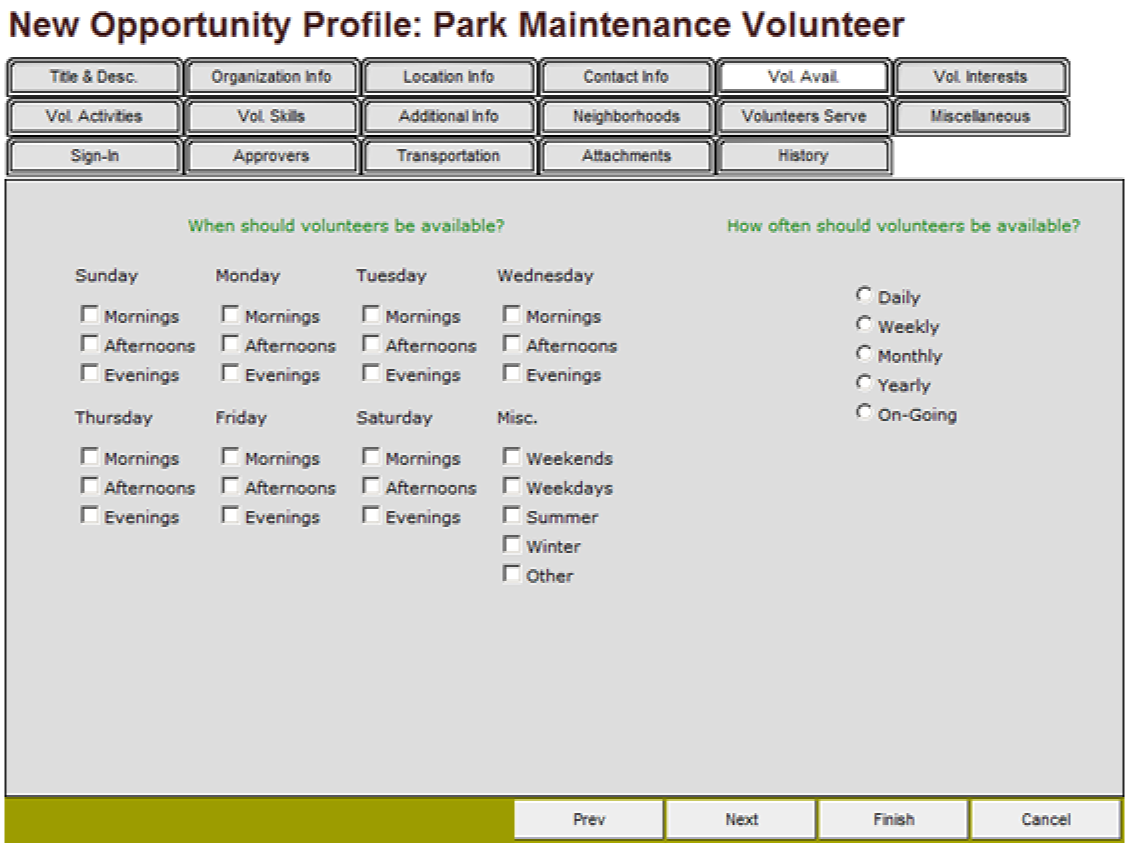
Description of location:

Title & Desc.
Organization Info
Location Info
Contact Info
Vol. Avail.
Vol. Interests
Vol. Activities
Vol. Skills
Additional Info
Neighborhoods
Volunteers Serve
Training
Sign-In
Approvers
Transportation
Attachments
History
Show Map
Prev
Next
Finish
Cancel

**Contact Info:** This tab displays contact information for the opportunity. If appropriate, you may click the “Same as Organization” button at the top of the screen to copy the contact information from your organization's "Main Info" tab to this screen. All of the fields filled out on that tab will auto-fill in the corresponding fields on the Opportunity Contacts tab. Click “Next” to continue.


New Opportunity Profile: Park Maintenance Volunteer
Title & Desc.
Organization Info
Location Info
Contact Info
Vol. Avail.
Vol. Interests
Vol. Activities
Vol. Skills
Additional Info
Neighborhoods
Volunteers Serve
Miscellaneous
Sign-In
Approvers
Transportation
Attachments
History
* indicates required fields
☐ Same as Organization
*Address 1:
Address 2:
*City:
Zip:
Contact Person:
Contact Position:
Day Phone:
Evening Phone:
Cell Phone:
Fax Phone:
Email Address:
Executive Director Name:
Executive Director Phone:
Web Site (if applicable):
Prev
Next
Finish
Cancel

**Vol. Avail:** Select the days and times that volunteers should be available to assist with this opportunity, and how frequently. Select all that apply.


Title & Desc.
Organization Info
Location Info
Contact Info
Vol. Avail.
Vol. Interests
Vol. Activities
Vol. Skills
Additional Info
Neighborhoods
Volunteers Serve
Miscellaneous
Sign-In
Approvers
Transportation
Attachments
History
Prev
Next
Finish
Cancel

New Opportunity Profile: Park Maintenance Volunteer

When should volunteers be available?

Sunday
- ☐ Mornings
- ☐ Afternoons
- ☐ Evenings

Monday
- ☐ Mornings
- ☐ Afternoons
- ☐ Evenings

Tuesday
- ☐ Mornings
- ☐ Afternoons
- ☐ Evenings

Wednesday
- ☐ Mornings
- ☐ Afternoons
- ☐ Evenings

Thursday
- ☐ Mornings
- ☐ Afternoons
- ☐ Evenings

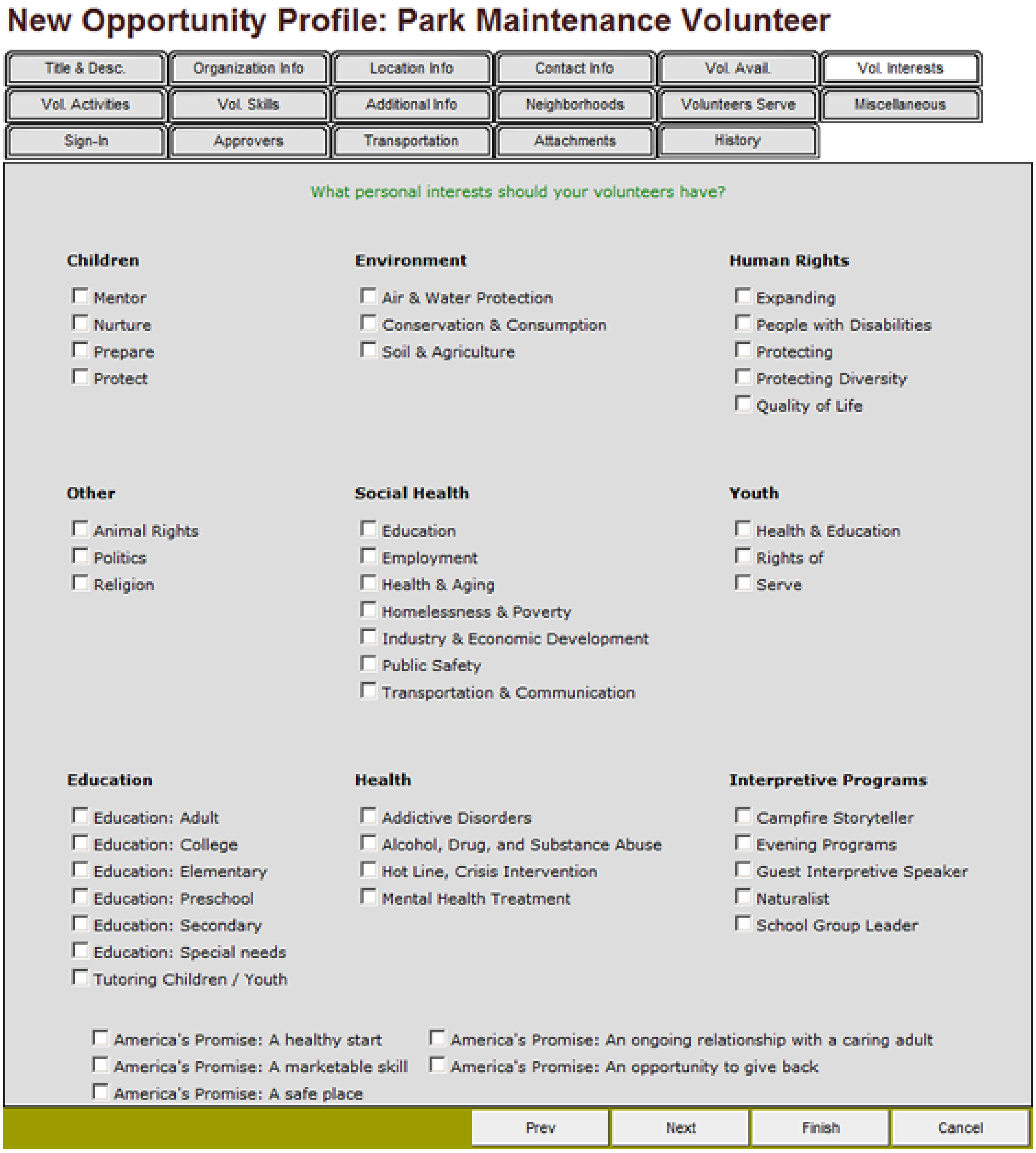
Friday
- ☐ Mornings
- ☐ Afternoons
- ☐ Evenings

Saturday
- ☐ Mornings
- ☐ Afternoons
- ☐ Evenings

Misc.
- ☐ Weekends
- ☐ Weekdays
- ☐ Summer
- ☐ Winter
- ☐ Other

How often should volunteers be available?
- ○ Daily
- ○ Weekly
- ○ Monthly
- ○ Yearly
- ○ On-Going

**Vol. Interests:** The “Vol. Interests” tab allows you to select the personal interests that your volunteers should have for the opportunity you are entering. Check as many boxes as you feel are appropriate for this opportunity.


Title & Desc.
Organization Info
Location Info
Contact Info
Vol. Avail.
Vol. Interests
Vol. Activities
Vol. Skills
Additional Info
Neighborhoods
Volunteers Serve
Miscellaneous
Sign-In
Approvers
Transportation
Attachments
History
Prev
Next
Finish
Cancel

New Opportunity Profile: Park Maintenance Volunteer

What personal interests should your volunteers have?

**Children**

☐ Mentor
☐ Nurture
☐ Prepare
☐ Protect

**Environment**

☐ Air & Water Protection
☐ Conservation & Consumption
☐ Soil & Agriculture

**Human Rights**

☐ Expanding
☐ People with Disabilities
☐ Protecting
☐ Protecting Diversity
☐ Quality of Life

**Other**

☐ Animal Rights
☐ Politics
☐ Religion

**Social Health**

☐ Education
☐ Employment
☐ Health & Aging
☐ Homelessness & Poverty
☐ Industry & Economic Development
☐ Public Safety
☐ Transportation & Communication

**Youth**

☐ Health & Education
☐ Rights of
☐ Serve

**Education**

☐ Education: Adult
☐ Education: College
☐ Education: Elementary
☐ Education: Preschool
☐ Education: Secondary
☐ Education: Special needs
☐ Tutoring Children / Youth

**Health**

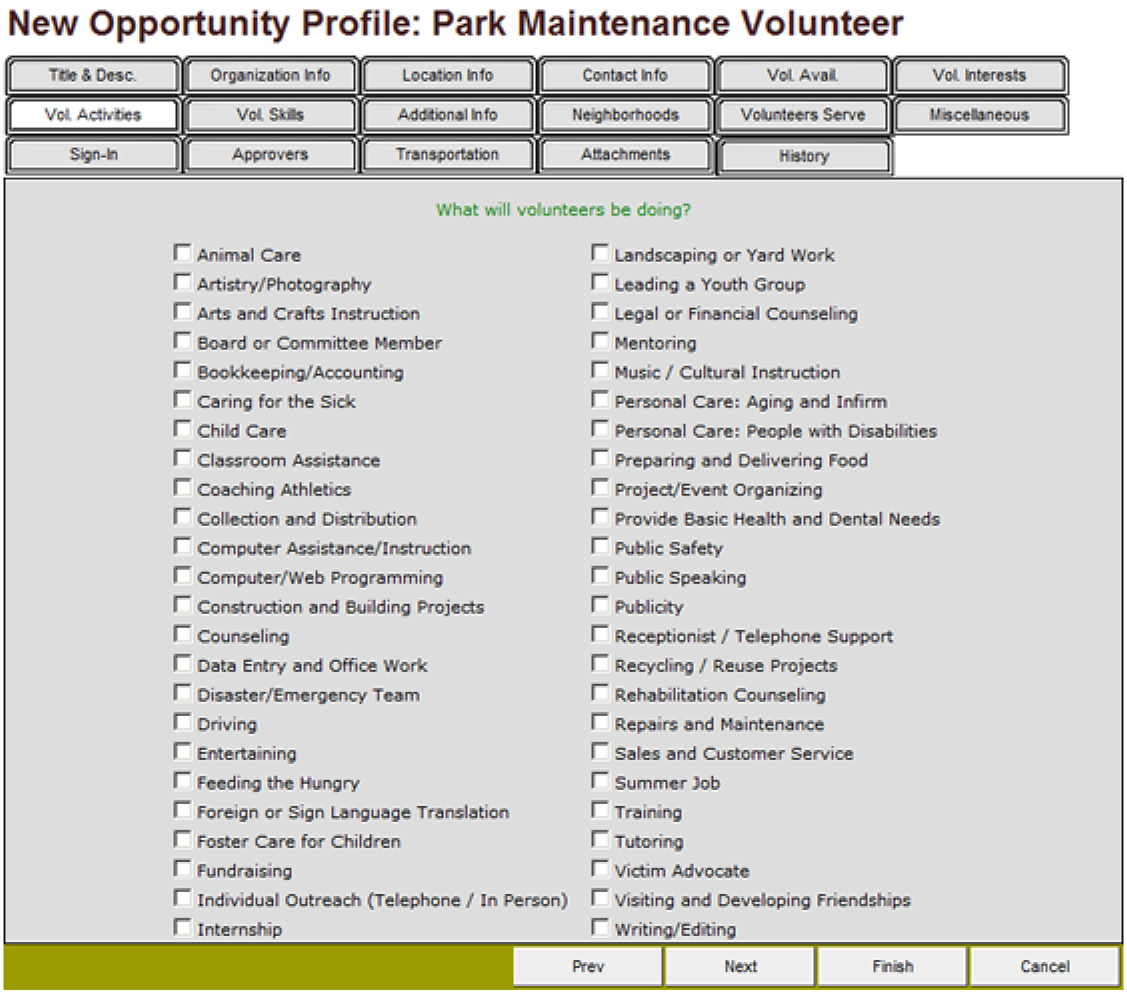
☐ Addictive Disorders
☐ Alcohol, Drug, and Substance Abuse
☐ Hot Line, Crisis Intervention
☐ Mental Health Treatment

**Interpretive Programs**

☐ Campfire Storyteller
☐ Evening Programs
☐ Guest Interpretive Speaker
☐ Naturalist
☐ School Group Leader

☐ America's Promise: A healthy start
☐ America's Promise: A marketable skill
☐ America's Promise: A safe place
☐ America's Promise: An ongoing relationship with a caring adult
☐ America's Promise: An opportunity to give back

**Vol. Activities:** What will volunteers be doing? What kind of activities? Selecting check boxes here may display the information on the eRecruiter, so that volunteers know what to expect.

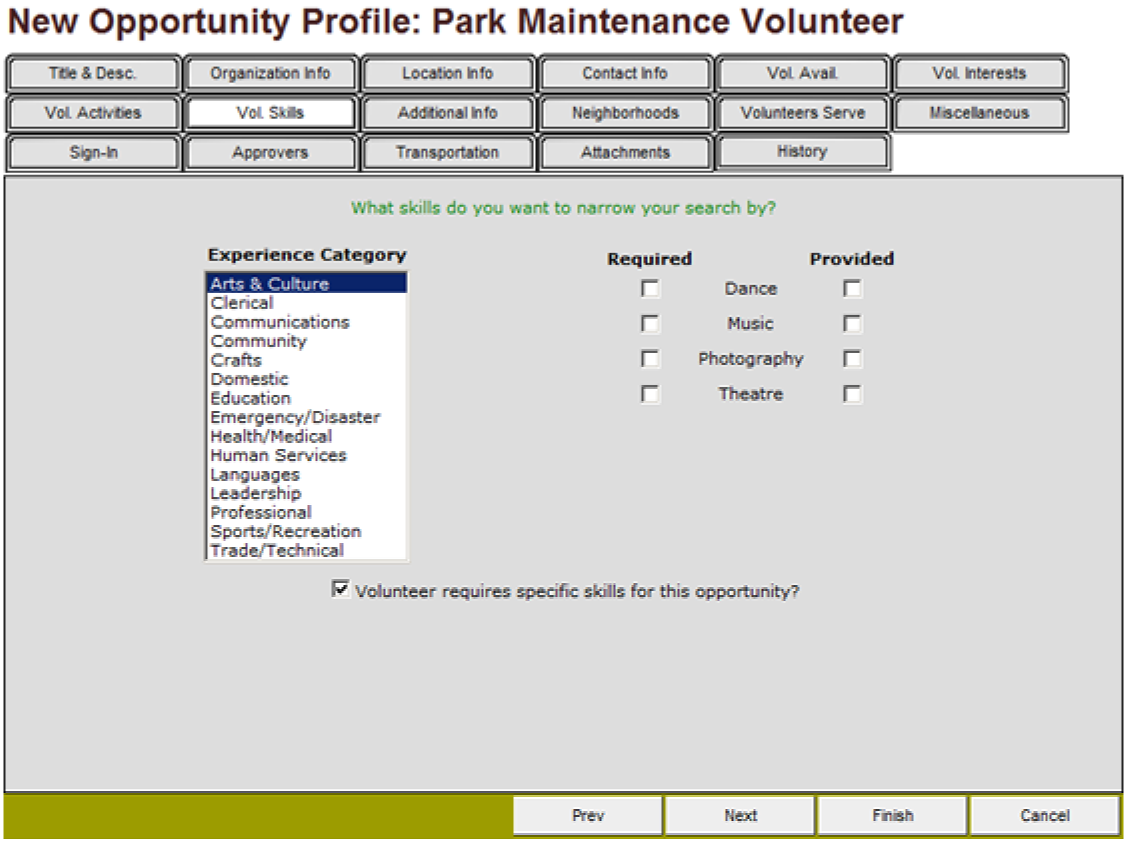

Title & Desc.
Organization Info
Location Info
Contact Info
Vol. Avail.
Vol. Interests
Vol. Activities
Vol. Skills
Additional Info
Neighborhoods
Volunteers Serve
Miscellaneous
Sign-In
Approvers
Transportation
Attachments
History
Prev
Next
Finish
Cancel

New Opportunity Profile: Park Maintenance Volunteer

What will volunteers be doing?

☐ Animal Care
☐ Artistry/Photography
☐ Arts and Crafts Instruction
☐ Board or Committee Member
☐ Bookkeeping/Accounting
☐ Caring for the Sick
☐ Child Care
☐ Classroom Assistance
☐ Coaching Athletics
☐ Collection and Distribution
☐ Computer Assistance/Instruction
☐ Computer/Web Programming
☐ Construction and Building Projects
☐ Counseling
☐ Data Entry and Office Work
☐ Disaster/Emergency Team
☐ Driving
☐ Entertaining
☐ Feeding the Hungry
☐ Foreign or Sign Language Translation
☐ Foster Care for Children
☐ Fundraising
☐ Individual Outreach (Telephone / In Person)
☐ Internship
☐ Landscaping or Yard Work
☐ Leading a Youth Group
☐ Legal or Financial Counseling
☐ Mentoring
☐ Music / Cultural Instruction
☐ Personal Care: Aging and Infirm
☐ Personal Care: People with Disabilities
☐ Preparing and Delivering Food
☐ Project/Event Organizing
☐ Provide Basic Health and Dental Needs
☐ Public Safety
☐ Public Speaking
☐ Publicity
☐ Receptionist / Telephone Support
☐ Recycling / Reuse Projects
☐ Rehabilitation Counseling
☐ Repairs and Maintenance
☐ Sales and Customer Service
☐ Summer Job
☐ Training
☐ Tutoring
☐ Victim Advocate
☐ Visiting and Developing Friendships
☐ Writing/Editing

**Vol. Skills:** This tab can be used to display on the eRecruiter either 1) what skills volunteers NEED to have in order to sign up for this opportunity, or 2) what skills volunteers will receive training in, as pertaining to this opportunity. Select the skill group on the left, then select either "Required" or "Provided" on the right.



New Opportunity Profile: Park Maintenance Volunteer

What skills do you want to narrow your search by?

**Experience Category**

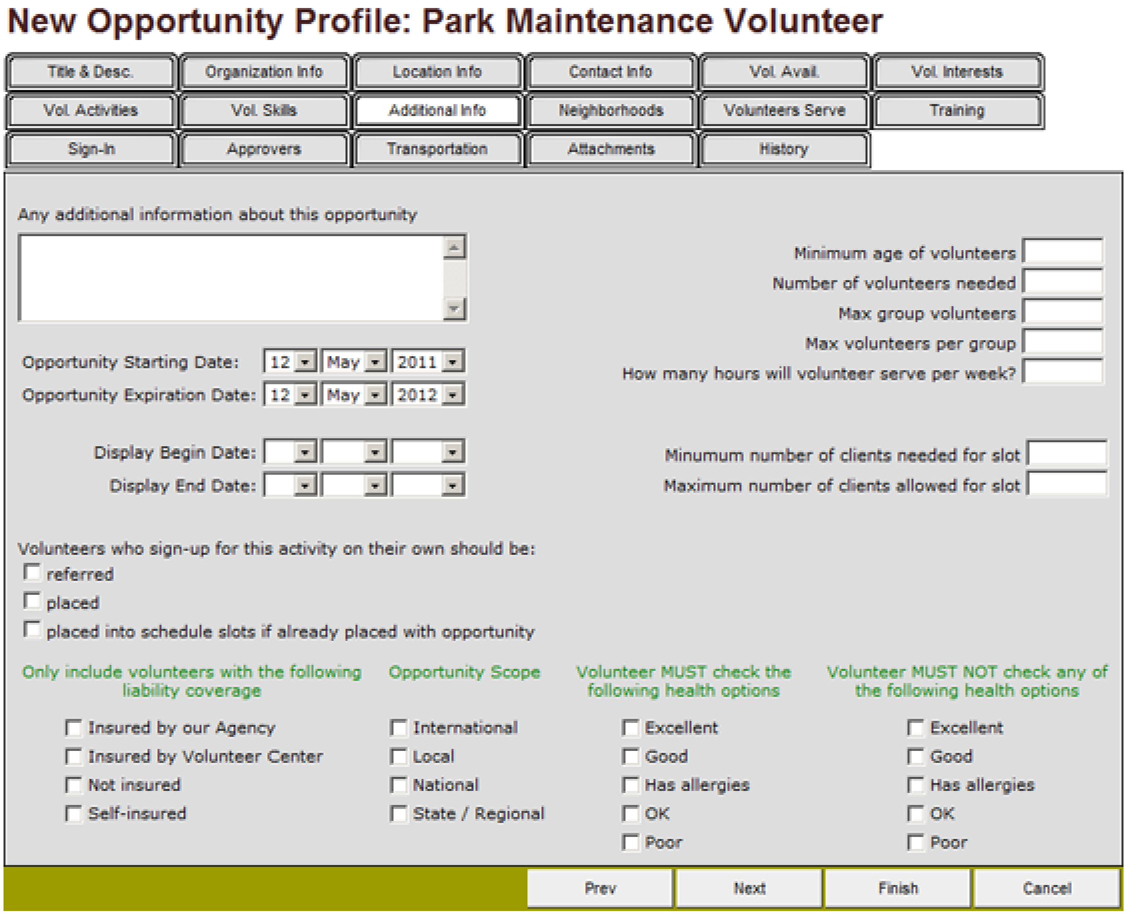
Arts & Culture
Clerical
Communications
Community
Crafts
Domestic
Education
Emergency/Disaster
Health/Medical
Human Services
Languages
Leadership
Professional
Sports/Recreation
Trade/Technical

| Required | | Provided |
|---|---|---|
| ☐ | Dance | ☐ |
| ☐ | Music | ☐ |
| ☐ | Photography | ☐ |
| ☐ | Theatre | ☐ |

☑ Volunteer requires specific skills for this opportunity?

Title & Desc.
Organization Info
Location Info
Contact Info
Vol. Avail.
Vol. Interests
Vol. Activities
Vol. Skills
Additional Info
Neighborhoods
Volunteers Serve
Miscellaneous
Sign-In
Approvers
Transportation
Attachments
History
Prev
Next
Finish
Cancel

**Additional Info:** This screen allows for a free-form additional information entry, as well as the minimum age of volunteers, number of volunteers needed, and the minimum number of hours per week to be served by volunteers. It also allows you to enter the start and end date that the opportunity will **display** on the eRecruiter. It also has fields used in Samaritan's Transportation System, which will be explained only if your organization has leased that system. Also, designate whether or not this opportunity accepts direct placements, or if volunteers must first be referred and reviewed before being placed.


Title & Desc.
Organization Info
Location Info
Contact Info
Vol. Avail.
Vol. Interests
Vol. Activities
Vol. Skills
Additional Info
Neighborhoods
Volunteers Serve
Training
Sign-In
Approvers
Transportation
Attachments
History
Prev
Next
Finish
Cancel

New Opportunity Profile: Park Maintenance Volunteer

Any additional information about this opportunity

Opportunity Starting Date: 12 May 2011

Opportunity Expiration Date: 12 May 2012

Display Begin Date:

Display End Date:

Minimum age of volunteers

Number of volunteers needed

Max group volunteers

Max volunteers per group

How many hours will volunteer serve per week?

Minumum number of clients needed for slot

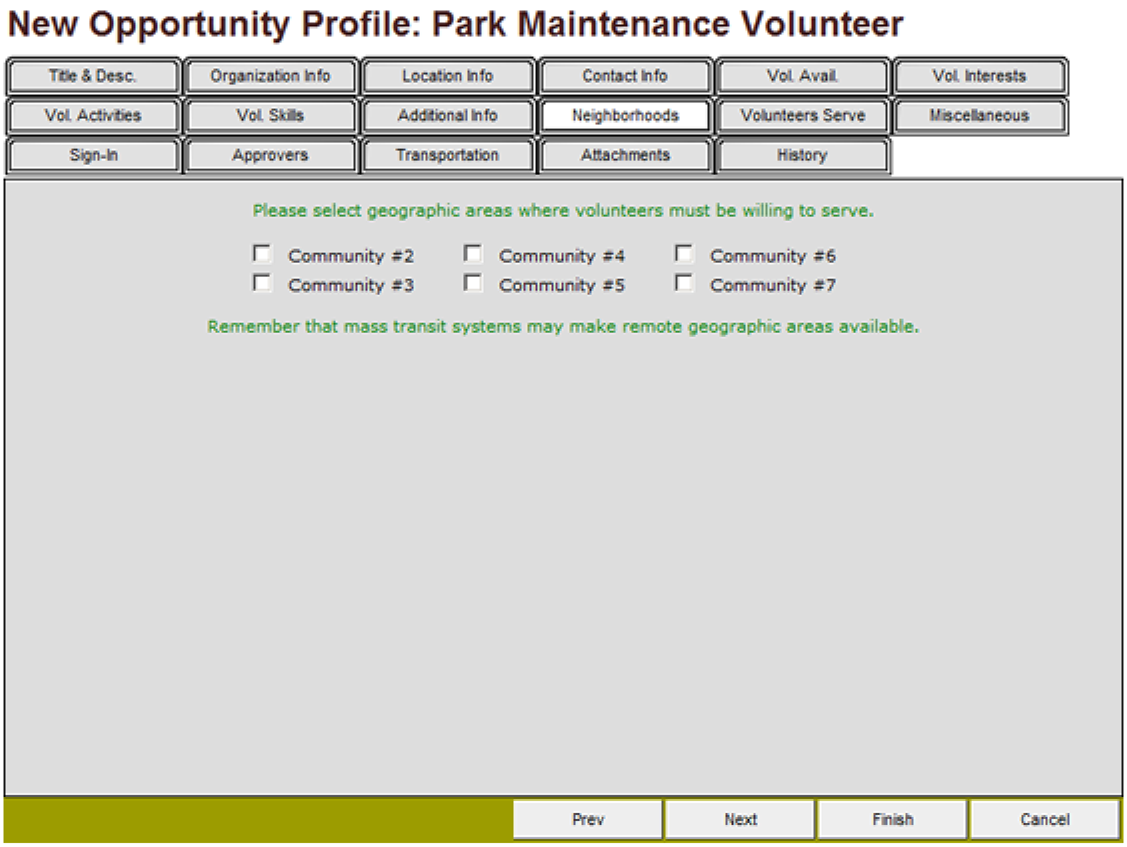
Maximum number of clients allowed for slot

Volunteers who sign-up for this activity on their own should be:

☐ referred
☐ placed
☐ placed into schedule slots if already placed with opportunity

| Only include volunteers with the following liability coverage | Opportunity Scope | Volunteer MUST check the following health options | Volunteer MUST NOT check any of the following health options |
|---|---|---|---|
| ☐ Insured by our Agency | ☐ International | ☐ Excellent | ☐ Excellent |
| ☐ Insured by Volunteer Center | ☐ Local | ☐ Good | ☐ Good |
| ☐ Not insured | ☐ National | ☐ Has allergies | ☐ Has allergies |
| ☐ Self-insured | ☐ State / Regional | ☐ OK | ☐ OK |
| | | ☐ Poor | ☐ Poor |

**Neighborhoods:** Select the geographical are, location or neighborhood where volunteers will work when serving in this opportunity.


New Opportunity Profile: Park Maintenance Volunteer

Title & Desc.
Organization Info
Location Info
Contact Info
Vol. Avail.
Vol. Interests
Vol. Activities
Vol. Skills
Additional Info
Neighborhoods
Volunteers Serve
Miscellaneous
Sign-In
Approvers
Transportation
Attachments
History

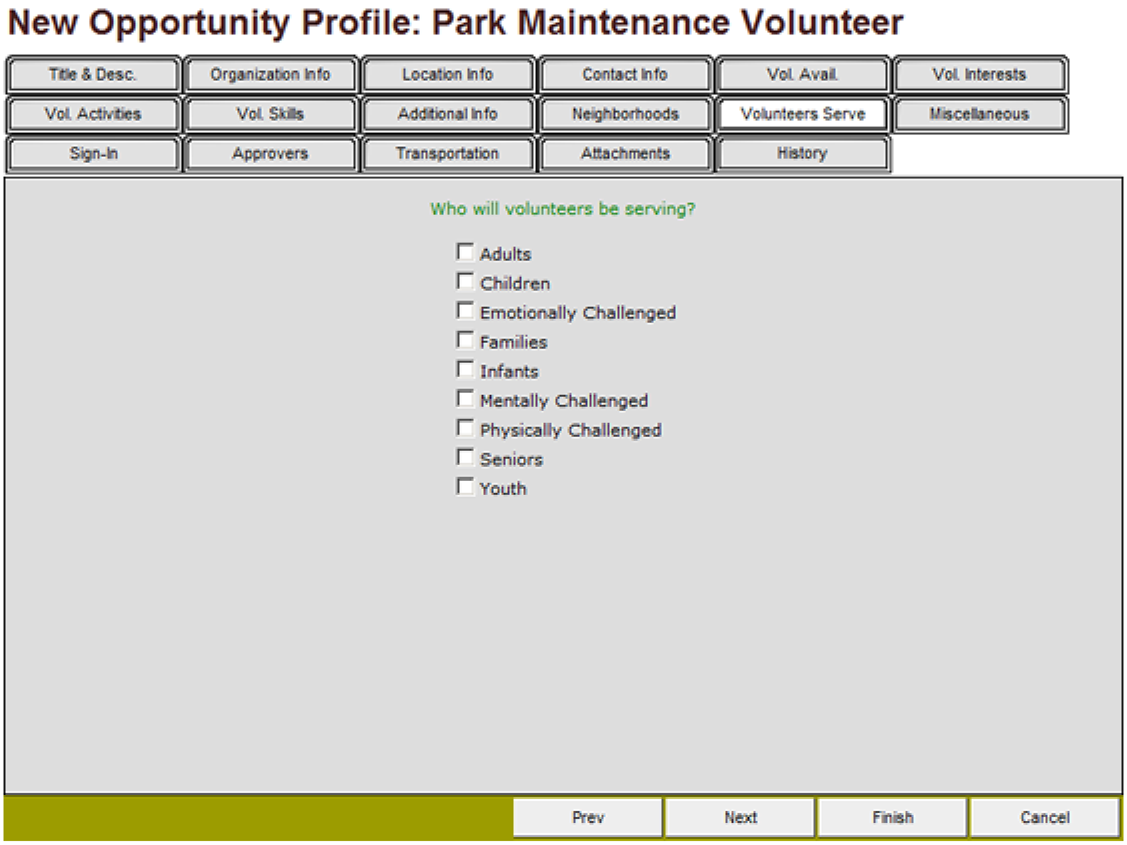
Please select geographic areas where volunteers must be willing to serve.

☐ Community #2
☐ Community #3
☐ Community #4
☐ Community #5
☐ Community #6
☐ Community #7

Remember that mass transit systems may make remote geographic areas available.

Prev
Next
Finish
Cancel

**Volunteers Serve:** Define the target population of this opportunity: who is benefiting from this service? Who is being served?



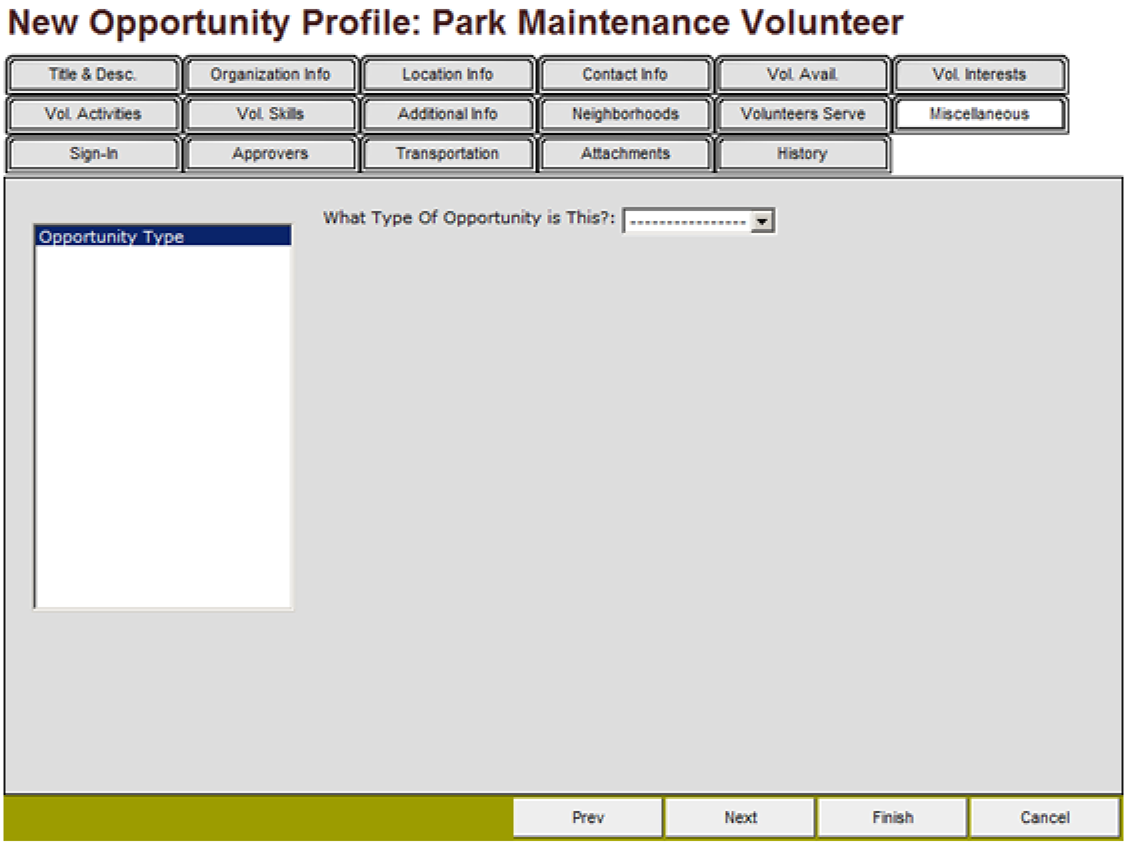
New Opportunity Profile: Park Maintenance Volunteer

Who will volunteers be serving?

☐ Adults
☐ Children
☐ Emotionally Challenged
☐ Families
☐ Infants
☐ Mentally Challenged
☐ Physically Challenged
☐ Seniors
☐ Youth

Title & Desc.
Organization Info
Location Info
Contact Info
Vol. Avail.
Vol. Interests
Vol. Activities
Vol. Skills
Additional Info
Neighborhoods
Volunteers Serve
Miscellaneous
Sign-In
Approvers
Transportation
Attachments
History
Prev
Next
Finish
Cancel

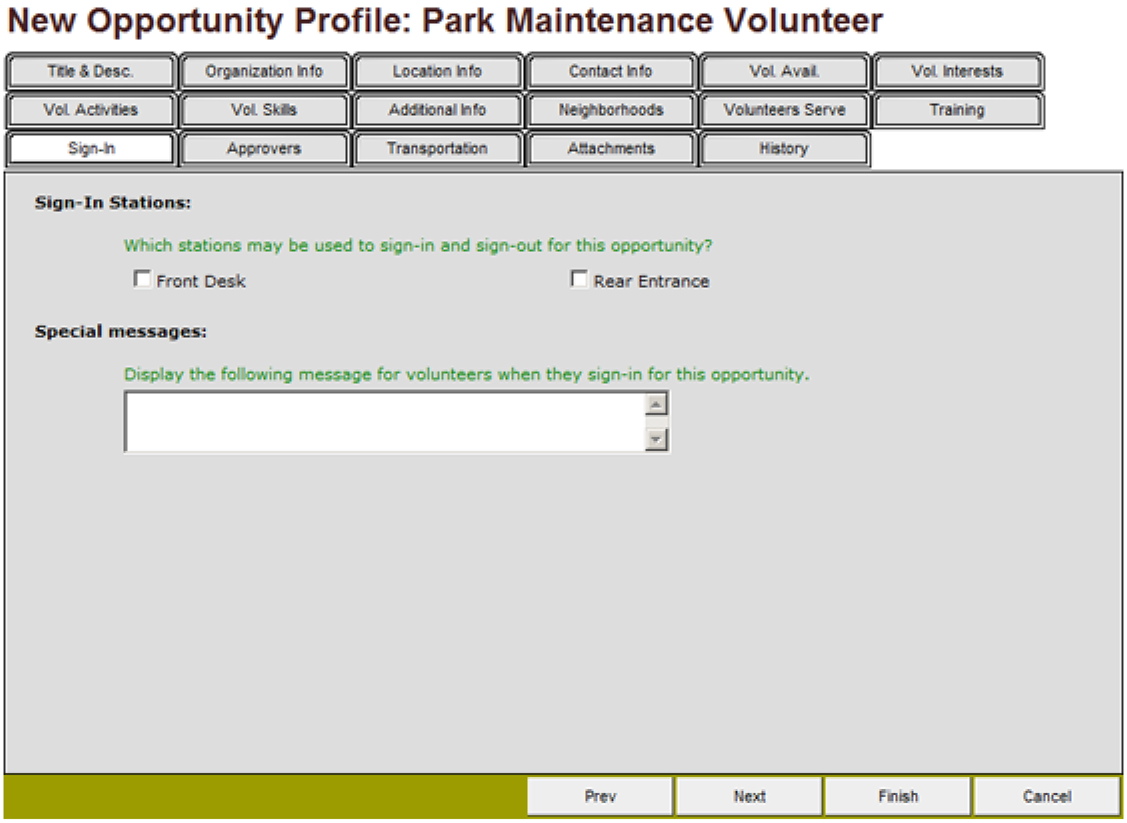
**Miscellaneous:** This tab is also known as the User Defined tab, meaning that you, the user, define what fields appear here. Since this tab is generally administrated by program heads, not all eCoordinator users will have the ability to define their own fields. Training on this tab will be done on a case-by-case basis.


New Opportunity Profile: Park Maintenance Volunteer

What Type Of Opportunity is This?: ----------------

Title & Desc.
Organization Info
Location Info
Contact Info
Vol. Avail.
Vol. Interests
Vol. Activities
Vol. Skills
Additional Info
Neighborhoods
Volunteers Serve
Miscellaneous
Sign-In
Approvers
Transportation
Attachments
History
Opportunity Type
Prev
Next
Finish
Cancel

**Sign-In:** If your opportunity utilizes Sign-In, please use this tab to associate the appropriate Sign-In Station with this opportunity. Sign-In setup will not be covered in this manual. Please reference the Help file (Menu> Help> Help) for instructions on Sign-In.


New Opportunity Profile: Park Maintenance Volunteer

**Sign-In Stations:**

Which stations may be used to sign-in and sign-out for this opportunity?

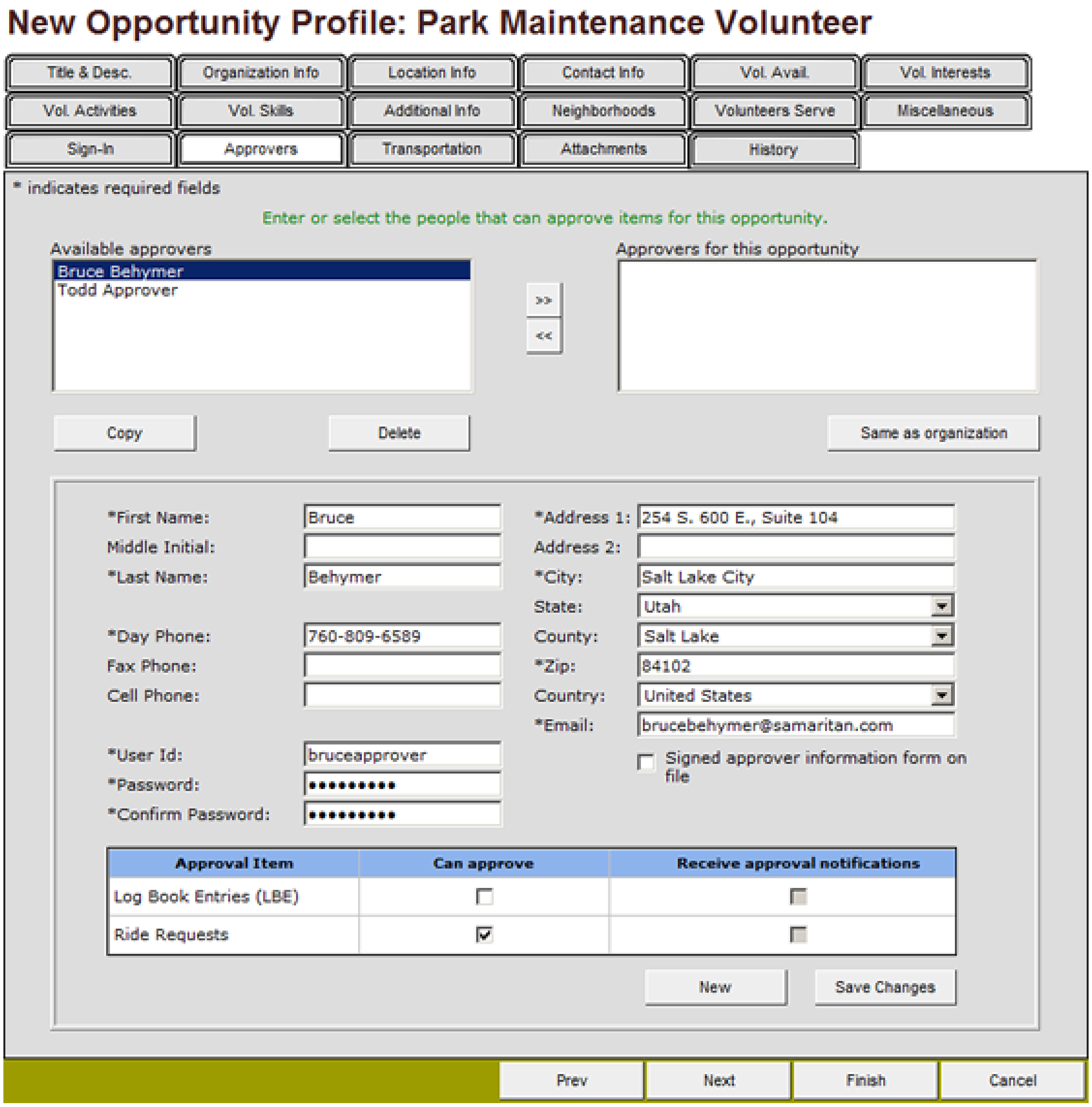
☐ Front Desk ☐ Rear Entrance

**Special messages:**

Display the following message for volunteers when they sign-in for this opportunity.

Title & Desc.
Organization Info
Location Info
Contact Info
Vol. Avail.
Vol. Interests
Vol. Activities
Vol. Skills
Additional Info
Neighborhoods
Volunteers Serve
Training
Sign-In
Approvers
Transportation
Attachments
History
Prev
Next
Finish
Cancel

**Approvers:** Not all eCoordinators will use or have access to this tab. It is used to set up and administer "Approver" personnel who do NOT have eCoordinator access. Approvers have the ability to view and approve (or disapprove) log book entries without having access to eCoordinator.


Title & Desc.
Organization Info
Location Info
Contact Info
Vol. Avail.
Vol. Interests
Vol. Activities
Vol. Skills
Additional Info
Neighborhoods
Volunteers Serve
Miscellaneous
Sign-In
Approvers
Transportation
Attachments
History
>>
<<
Copy
Delete
Same as organization
New
Save Changes
Prev
Next
Finish
Cancel

New Opportunity Profile: Park Maintenance Volunteer

* indicates required fields

Enter or select the people that can approve items for this opportunity.

Available approvers
- Bruce Behymer
- Todd Approver

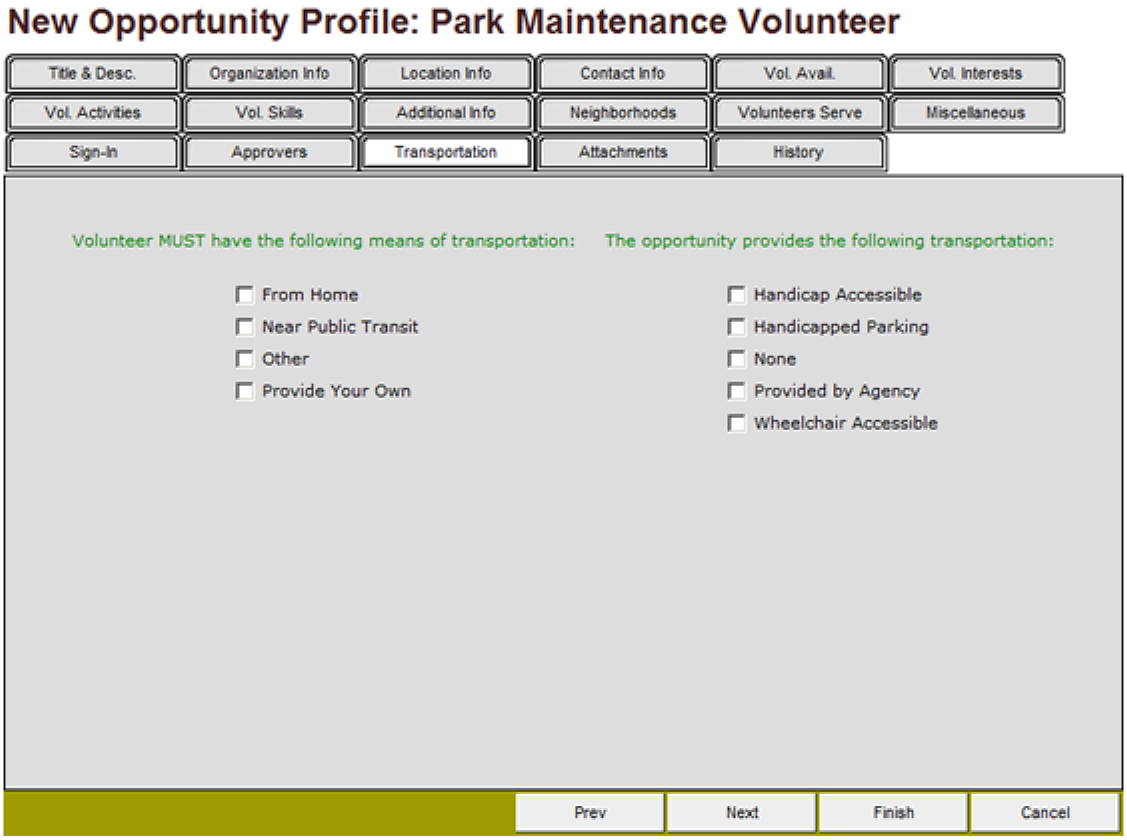
Approvers for this opportunity

*First Name: Bruce
Middle Initial:
*Last Name: Behymer
*Day Phone: 760-809-6589
Fax Phone:
Cell Phone:
*User Id: bruceapprover
*Password: ••••••••••
*Confirm Password: ••••••••••

*Address 1: 254 S. 600 E., Suite 104
Address 2:
*City: Salt Lake City
State: Utah
County: Salt Lake
*Zip: 84102
Country: United States
*Email: brucebehymer@samaritan.com
☐ Signed approver information form on file

| Approval Item | Can approve | Receive approval notifications |
|---|---|---|
| Log Book Entries (LBE) | ☐ | ☐ |
| Ride Requests | ☑ | ☐ |

**Transportation:** Define what transportation the volunteer must possess or use, and also what kind of transportation this opportunity may provide for volunteers to use.



New Opportunity Profile: Park Maintenance Volunteer

Title & Desc.
Organization Info
Location Info
Contact Info
Vol. Avail.
Vol. Interests
Vol. Activities
Vol. Skills
Additional Info
Neighborhoods
Volunteers Serve
Miscellaneous
Sign-In
Approvers
Transportation
Attachments
History

Volunteer MUST have the following means of transportation:

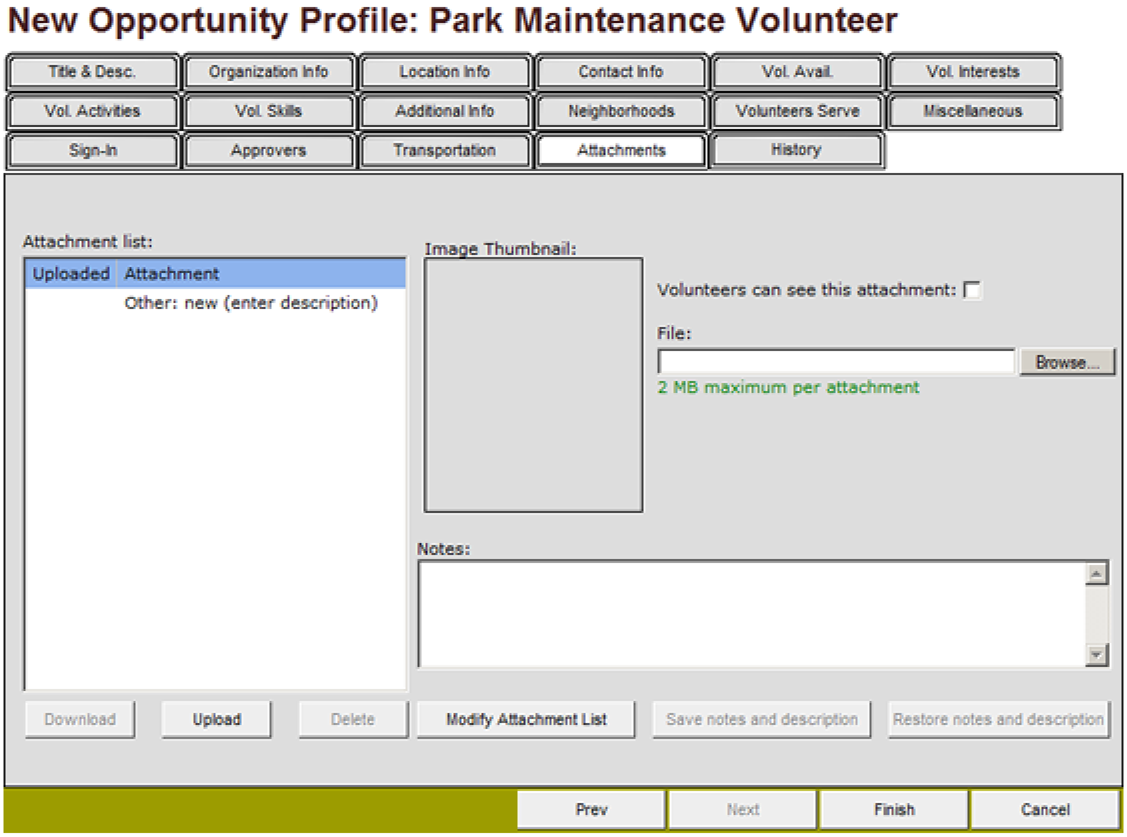
☐ From Home
☐ Near Public Transit
☐ Other
☐ Provide Your Own

The opportunity provides the following transportation:

☐ Handicap Accessible
☐ Handicapped Parking
☐ None
☐ Provided by Agency
☐ Wheelchair Accessible

Prev
Next
Finish
Cancel

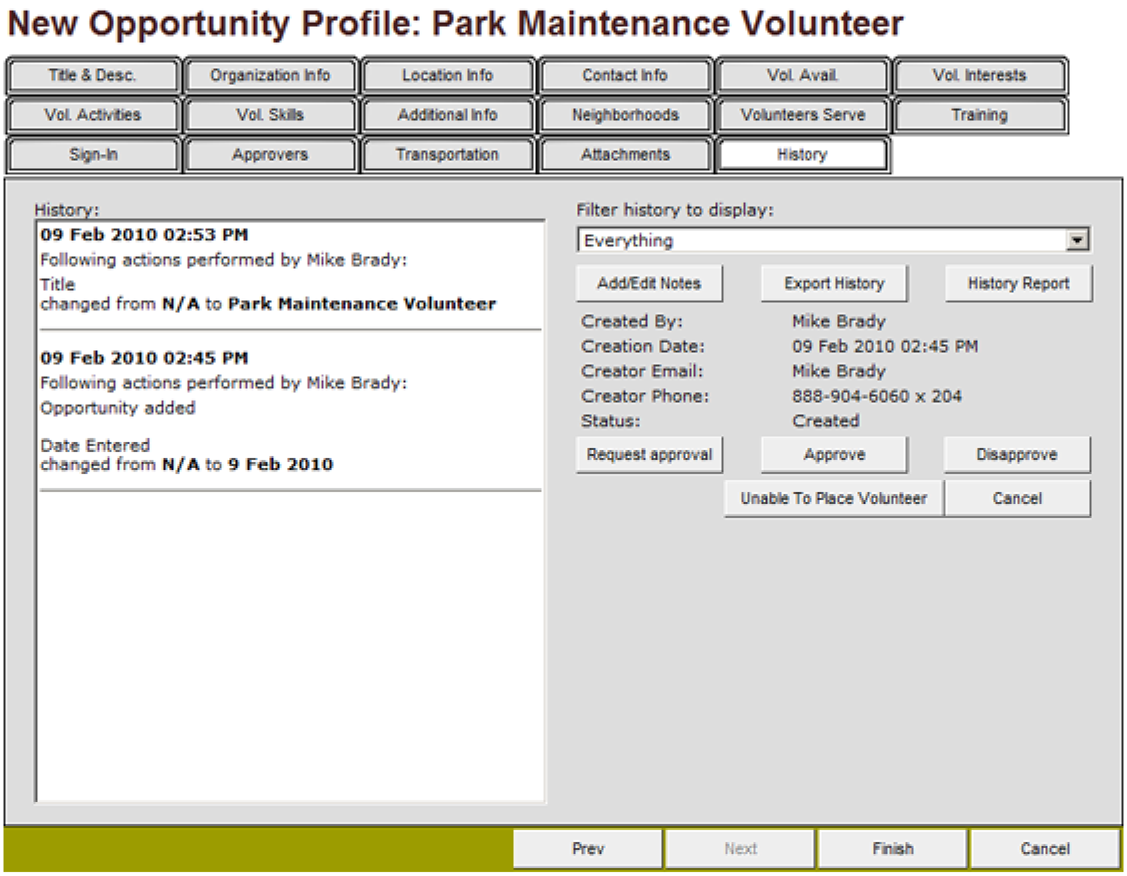
**Attachments:** eCoordinator has the ability to attach files to different profiles, such as images, documents, etc. Use this tab to attach files, as well as enter notes about the attachments. Note: there is a 2MiB maximum limit for each file.



New Opportunity Profile: Park Maintenance Volunteer

Title & Desc.
Organization Info
Location Info
Contact Info
Vol. Avail.
Vol. Interests
Vol. Activities
Vol. Skills
Additional Info
Neighborhoods
Volunteers Serve
Miscellaneous
Sign-In
Approvers
Transportation
Attachments
History
Attachment list:
Uploaded
Attachment
Other: new (enter description)
Image Thumbnail:
Volunteers can see this attachment: ☐
File:
Browse...
2 MB maximum per attachment
Notes:
Download
Upload
Delete
Modify Attachment List
Save notes and description
Restore notes and description
Prev
Next
Finish
Cancel

**History:** The History tab keeps an audit trail of all changes to the profile. This includes placements and referrals, changes to any of the data fields in the profile, and you can even add your own notes. You can generate a history report, and approve profiles from this tab as well. All entries are time and date stamped, and included the name or login of the individual who made the change.


Title & Desc.
Organization Info
Location Info
Contact Info
Vol. Avail.
Vol. Interests
Vol. Activities
Vol. Skills
Additional Info
Neighborhoods
Volunteers Serve
Training
Sign-In
Approvers
Transportation
Attachments
History
Add/Edit Notes
Export History
History Report
Request approval
Approve
Disapprove
Unable To Place Volunteer
Cancel
Prev
Next
Finish
Cancel

New Opportunity Profile: Park Maintenance Volunteer

History:

**09 Feb 2010 02:53 PM**
Following actions performed by Mike Brady:
Title
changed from **N/A** to **Park Maintenance Volunteer**

**09 Feb 2010 02:45 PM**
Following actions performed by Mike Brady:
Opportunity added

Date Entered
changed from **N/A** to **9 Feb 2010**

Filter history to display: Everything

| | |
|---|---|
| Created By: | Mike Brady |
| Creation Date: | 09 Feb 2010 02:45 PM |
| Creator Email: | Mike Brady |
| Creator Phone: | 888-904-6060 x 204 |
| Status: | Created |

Please always make sure to click the "Finish" button when completing any profile.

## 2.4 Data Entry Practice: Opportunity

P
Practice

**Practice Instructions:**

1. Create a new opportunity for your organization
2. Make the description sound enticing
3. The more check boxes you select, the better--they appear on your eRecruiter!

**Action:** Point out these instructions and monitor trainees.

## 2.5 Data Entry Review: Opportunity

R
Review

**My Personal Review:**

1. Which tab is used by the search function of your eRecruiter to help volunteers find opportunities?

   ________________________________________

2. When creating service opportunities, why is it better to select as many check boxes as appropriate?

   ________________________________________

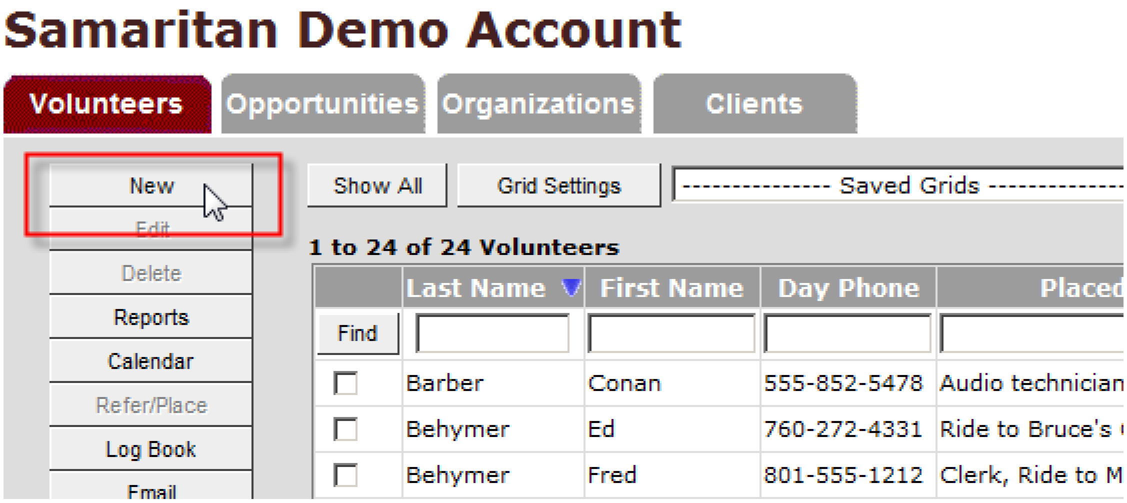
**Answer Key:**

1. Differs for each customer
2. It improves relative opportunity search results on eRecruiter, and helps eCoordinator match appropriate volunteers with the opportunity.

## 2.6 Data Entry Demonstration: Volunteers

**D**
Demo

As much as possible, volunteers should enter their own data through the eRecruiter website. However, coordinators can enter this data for volunteers directly through eCoordinator when needed. To access the new volunteer profile, click the “New” button on the “Volunteers” tab. Or, try right-clicking on the grid and selecting "New."

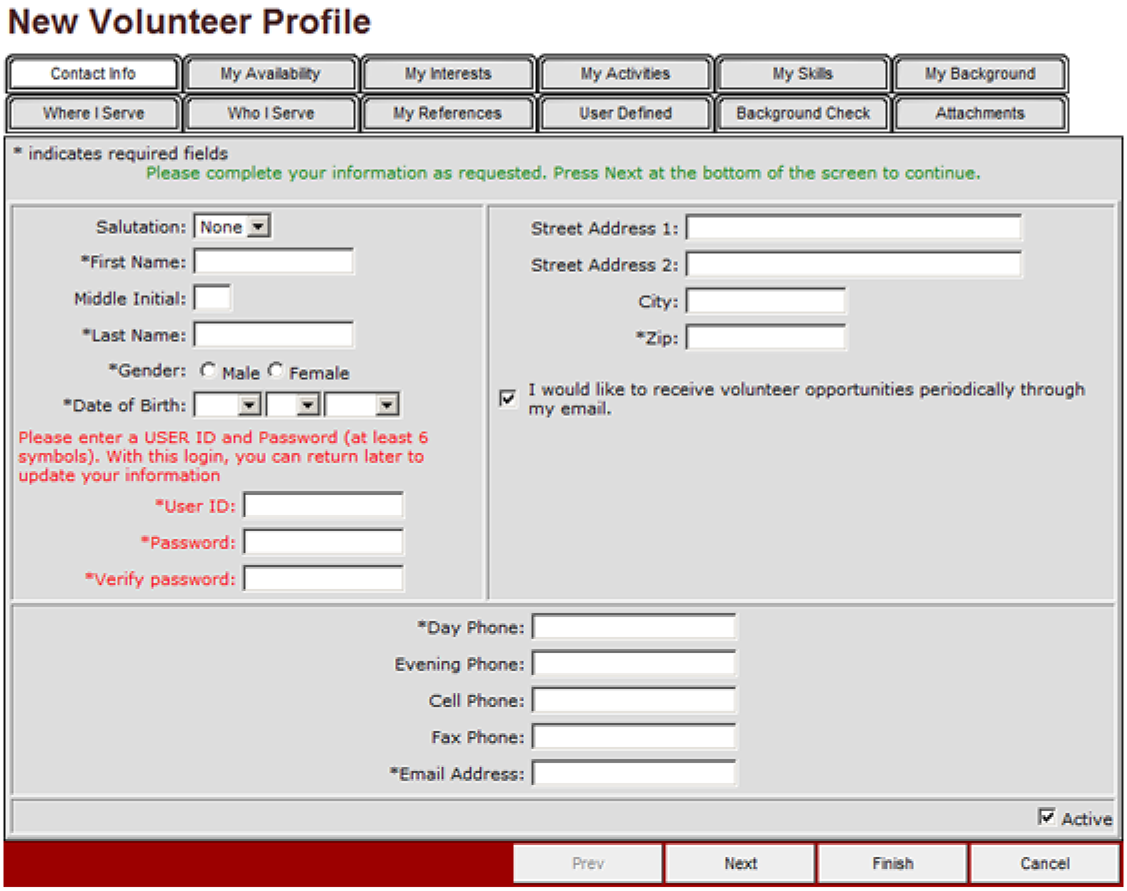

Samaritan Demo Account
Volunteers
Opportunities
Organizations
Clients
New
Edit
Delete
Reports
Calendar
Refer/Place
Log Book
Email
Show All
Grid Settings
--------------- Saved Grids --------------

**1 to 24 of 24 Volunteers**

| | Last Name ▼ | First Name | Day Phone | Placed |
|---|---|---|---|---|
| Find | | | | |
| ☐ | Barber | Conan | 555-852-5478 | Audio technician |
| ☐ | Behymer | Ed | 760-272-4331 | Ride to Bruce's |
| ☐ | Behymer | Fred | 801-555-1212 | Clerk, Ride to M |

**Contact Info:** This tab contains critical information such as volunteer name, address and all other contact information. It is also where to find the volunteer's User ID and Password to access their profile on eRecruiter. If a volunteer ever forgets this login information, eCoordinator users may restore or reset the User ID. Passwords are blocked out, so eCoordinators may reset the Password from this tab.

Notice the required fields are marked with an asterisk (*):


New Volunteer Profile
Contact Info
My Availability
My Interests
My Activities
My Skills
My Background
Where I Serve
Who I Serve
My References
User Defined
Background Check
Attachments
*First Name:
Middle Initial:
*Last Name:
*Gender: ○ Male ○ Female
*Date of Birth:
*User ID:
*Password:
*Verify password:
Street Address 1:
Street Address 2:
City:
*Zip:
*Day Phone:
Evening Phone:
Cell Phone:
Fax Phone:
*Email Address:
Prev
Next
Finish
Cancel

* indicates required fields

Please complete your information as requested. Press Next at the bottom of the screen to continue.

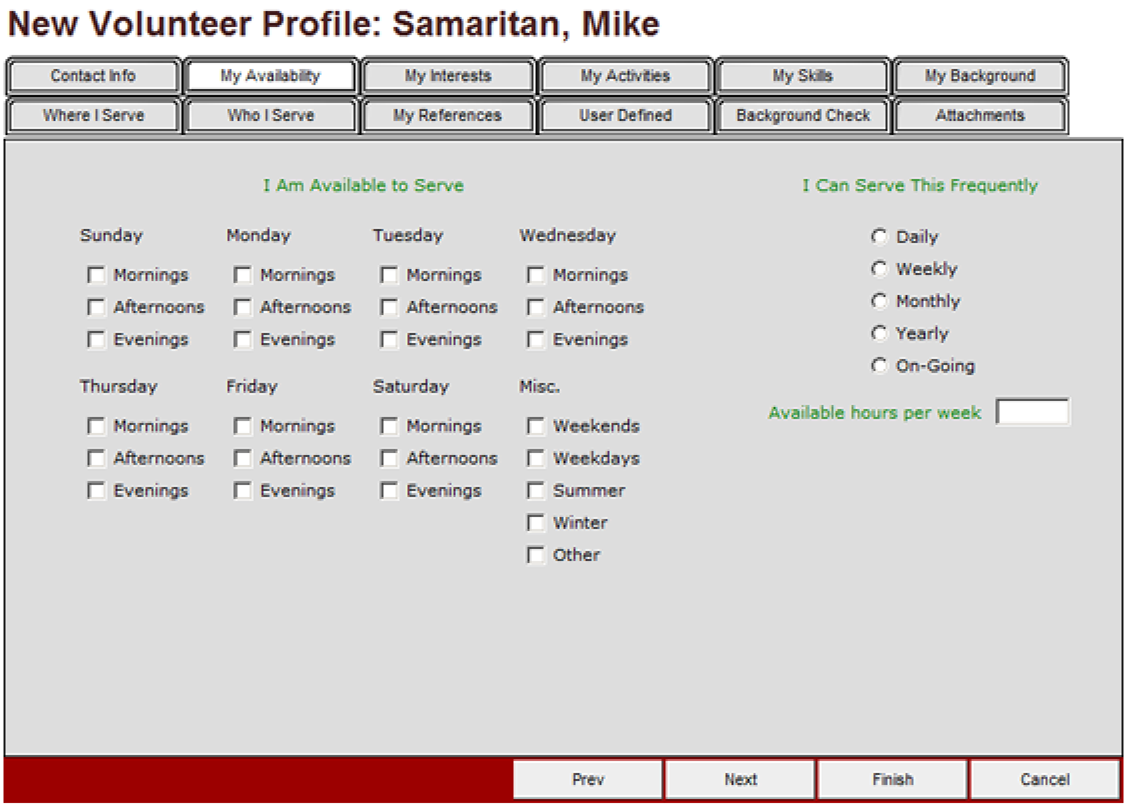
Salutation: None

Please enter a USER ID and Password (at least 6 symbols). With this login, you can return later to update your information

☑ I would like to receive volunteer opportunities periodically through my email.

☑ Active

**My Availability:** Select the time(s) when volunteer will be able to serve, and how often. Take note that this screen is identical to the screen of the same name on the opportunity profile. This is to help the system search and sort through the profiles, or match volunteers with opportunities if the same box is checked on both screens. These topics will be discussed later in this training.


New Volunteer Profile: Samaritan, Mike
Contact Info
My Availability
My Interests
My Activities
My Skills
My Background
Where I Serve
Who I Serve
My References
User Defined
Background Check
Attachments
Prev
Next
Finish
Cancel

I Am Available to Serve

Sunday
☐ Mornings
☐ Afternoons
☐ Evenings

Monday
☐ Mornings
☐ Afternoons
☐ Evenings

Tuesday
☐ Mornings
☐ Afternoons
☐ Evenings

Wednesday
☐ Mornings
☐ Afternoons
☐ Evenings

Thursday
☐ Mornings
☐ Afternoons
☐ Evenings

Friday
☐ Mornings
☐ Afternoons
☐ Evenings

Saturday
☐ Mornings
☐ Afternoons
☐ Evenings

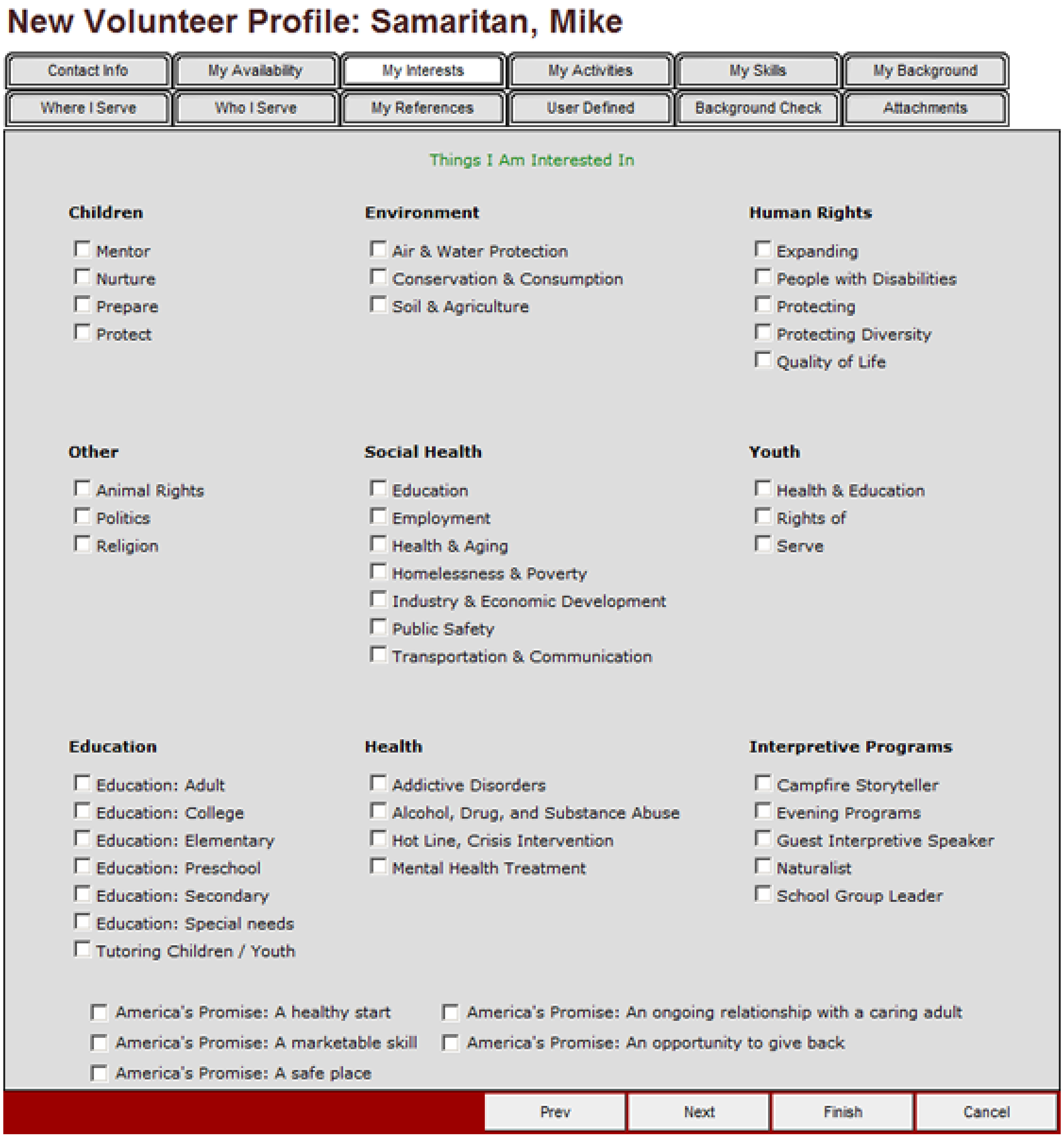
Misc.
☐ Weekends
☐ Weekdays
☐ Summer
☐ Winter
☐ Other

I Can Serve This Frequently

○ Daily
○ Weekly
○ Monthly
○ Yearly
○ On-Going

Available hours per week

**My Interests:** This tab contains several interests that will help to match your volunteer with opportunities that interest them. None are necessary, but information will help to more closely match your volunteers to opportunities that they will enjoy. Again, this screen will help match volunteers with opportunities.



New Volunteer Profile: Samaritan, Mike

Contact Info
My Availability
My Interests
My Activities
My Skills
My Background
Where I Serve
Who I Serve
My References
User Defined
Background Check
Attachments

Things I Am Interested In

**Children**

☐ Mentor
☐ Nurture
☐ Prepare
☐ Protect

**Environment**

☐ Air & Water Protection
☐ Conservation & Consumption
☐ Soil & Agriculture

**Human Rights**

☐ Expanding
☐ People with Disabilities
☐ Protecting
☐ Protecting Diversity
☐ Quality of Life

**Other**

☐ Animal Rights
☐ Politics
☐ Religion

**Social Health**

☐ Education
☐ Employment
☐ Health & Aging
☐ Homelessness & Poverty
☐ Industry & Economic Development
☐ Public Safety
☐ Transportation & Communication

**Youth**

☐ Health & Education
☐ Rights of
☐ Serve

**Education**

☐ Education: Adult
☐ Education: College
☐ Education: Elementary
☐ Education: Preschool
☐ Education: Secondary
☐ Education: Special needs
☐ Tutoring Children / Youth

**Health**

☐ Addictive Disorders
☐ Alcohol, Drug, and Substance Abuse
☐ Hot Line, Crisis Intervention
☐ Mental Health Treatment

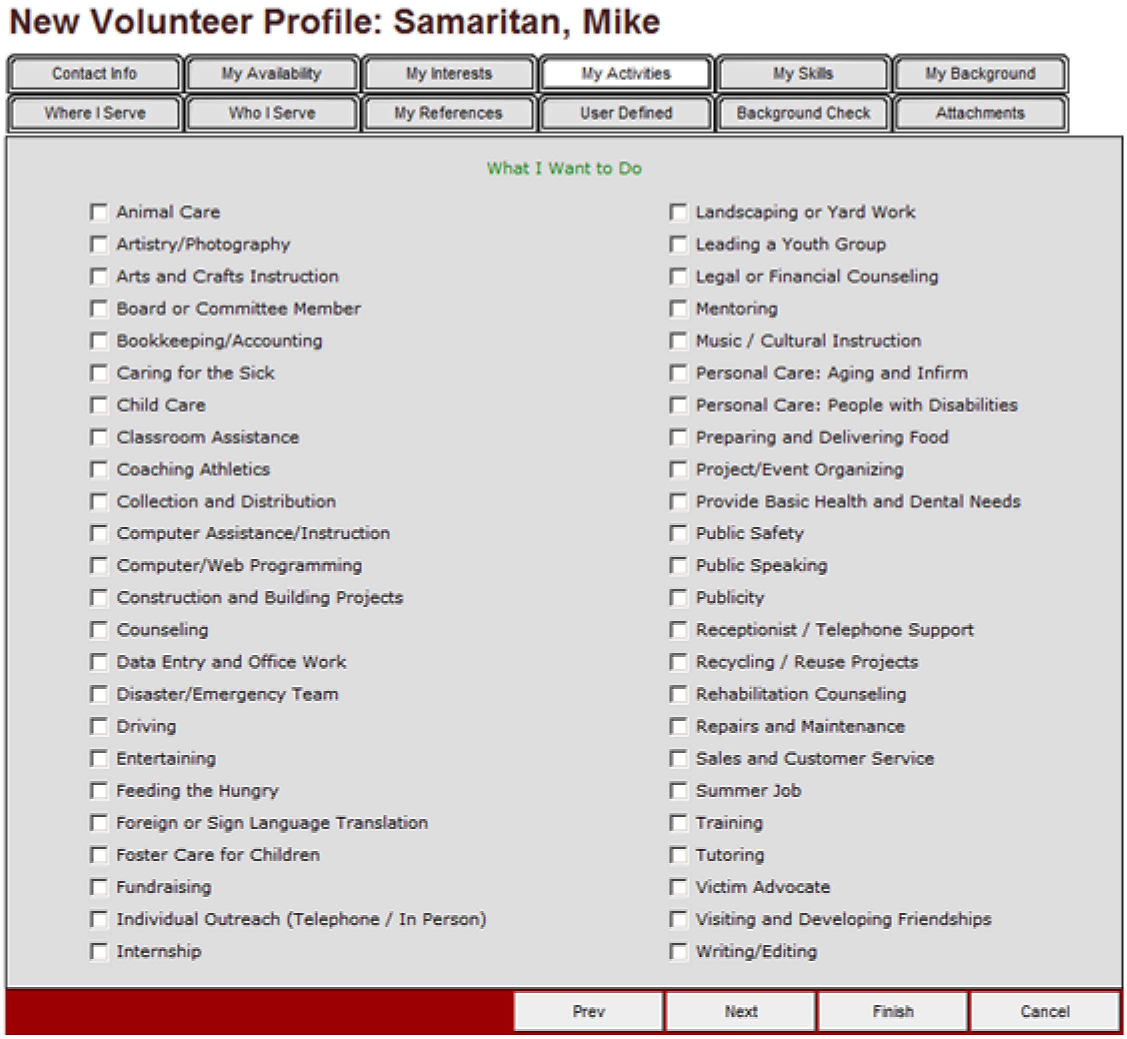
**Interpretive Programs**

☐ Campfire Storyteller
☐ Evening Programs
☐ Guest Interpretive Speaker
☐ Naturalist
☐ School Group Leader

☐ America's Promise: A healthy start
☐ America's Promise: A marketable skill
☐ America's Promise: A safe place
☐ America's Promise: An ongoing relationship with a caring adult
☐ America's Promise: An opportunity to give back

Prev
Next
Finish
Cancel

**My Activities:** This screen allows volunteers to identify the kinds of things they prefer to do when volunteering. Again, this screen will help match volunteers with opportunities.

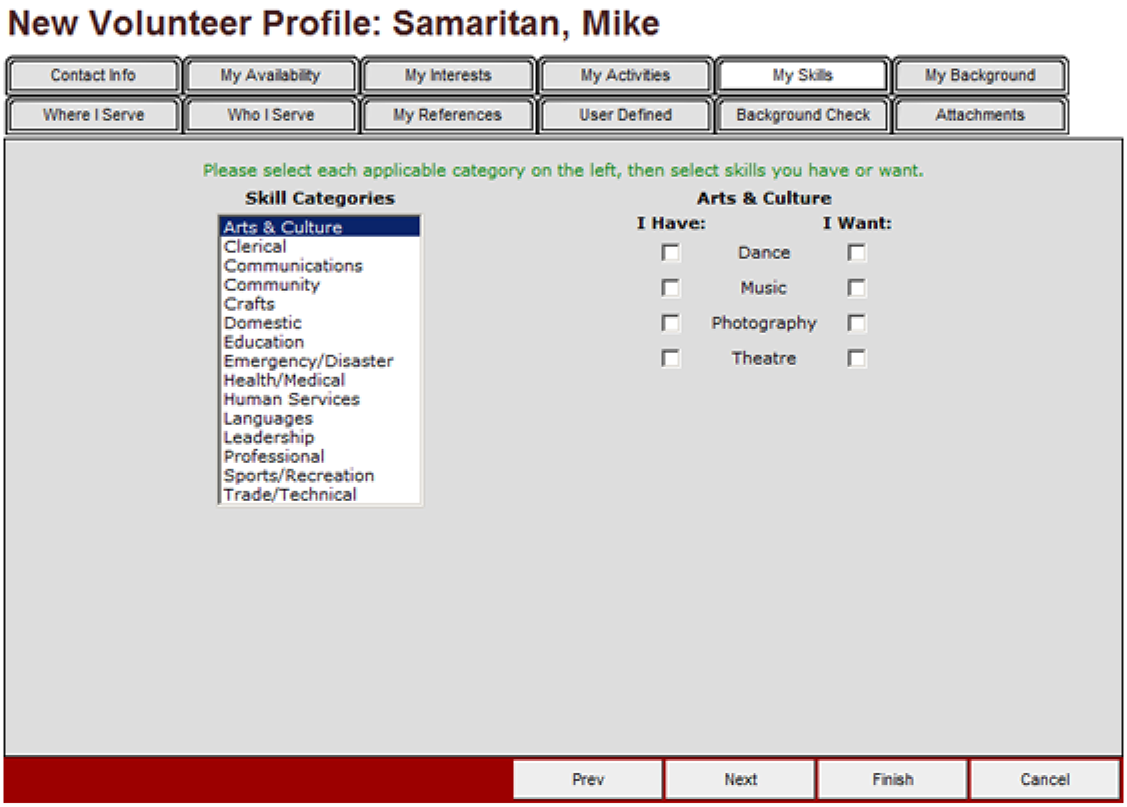

Contact Info
My Availability
My Interests
My Activities
My Skills
My Background
Where I Serve
Who I Serve
My References
User Defined
Background Check
Attachments
Prev
Next
Finish
Cancel

New Volunteer Profile: Samaritan, Mike

What I Want to Do

☐ Animal Care
☐ Artistry/Photography
☐ Arts and Crafts Instruction
☐ Board or Committee Member
☐ Bookkeeping/Accounting
☐ Caring for the Sick
☐ Child Care
☐ Classroom Assistance
☐ Coaching Athletics
☐ Collection and Distribution
☐ Computer Assistance/Instruction
☐ Computer/Web Programming
☐ Construction and Building Projects
☐ Counseling
☐ Data Entry and Office Work
☐ Disaster/Emergency Team
☐ Driving
☐ Entertaining
☐ Feeding the Hungry
☐ Foreign or Sign Language Translation
☐ Foster Care for Children
☐ Fundraising
☐ Individual Outreach (Telephone / In Person)
☐ Internship
☐ Landscaping or Yard Work
☐ Leading a Youth Group
☐ Legal or Financial Counseling
☐ Mentoring
☐ Music / Cultural Instruction
☐ Personal Care: Aging and Infirm
☐ Personal Care: People with Disabilities
☐ Preparing and Delivering Food
☐ Project/Event Organizing
☐ Provide Basic Health and Dental Needs
☐ Public Safety
☐ Public Speaking
☐ Publicity
☐ Receptionist / Telephone Support
☐ Recycling / Reuse Projects
☐ Rehabilitation Counseling
☐ Repairs and Maintenance
☐ Sales and Customer Service
☐ Summer Job
☐ Training
☐ Tutoring
☐ Victim Advocate
☐ Visiting and Developing Friendships
☐ Writing/Editing

**My Skills:** This screen can be used to help the volunteer identify either 1) what skills volunteers already have, or 2) what skills they would like to receive training in, as pertaining to an opportunity. Select the skill group on the left, then select either "I Have" or "I Want" on the right. Again, this screen will help match volunteers with opportunities.

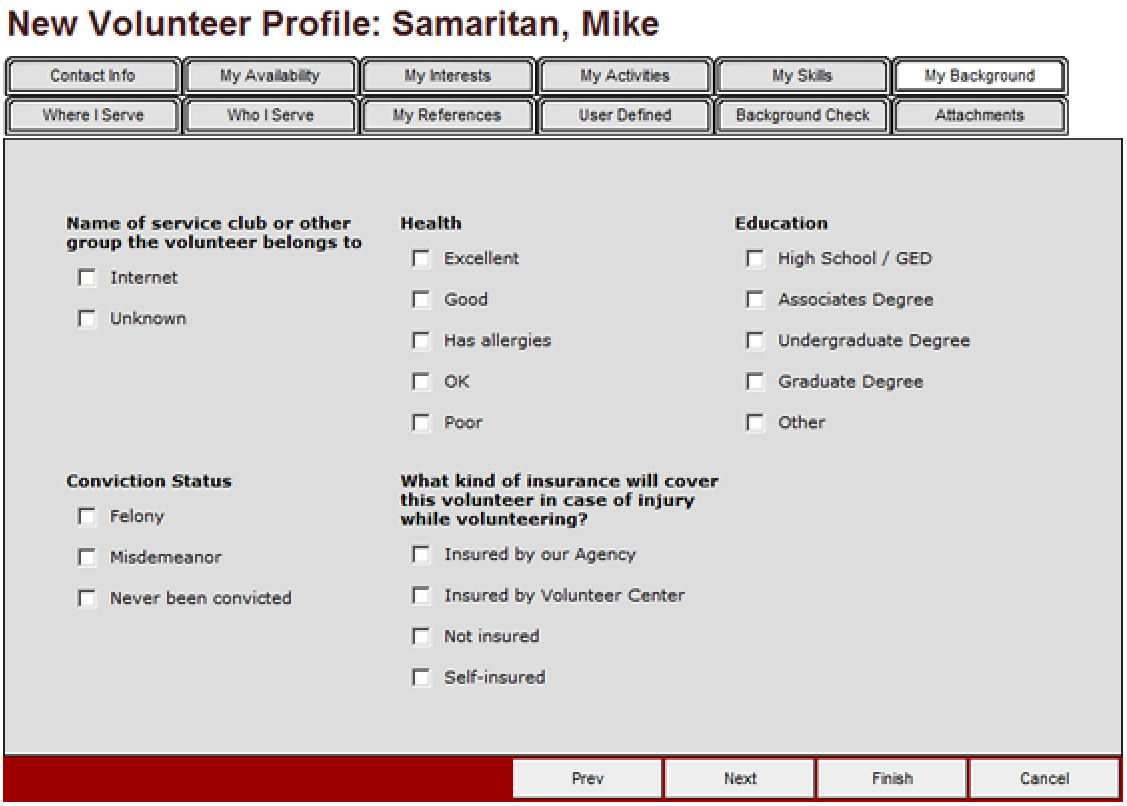

New Volunteer Profile: Samaritan, Mike
Contact Info
My Availability
My Interests
My Activities
My Skills
My Background
Where I Serve
Who I Serve
My References
User Defined
Background Check
Attachments
Skill Categories
Arts & Culture
Clerical
Communications
Community
Crafts
Domestic
Education
Emergency/Disaster
Health/Medical
Human Services
Languages
Leadership
Professional
Sports/Recreation
Trade/Technical
Prev
Next
Finish
Cancel

Please select each applicable category on the left, then select skills you have or want.

**Arts & Culture**

| I Have: | | I Want: |
|---|---|---|
| ☐ | Dance | ☐ |
| ☐ | Music | ☐ |
| ☐ | Photography | ☐ |
| ☐ | Theatre | ☐ |

**My Background:** This screen can be used to track information such as volunteer health, education, conviction status, etc.


Contact Info
My Availability
My Interests
My Activities
My Skills
My Background
Where I Serve
Who I Serve
My References
User Defined
Background Check
Attachments
Prev
Next
Finish
Cancel

New Volunteer Profile: Samaritan, Mike

**Name of service club or other group the volunteer belongs to**

☐ Internet

☐ Unknown

**Health**

☐ Excellent

☐ Good

☐ Has allergies

☐ OK

☐ Poor

**Education**

☐ High School / GED

☐ Associates Degree

☐ Undergraduate Degree

☐ Graduate Degree

☐ Other

**Conviction Status**

☐ Felony

☐ Misdemeanor

☐ Never been convicted

**What kind of insurance will cover this volunteer in case of injury while volunteering?**

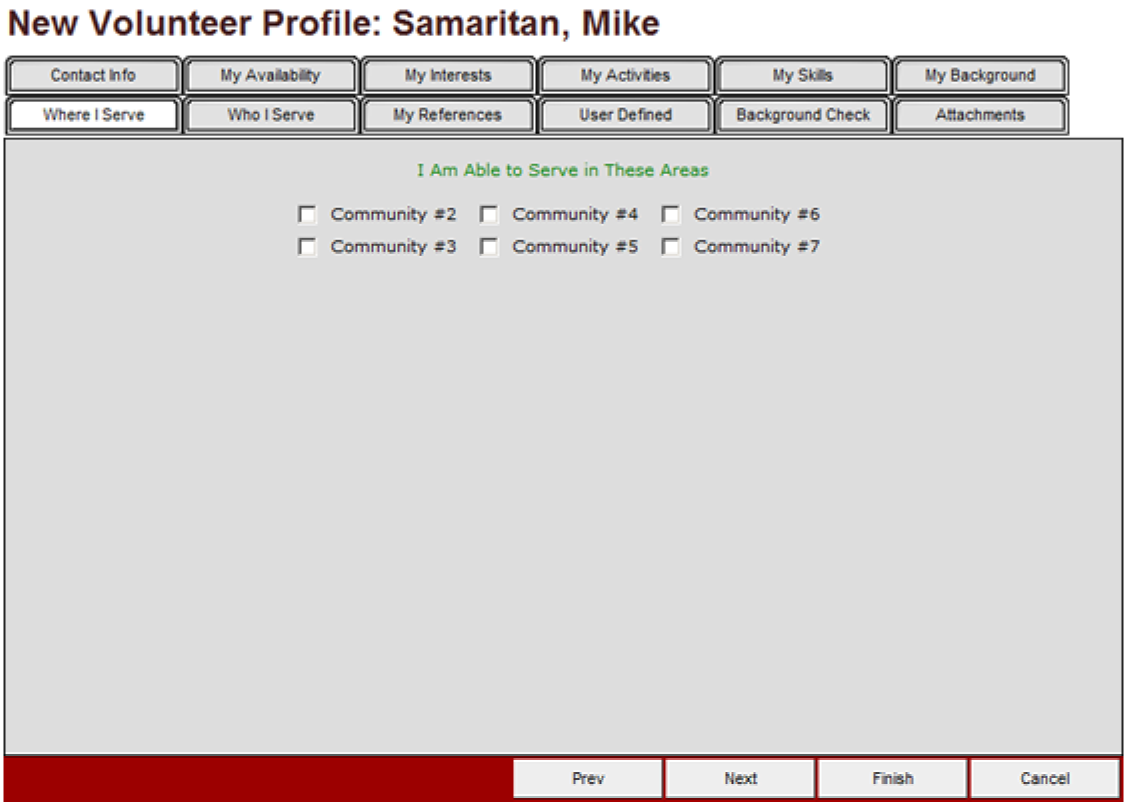
☐ Insured by our Agency

☐ Insured by Volunteer Center

☐ Not insured

☐ Self-insured

**Where I Serve:** Volunteers can indicate which geographic areas or neighborhoods in which they are willing to serve. Again, this screen will help match volunteers with opportunities.



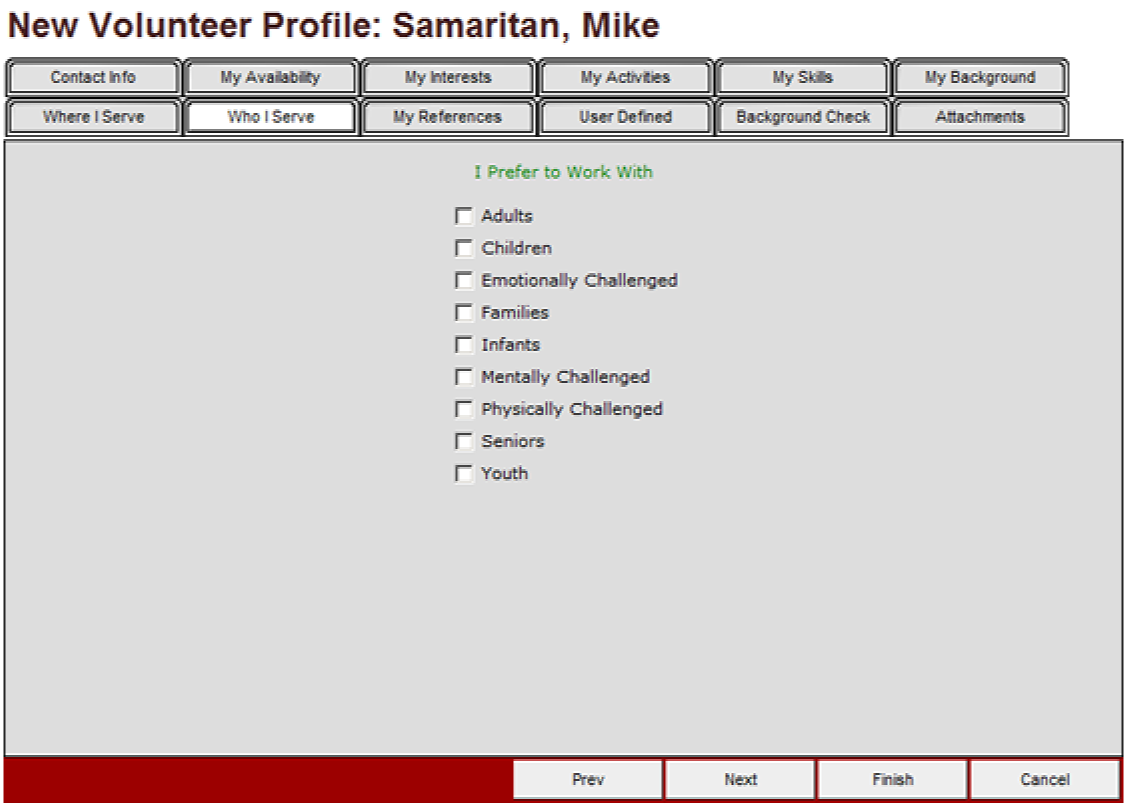
New Volunteer Profile: Samaritan, Mike

I Am Able to Serve in These Areas

☐ Community #2 ☐ Community #4 ☐ Community #6
☐ Community #3 ☐ Community #5 ☐ Community #7

Contact Info
My Availability
My Interests
My Activities
My Skills
My Background
Where I Serve
Who I Serve
My References
User Defined
Background Check
Attachments
Prev
Next
Finish
Cancel

**Who I Serve:** Use this screen to identify which population the volunteers are most interested in serving. Again, this screen will help match volunteers with opportunities.

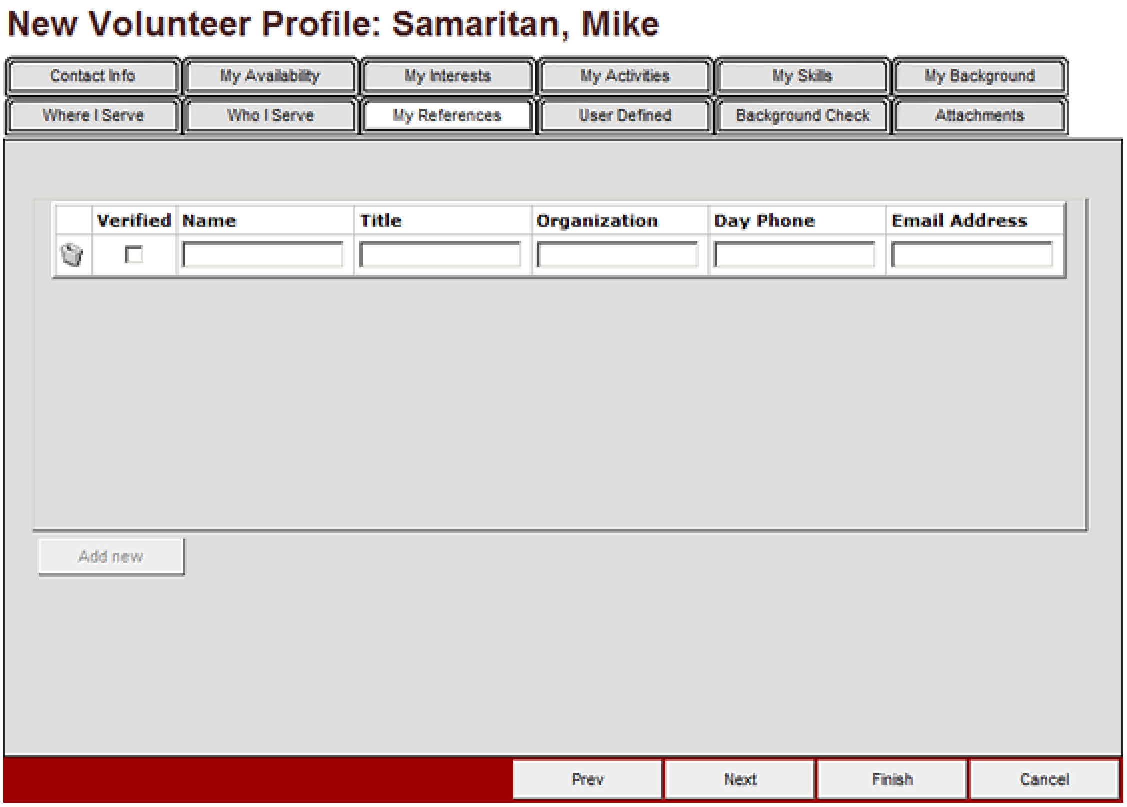

Contact Info
My Availability
My Interests
My Activities
My Skills
My Background
Where I Serve
Who I Serve
My References
User Defined
Background Check
Attachments
Prev
Next
Finish
Cancel

New Volunteer Profile: Samaritan, Mike

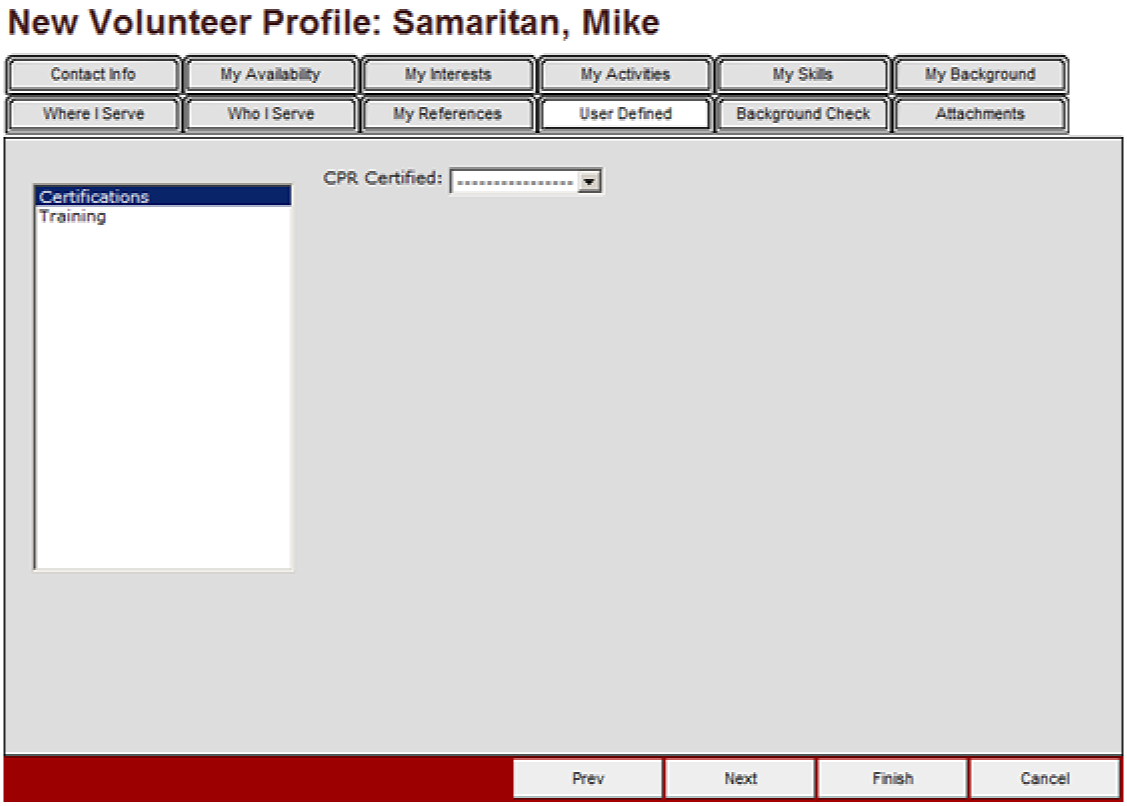
I Prefer to Work With

- ☐ Adults
- ☐ Children
- ☐ Emotionally Challenged
- ☐ Families
- ☐ Infants
- ☐ Mentally Challenged
- ☐ Physically Challenged
- ☐ Seniors
- ☐ Youth

**My References:** This screen will collect volunteer references, if your organization requires them prior to allowing individuals to volunteer.

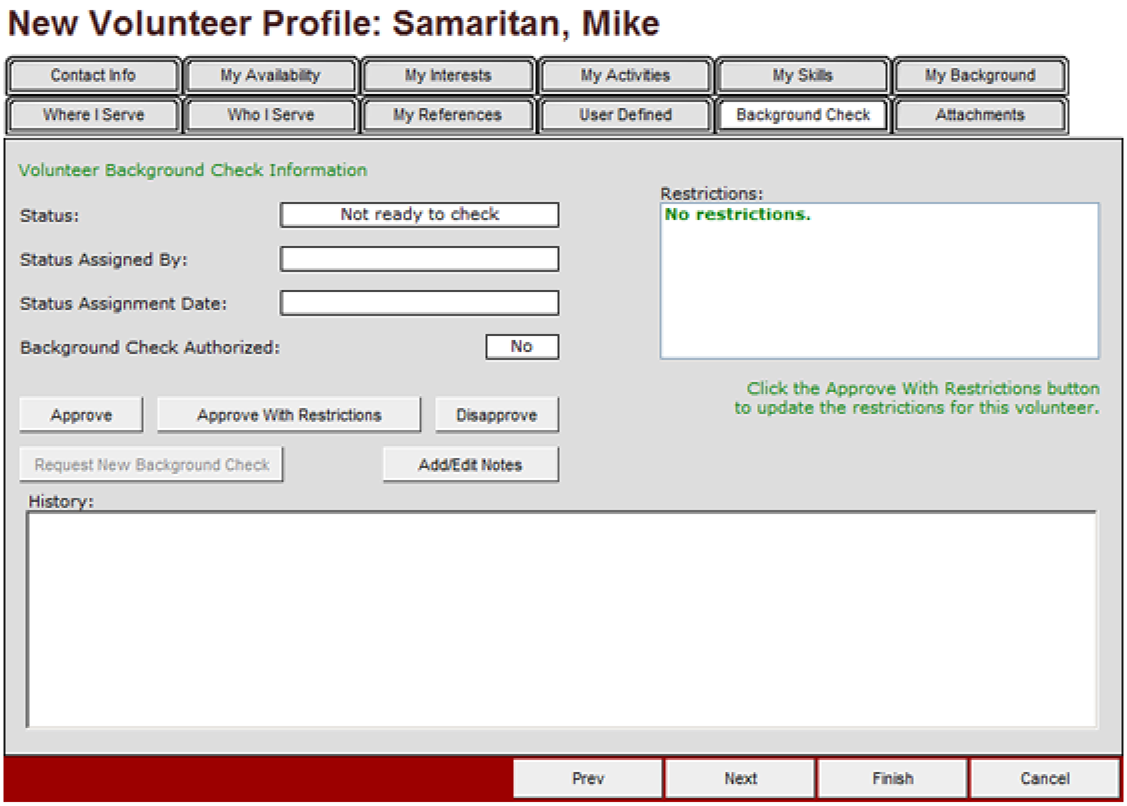

New Volunteer Profile: Samaritan, Mike
Contact Info
My Availability
My Interests
My Activities
My Skills
My Background
Where I Serve
Who I Serve
My References
User Defined
Background Check
Attachments
Verified
Name
Title
Organization
Day Phone
Email Address
Add new
Prev
Next
Finish
Cancel

**User Defined:** This tab is  known as the User Defined tab, meaning that you, the user, define what fields appear here. Since this tab is generally administrated by program heads, not all eCoordinator users will have the ability to define their own fields. Training on this tab will be done on a case-by-case basis.


New Volunteer Profile: Samaritan, Mike

Contact Info
My Availability
My Interests
My Activities
My Skills
My Background
Where I Serve
Who I Serve
My References
User Defined
Background Check
Attachments
Certifications
Training
CPR Certified:
Prev
Next
Finish
Cancel

**Background Check:** Used in conjunction with Samaritan's Background Check System, this tab will only be seen by organizations who have contracted for access to it. Training will be provided separately.



New Volunteer Profile: Samaritan, Mike

Volunteer Background Check Information

Status: Not ready to check

Status Assigned By:

Status Assignment Date:

Background Check Authorized: No

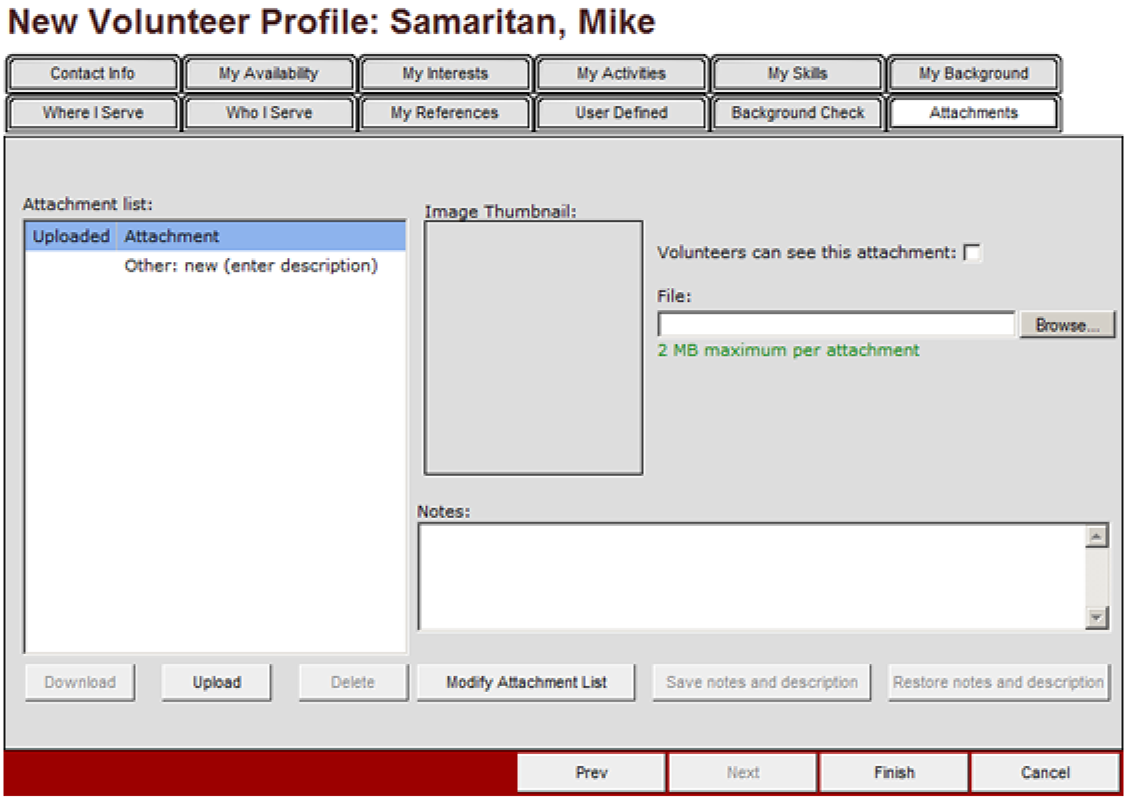
Restrictions:
No restrictions.

Click the Approve With Restrictions button to update the restrictions for this volunteer.

History:

Contact Info
My Availability
My Interests
My Activities
My Skills
My Background
Where I Serve
Who I Serve
My References
User Defined
Background Check
Attachments
Approve
Approve With Restrictions
Disapprove
Request New Background Check
Add/Edit Notes
Prev
Next
Finish
Cancel

**Attachments:** eCoordinator has the ability to attach files to different profiles, such as images, documents, etc. Use this tab to attach files, as well as enter notes about the attachments. Note: there is a 2MiB maximum limit for each file.



New Volunteer Profile: Samaritan, Mike

Attachment list:

| Uploaded | Attachment |
|---|---|
| | Other: new (enter description) |

Image Thumbnail:

Volunteers can see this attachment: ☐

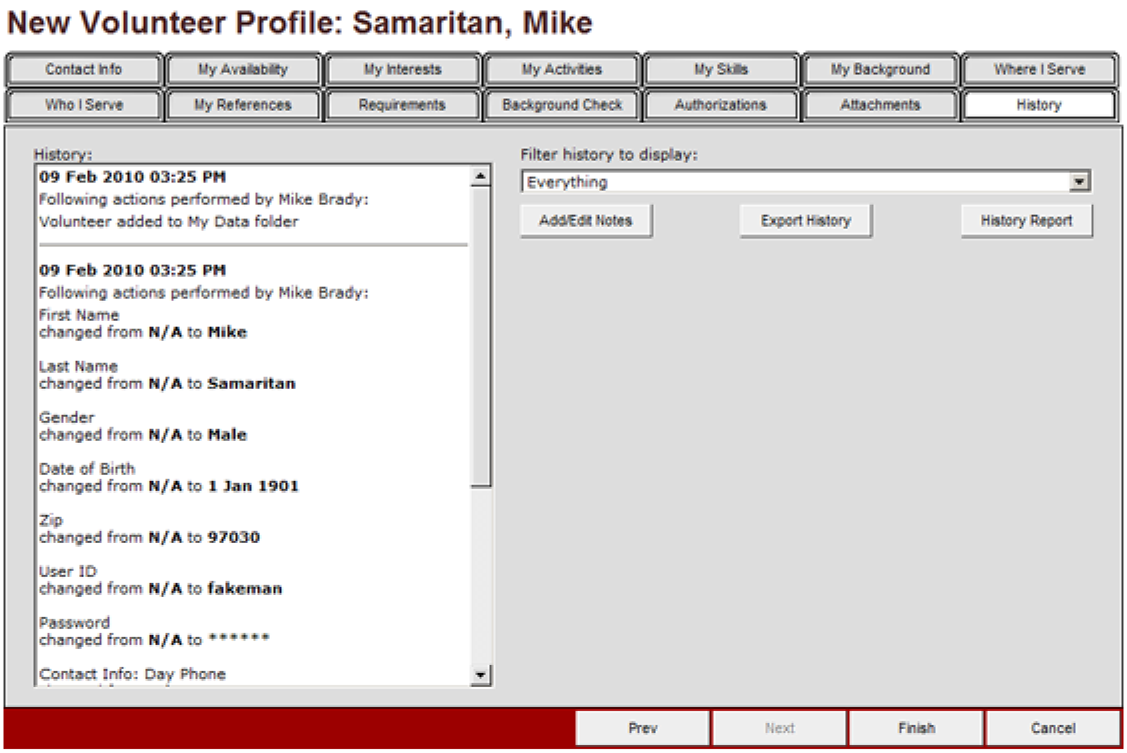
File:

2 MB maximum per attachment

Notes:

Contact Info
My Availability
My Interests
My Activities
My Skills
My Background
Where I Serve
Who I Serve
My References
User Defined
Background Check
Attachments
Browse...
Download
Upload
Delete
Modify Attachment List
Save notes and description
Restore notes and description
Prev
Next
Finish
Cancel

**History:** The History tab keeps an audit trail of all changes to the profile. This includes placements and referrals, changes to any of the data fields in the profile, and you can even add your own notes. You can also generate a history report. All entries are time and date stamped, and included the name or login of the individual who made the change.


Contact Info
My Availability
My Interests
My Activities
My Skills
My Background
Where I Serve
Who I Serve
My References
Requirements
Background Check
Authorizations
Attachments
History
Add/Edit Notes
Export History
History Report
Prev
Next
Finish
Cancel

New Volunteer Profile: Samaritan, Mike

History:

**09 Feb 2010 03:25 PM**
Following actions performed by Mike Brady:
Volunteer added to My Data folder

**09 Feb 2010 03:25 PM**
Following actions performed by Mike Brady:
First Name
changed from **N/A** to **Mike**

Last Name
changed from **N/A** to **Samaritan**

Gender
changed from **N/A** to **Male**

Date of Birth
changed from **N/A** to **1 Jan 1901**

Zip
changed from **N/A** to **97030**

User ID
changed from **N/A** to **fakeman**

Password
changed from **N/A** to ******

Contact Info: Day Phone

Filter history to display: Everything

Please always make sure to click the "Finish" button when completing any profile.

## 2.7 Data Entry Practice: Volunteers

P
Practice

**Practice Instructions:**

1. Create a fictitious volunteer
2. Volunteer should be able to serve in multiple areas
3. Volunteer should have at least one interest
4. Volunteer must authorize a background check

## 2.8 Data Entry Review: Volunteers

R
Review

**My Personal Review:**

1. Who *should* enter volunteer profiles into the system?

    ______________________________________

2. What problem(s) may occur when you have to enter a volunteer directly into eCoordinator?

    ______________________________________

    ______________________________________

    ______________________________________

**Answer Key:**

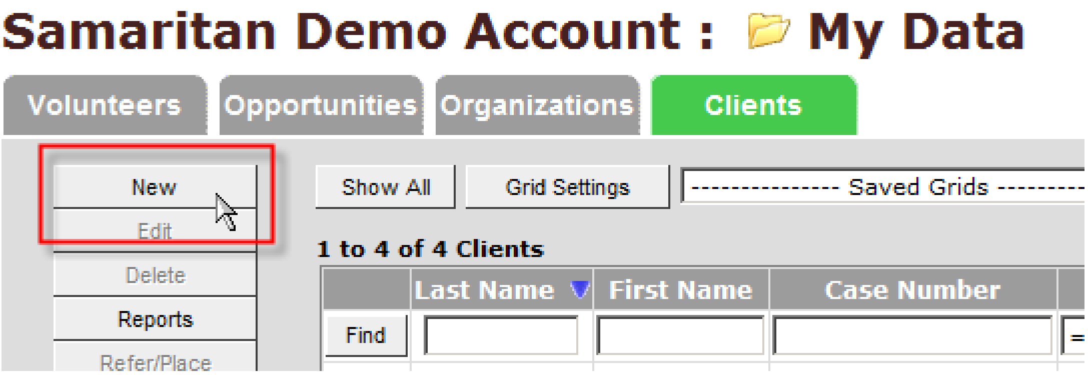
1. Volunteers should register themselves via eRecruiter.
2. Potential answers may include:
    a) Having to communicate User IDs and Passwords to newly-registered volunteers
    b) Volunteers do not gain their own experience with the system
    c) It takes the volunteer coordinator's time--this system was meant to help save time

## 2.9 Data Entry Demonstration: Client

**D**

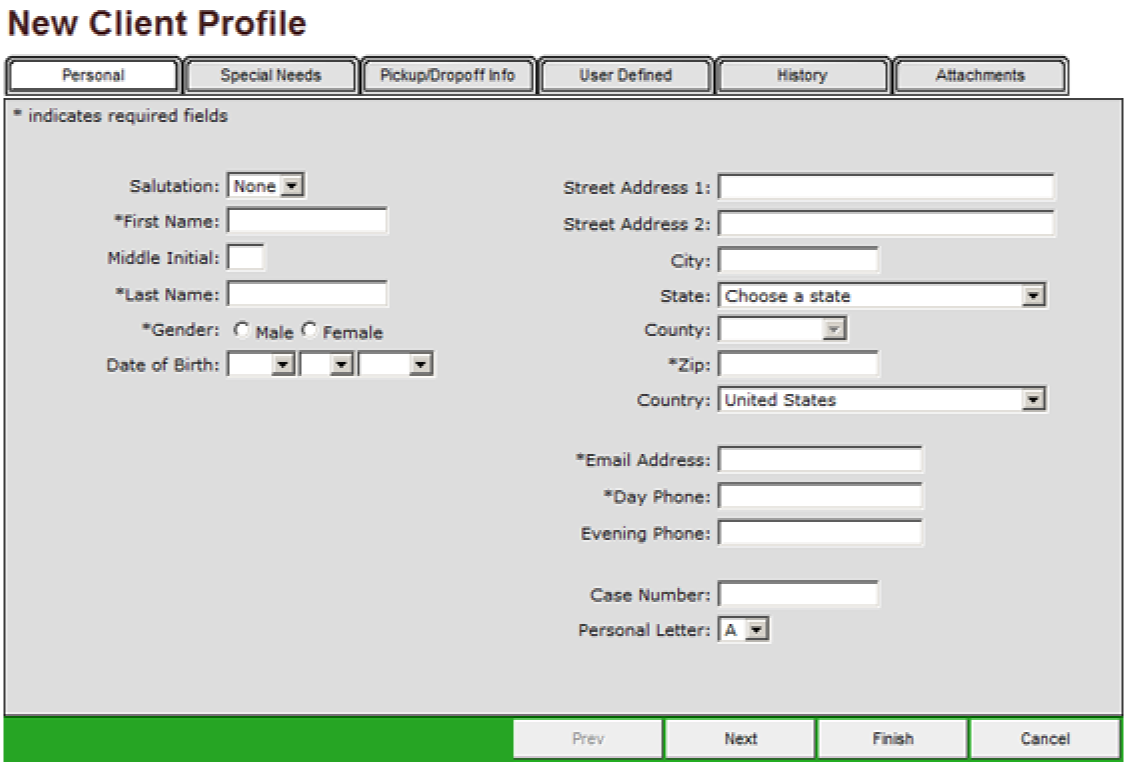
Demo

Clients are the individuals who will be receiving the volunteer service, as coordinated by you. Go to the "Clients" tab and click the "New" button. Or, try right-clicking on the grid and selecting "New."


Samaritan Demo Account : My Data
Volunteers
Opportunities
Organizations
Clients
New
Edit
Delete
Reports
Refer/Place
Show All
Grid Settings
--------------- Saved Grids ---------
1 to 4 of 4 Clients
Last Name
First Name
Case Number
Find

**Contact Info:** This tab contains critical information such as client name, address and all other contact information.

Notice the required fields are marked with an asterisk (*):



New Client Profile

Personal
Special Needs
Pickup/Dropoff Info
User Defined
History
Attachments

* indicates required fields

Salutation: None
*First Name:
Middle Initial:
*Last Name:
*Gender: ○ Male ○ Female
Date of Birth:

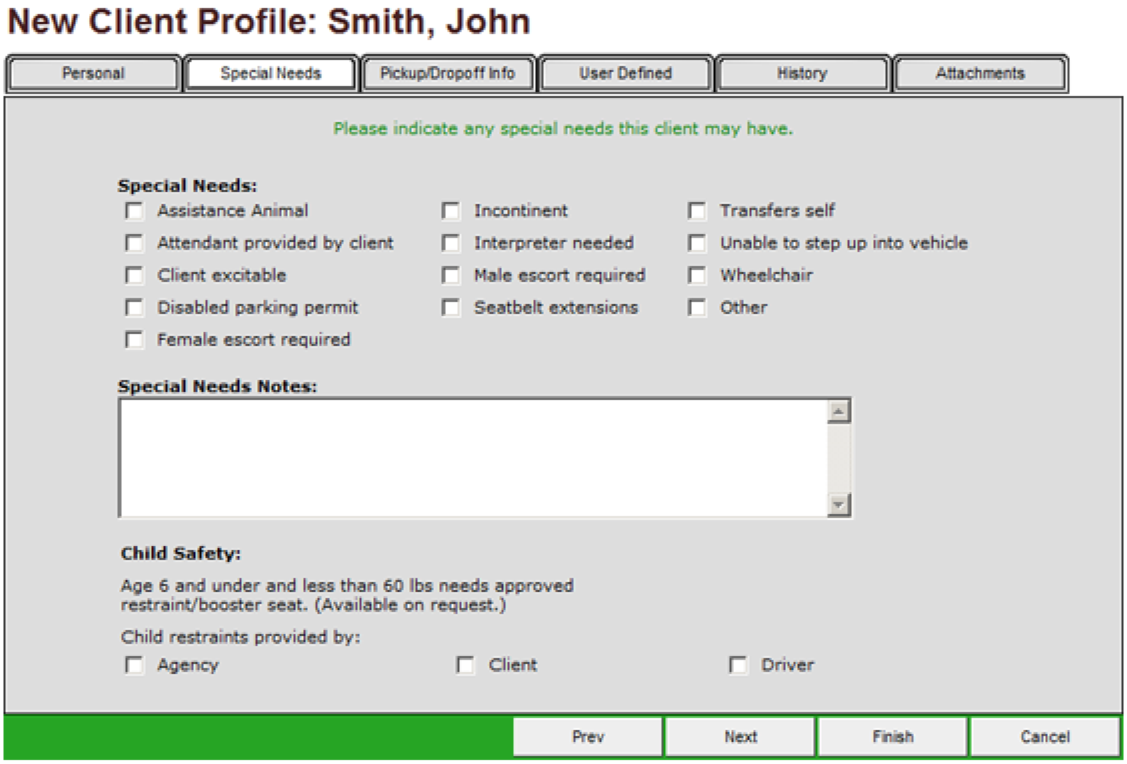
Street Address 1:
Street Address 2:
City:
State: Choose a state
County:
*Zip:
Country: United States

*Email Address:
*Day Phone:
Evening Phone:

Case Number:
Personal Letter: A

Prev
Next
Finish
Cancel

**Special Needs:** Designate any special needs the client may have the the volunteer will need to know.


Personal
Special Needs
Pickup/Dropoff Info
User Defined
History
Attachments
Prev
Next
Finish
Cancel

New Client Profile: Smith, John

Please indicate any special needs this client may have.

**Special Needs:**

☐ Assistance Animal
☐ Attendant provided by client
☐ Client excitable
☐ Disabled parking permit
☐ Female escort required
☐ Incontinent
☐ Interpreter needed
☐ Male escort required
☐ Seatbelt extensions
☐ Transfers self
☐ Unable to step up into vehicle
☐ Wheelchair
☐ Other

**Special Needs Notes:**

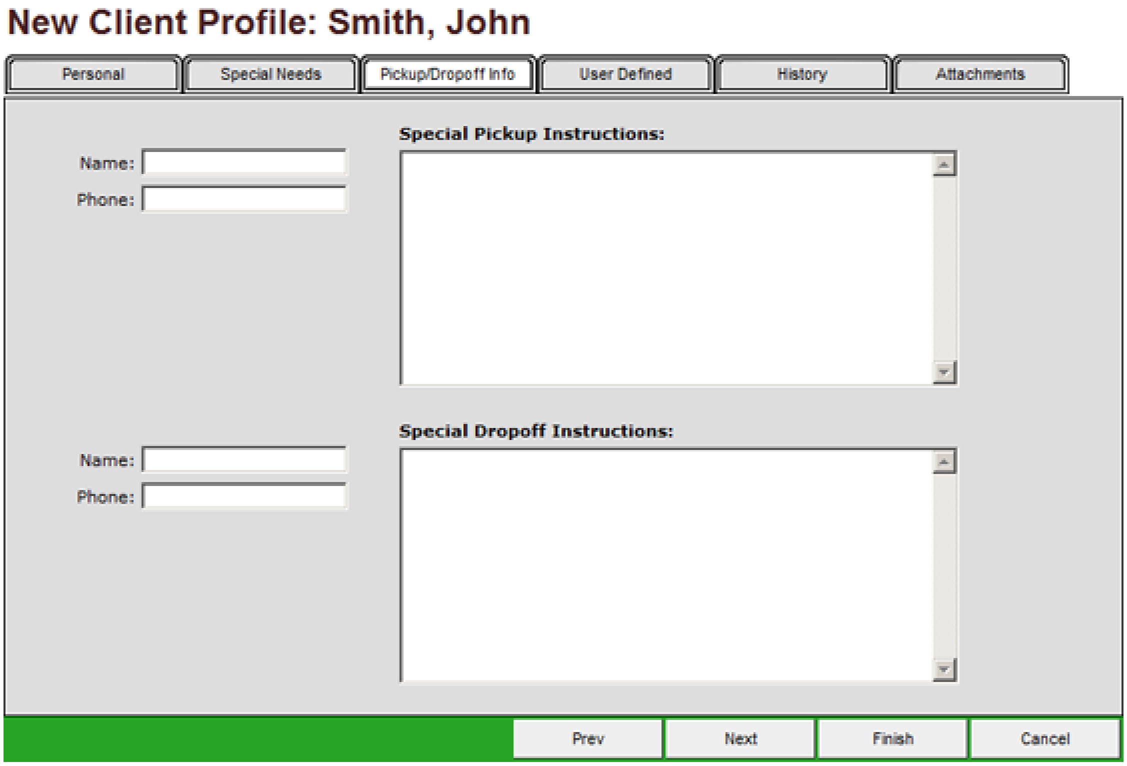
**Child Safety:**

Age 6 and under and less than 60 lbs needs approved restraint/booster seat. (Available on request.)

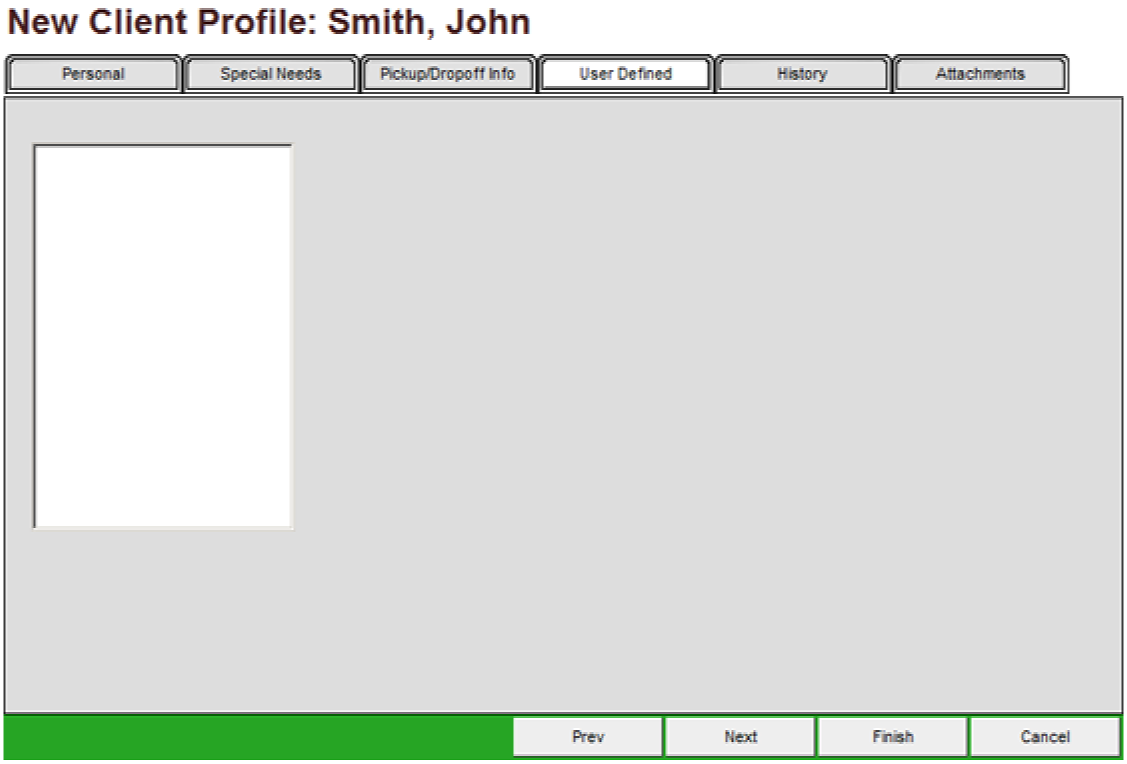
Child restraints provided by:

☐ Agency ☐ Client ☐ Driver

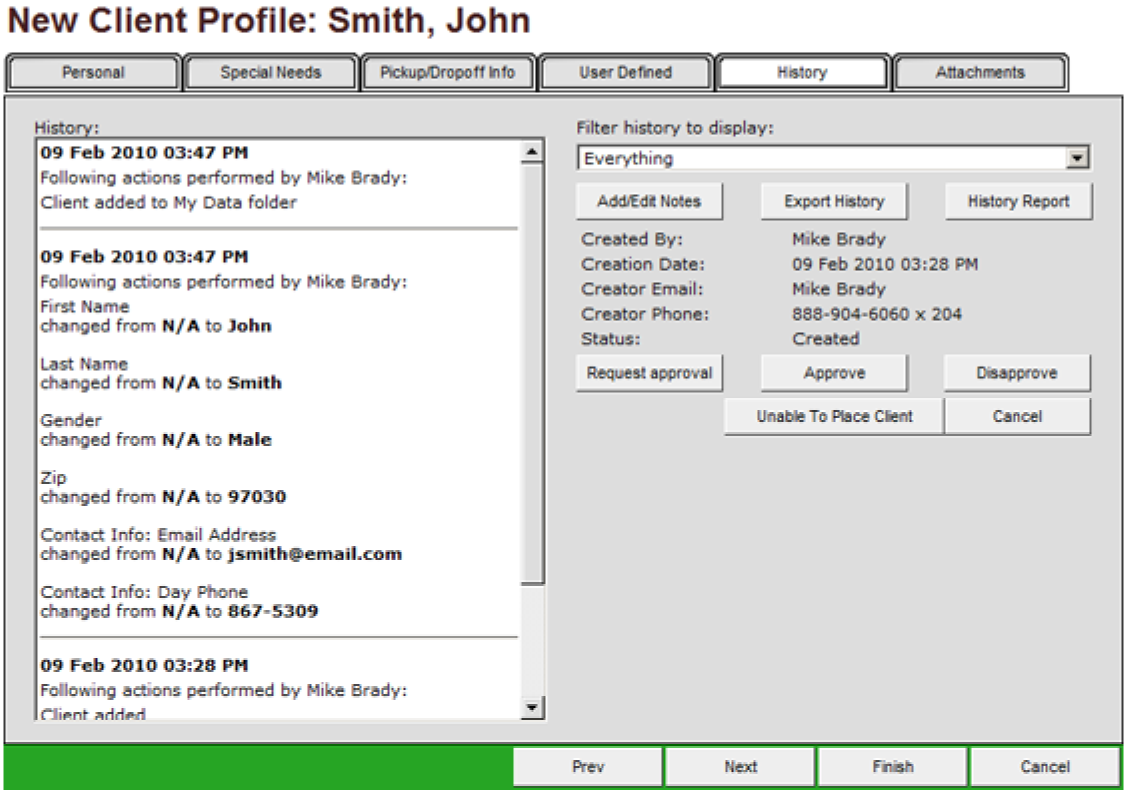
**Pickup/Dropoff Info:** This tab is used to designate the name and contact information of the person in charge of the client at the pickup location and the drop off location. This tab is used if the opportunity is to transport the client.


New Client Profile: Smith, John
Personal
Special Needs
Pickup/Dropoff Info
User Defined
History
Attachments
Name:
Phone:
Special Pickup Instructions:
Name:
Phone:
Special Dropoff Instructions:
Prev
Next
Finish
Cancel

**User Defined:** This tab is known as the User Defined tab, meaning that you, the user, define what fields appear here. Since this tab is generally administrated by program heads, not all eCoordinator users will have the ability to define their own fields. Training on this tab will be done on a case-by-case basis.


New Client Profile: Smith, John
Personal
Special Needs
Pickup/Dropoff Info
User Defined
History
Attachments
Prev
Next
Finish
Cancel

**History:** The History tab keeps an audit trail of all changes to the profile. This includes placements and referrals, changes to any of the data fields in the profile, and you can even add your own notes. You can generate a history report, and approve profiles from this tab as well. All entries are time and date stamped, and included the name or login of the individual who made the change.


Personal
Special Needs
Pickup/Dropoff Info
User Defined
History
Attachments
Add/Edit Notes
Export History
History Report
Request approval
Approve
Disapprove
Unable To Place Client
Cancel
Prev
Next
Finish
Cancel

New Client Profile: Smith, John

History:

**09 Feb 2010 03:47 PM**
Following actions performed by Mike Brady:
Client added to My Data folder

**09 Feb 2010 03:47 PM**
Following actions performed by Mike Brady:
First Name
changed from **N/A** to **John**

Last Name
changed from **N/A** to **Smith**

Gender
changed from **N/A** to **Male**

Zip
changed from **N/A** to **97030**

Contact Info: Email Address
changed from **N/A** to **jsmith@email.com**

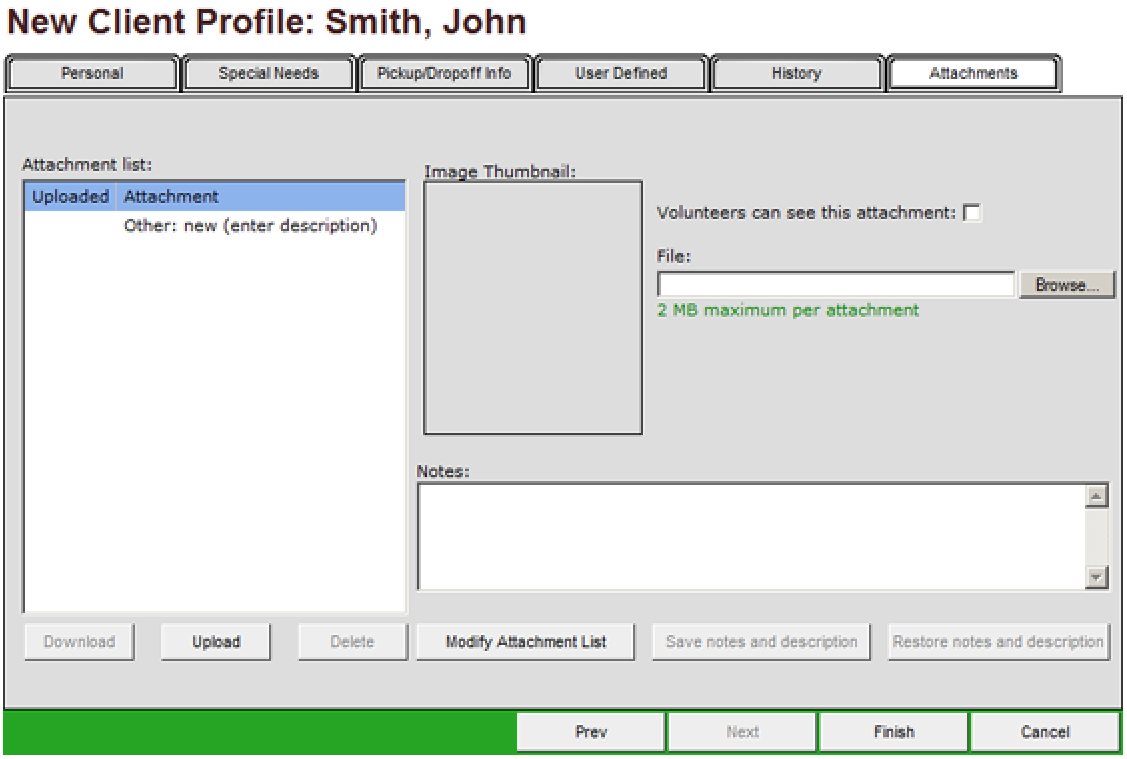
Contact Info: Day Phone
changed from **N/A** to **867-5309**

**09 Feb 2010 03:28 PM**
Following actions performed by Mike Brady:
Client added

Filter history to display: Everything

| | |
|---|---|
| Created By: | Mike Brady |
| Creation Date: | 09 Feb 2010 03:28 PM |
| Creator Email: | Mike Brady |
| Creator Phone: | 888-904-6060 x 204 |
| Status: | Created |

**Attachments:** eCoordinator has the ability to attach files to different profiles, such as images, documents, etc. Use this tab to attach files, as well as enter notes about the attachments. Note: there is a 2MiB maximum limit for each file.


New Client Profile: Smith, John
Personal
Special Needs
Pickup/Dropoff Info
User Defined
History
Attachments
Attachment list:
Image Thumbnail:
Notes:
Browse...
Download
Upload
Delete
Modify Attachment List
Save notes and description
Restore notes and description
Prev
Next
Finish
Cancel

| Uploaded | Attachment |
|---|---|
| | Other: new (enter description) |

Volunteers can see this attachment: ☐

File:

2 MB maximum per attachment

Please always make sure to click the "Finish" button when completing any profile.

## 2.10 Data Entry Practice: Client

**P** Practice

**Practice Instructions:**

1. Create a fictitious client
2. Client should be some special needs
3. Include pickup and drop off information

## 2.11 Data Entry Review: Client

**R** Review

**My Personal Review:**

1. When would you use the Pickup/Dropoff tab?

   ____________________________________

2. Would you ever approve clients before placing them with opportunities?

   YES NO

**Answer Key:**

1. Only when scheduling the volunteer to be transported.
2. Answers will vary depending on your organization.

## Part III

# Advanced Navigation

# 3 Advanced Navigation

I
Intro

There are three primary areas covered in this topic:

1. **Data Sorting** – enables you to sort your data according to specific columns
2. **Column Searches** – enables you to search for information in a specific column
3. **Folders** – How data is stored and organized within the system

These features allow you to customize the data that you see specific to your individual organization or opportunity needs.

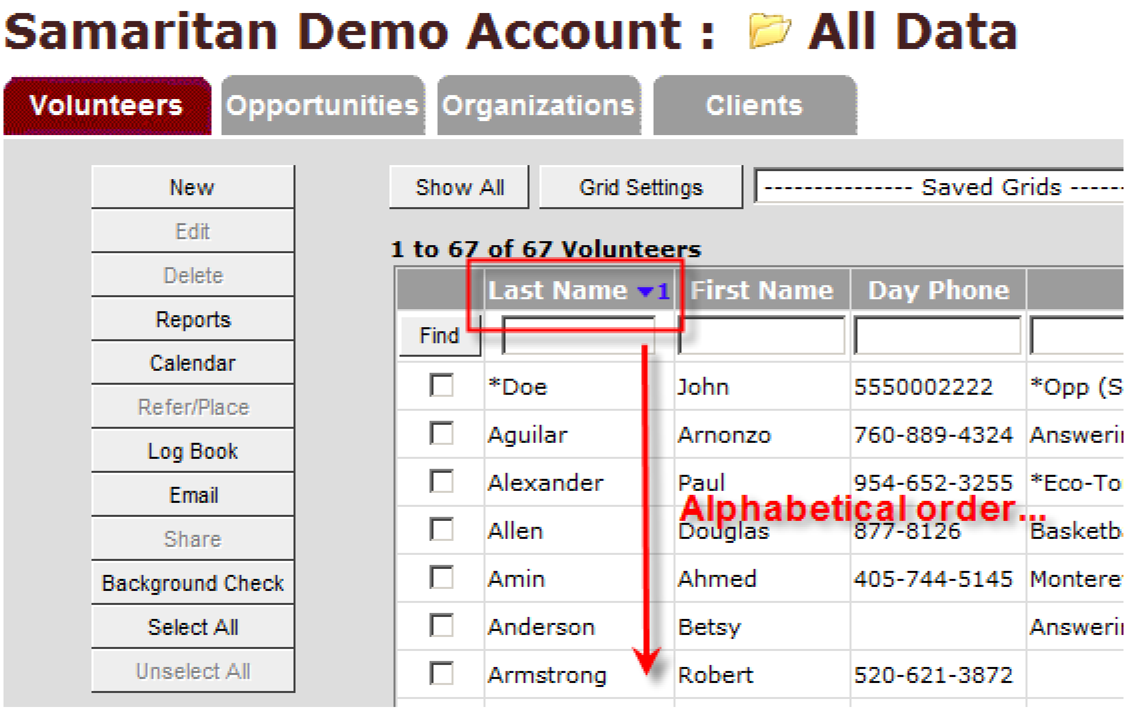
## 3.1 Data Sorting Demonstration

D
Demo

**Data Sorting**: Most columns can be sorted. If your mouse cursor turns into a hand when placed over the column header, this is an indication that you can sort your data by the information contained in that column by simply clicking the header. If the mouse cursor remains an arrow when placed over the column, that column does not support sorting.

The triangle in the column header indicates that the column has been selected to be sorted. When clicked, the arrow will reverse to indicate the order in which the information will be displayed (ascending vs. descending, i.e., alphabetical order or reverse-alphabetical order).

**Action:** To demonstrate this feature, move your mouse cursor to various columns to demonstrate sorting features.


Volunteers
Opportunities
Organizations
Clients
New
Edit
Delete
Reports
Calendar
Refer/Place
Log Book
Email
Share
Background Check
Select All
Unselect All
Show All
Grid Settings
--------------- Saved Grids -----
Find

Samaritan Demo Account : All Data

1 to 67 of 67 Volunteers

|  | Last Name ▼1 | First Name | Day Phone |  |
|---|---|---|---|---|
| ☐ | *Doe | John | 5550002222 | *Opp (S |
| ☐ | Aguilar | Arnonzo | 760-889-4324 | Answeri |
| ☐ | Alexander | Paul | 954-652-3255 | *Eco-To |
| ☐ | Allen | Douglas | 877-8126 | Basketb |
| ☐ | Amin | Ahmed | 405-744-5145 | Montere |
| ☐ | Anderson | Betsy |  | Answeri |
| ☐ | Armstrong | Robert | 520-621-3872 |  |

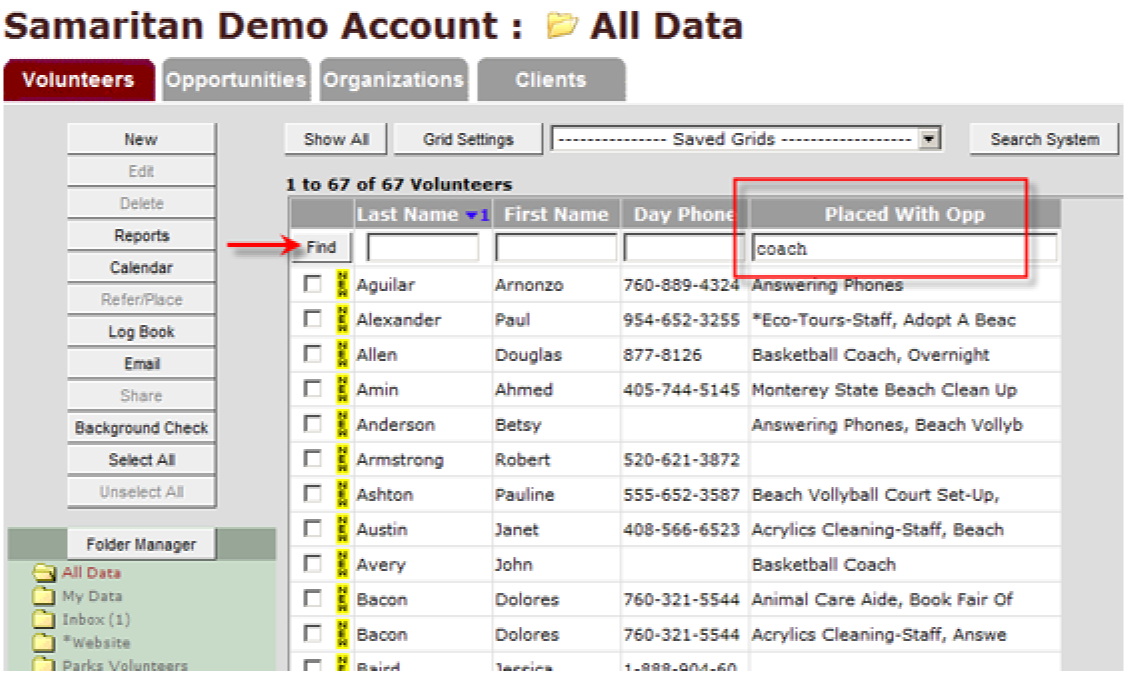
Alphabetical order...

## 3.2 Column Searches Demonstration

**Column Searches:** Each column has a search box which allows you to search for specific criteria within that column, for example, you can search for which opportunities volunteers have self-referred themselves to in the “Placed With Opp” column, or use numerical ranges in certain columns, say to search for volunteers with availability in the evening hours. To get results press the “Enter” key on your keyboard or the “Find” button on the screen.

**Action:** To demonstrate this feature, enter appropriate information into at least two columns and click "Find."

**Before:**

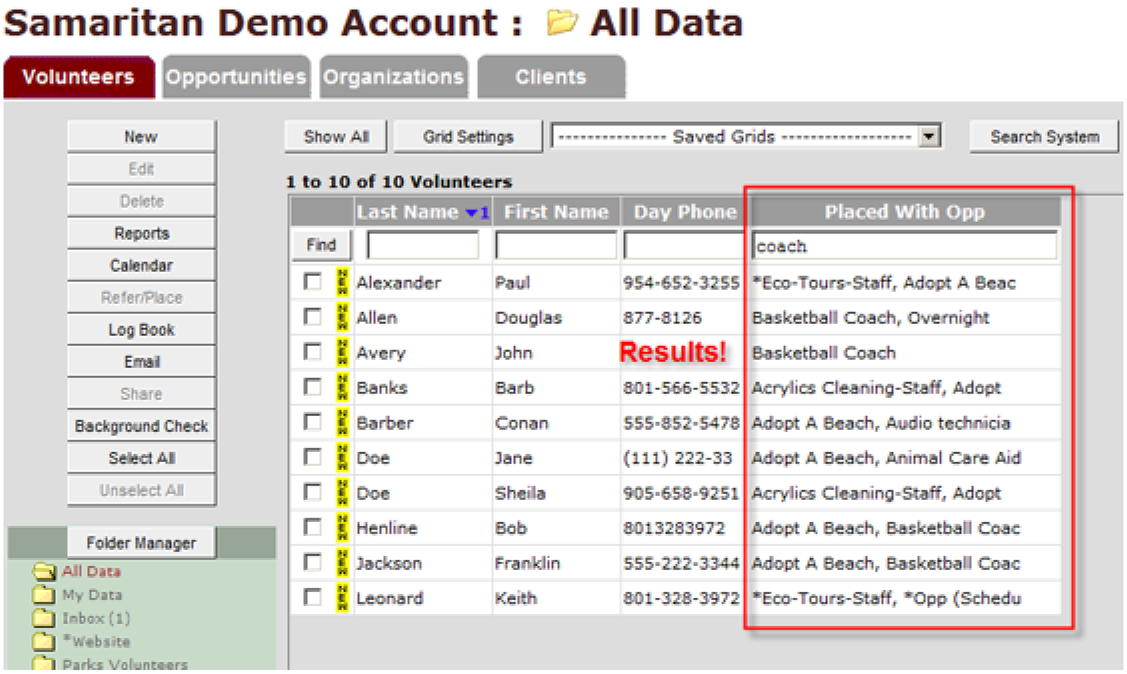

Volunteers
Opportunities
Organizations
Clients
New
Edit
Delete
Reports
Calendar
Refer/Place
Log Book
Email
Share
Background Check
Select All
Unselect All
Folder Manager
All Data
My Data
Inbox (1)
*Website
Parks Volunteers
Show All
Grid Settings
--------------- Saved Grids ------------------
Search System
Find

Samaritan Demo Account : All Data

1 to 67 of 67 Volunteers

| | Last Name 1 | First Name | Day Phone | Placed With Opp |
|---|---|---|---|---|
| Find | | | | coach |
| ☐ | Aguilar | Arnonzo | 760-889-4324 | Answering Phones |
| ☐ | Alexander | Paul | 954-652-3255 | *Eco-Tours-Staff, Adopt A Beac |
| ☐ | Allen | Douglas | 877-8126 | Basketball Coach, Overnight |
| ☐ | Amin | Ahmed | 405-744-5145 | Monterey State Beach Clean Up |
| ☐ | Anderson | Betsy | | Answering Phones, Beach Vollyb |
| ☐ | Armstrong | Robert | 520-621-3872 | |
| ☐ | Ashton | Pauline | 555-652-3587 | Beach Vollyball Court Set-Up, |
| ☐ | Austin | Janet | 408-566-6523 | Acrylics Cleaning-Staff, Beach |
| ☐ | Avery | John | | Basketball Coach |
| ☐ | Bacon | Dolores | 760-321-5544 | Animal Care Aide, Book Fair Of |
| ☐ | Bacon | Dolores | 760-321-5544 | Acrylics Cleaning-Staff, Answe |
| ☐ | Baird | Jessica | 1-888-904-60 | |

**After:**


Volunteers
Opportunities
Organizations
Clients
New
Edit
Delete
Reports
Calendar
Refer/Place
Log Book
Email
Share
Background Check
Select All
Unselect All
Folder Manager
All Data
My Data
Inbox (1)
*Website
Parks Volunteers
Show All
Grid Settings
--------------- Saved Grids ------------------
Search System
Find
Results!

Samaritan Demo Account : All Data

1 to 10 of 10 Volunteers

| | Last Name 1 | First Name | Day Phone | Placed With Opp |
|---|---|---|---|---|
| Find | | | | coach |
| ☐ | Alexander | Paul | 954-652-3255 | *Eco-Tours-Staff, Adopt A Beac |
| ☐ | Allen | Douglas | 877-8126 | Basketball Coach, Overnight |
| ☐ | Avery | John | | Basketball Coach |
| ☐ | Banks | Barb | 801-566-5532 | Acrylics Cleaning-Staff, Adopt |
| ☐ | Barber | Conan | 555-852-5478 | Adopt A Beach, Audio technicia |
| ☐ | Doe | Jane | (111) 222-33 | Adopt A Beach, Animal Care Aid |
| ☐ | Doe | Sheila | 905-658-9251 | Acrylics Cleaning-Staff, Adopt |
| ☐ | Henline | Bob | 8013283972 | Adopt A Beach, Basketball Coac |
| ☐ | Jackson | Franklin | 555-222-3344 | Adopt A Beach, Basketball Coac |
| ☐ | Leonard | Keith | 801-328-3972 | *Eco-Tours-Staff, *Opp (Schedu |

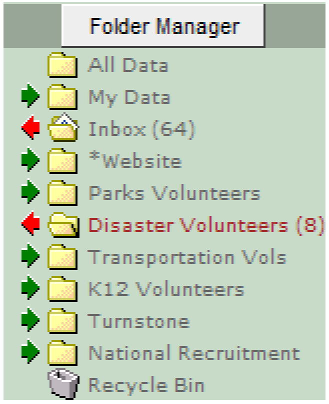
You can enter search criteria into multiple columns and get combined results.

## 3.3 Folders Demonstration

**Folders:** Each folder in the "Folder Manager" on the left-hand side contains the data that will be displayed in the visible grid. To select a folder and view its data, click on its name or on the folder icon. The label of the folder that you are currently viewing will appear in red, and folder icon will change to an image of an open folder. To move data in and out of folders, follow these instructions:

1. Select the record(s) that you wish to move. A red, left-facing arrow will appear next to the folder icon, indicating that you may move the profile out of that folder.

   Green, right-facing arrows will appear next to folders into which you may move that record.



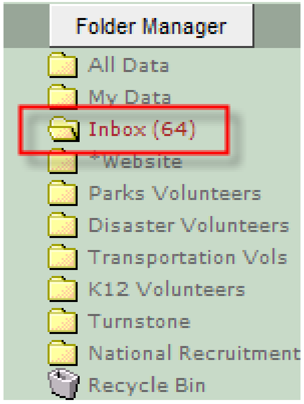
2. To move the record(s), simply click on the arrow corresponding to the folder into which you wish to move the record(s). Make sure to click on the *arrows*, and not the folder icon, as that action will only open that folder, not move the record.

**More about using folders:**

- The “All Data” folder is a view that will display all available data existing in all folders.
- Profiles can exist in multiple folders at the same time.
- Using the “Folder Manager” button, you can create, edit, or delete specific folders.
- You can create a new folder for specific organizations, opportunities, volunteers, or clients. Once you have created a new folder, you can copy client, volunteer, opportunity or organization data into that folder.
- Finally, the very last of the folders is the “Recycle Bin.” Records that you move into it are stored as with any other folder. However, to move records out of the Recycle Bin (restore them) you must open it, select the record(s) and click the “Restore” button. If you click “Delete” from the Recycle Bin the, record will be permanently removed from your eCoordinator system.

**Using Folders to Interact with eRecruiter:**

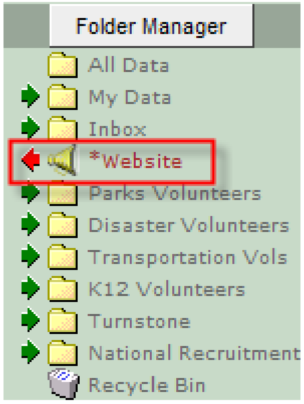
**Receiving from eRecruiter:** New volunteer registrants from eRecruiter (and organization or opportunity profiles from Organization eRecruiter) will automatically appear in your Inbox.


Folder Manager
All Data
My Data
Inbox (64)
*Website
Parks Volunteers
Disaster Volunteers
Transportation Vols
K12 Volunteers
Turnstone
National Recruitment
Recycle Bin

The number within the parentheses (xxx) does NOT indicate how many profiles are in that folder--that number represents how many NEW profiles are in that folder.

**Publishing Opportunities**: If you want to publish a service opportunity to eRecruiter, go to the opportunities tab, select the opportunity(ies), and move them into the “*Website” folder.  You will see a megaphone icon next to it as a reminder that you are broadcasting the opportunities in that folder.

Note: "*Website" is the name of the broadcasting folder used in the screen shots. The folder name in your system may be different--the key indicator is the megaphone icon.


Folder Manager
All Data
My Data
Inbox
*Website
Parks Volunteers
Disaster Volunteers
Transportation Vols
K12 Volunteers
Turnstone
National Recruitment
Recycle Bin

To remove an opportunity from the website, click the *Website folder in Folder Manager. Select the opportunity(ies) you wish to remove and click the red, left-facing arrow.

## 3.4 Advanced Navigation Practice

P

Practice

**Practice Instructions:**

1. Use a column search to find the volunteer profile that you created
2. Move that volunteer profile into a different folder
3. Publish an opportunity

## 3.5 Advanced Navigation Review

**My Personal Review:**

1. How do you sort information by a specific column?

   ____________________________________

2. How do you change that sort from ascending to descending order, and back?

   ____________________________________

3. Where is new volunteer data initially stored?

   ____________________________________

4. Would it be helpful if you could rearrange, pre-search and pre-sort columns to support your daily tasks?

   YES NO

**Answer Key:**

1. Click the column header to move the blue triangle from one column to another (where possible)
2. Click the blue arrow to change its direction (down to up or up to down)
3. Inbox
4. Yes, and this leads to the next topics, Named Grids and Named Searches

## Part IV

# Named Searches

# 4 Named Searches

I

Intro

Named Searches are used to help you find records quickly and easily. They are similar to and supportive of Named Grids, and you access them in the same manner. Like Named Grids, they are setup using separate screens which you use to build criteria and create a name for the results. However, unlike Named Grids, you can search for “null” fields which are things like “Volunteers with no email address.” This cannot be done with grids because you cannot type “nothing” into a column search, as the Named Grids only search for what you actually type. You can attach a Named Search to a Named Grid. This is done on the Named Grid setup screen in the lower-right corner, as previously discussed.

Named Searches are critical to referring and placing volunteers. There are pull-down menus on those screens which allow you to select a Named Search to help you find the right volunteers for each opportunity (or the right opportunities for a volunteer). Finally, Named Searches are also very helpful with reports. Many of the report setup screens include a drop down menu for searches so that you can narrow the records you are reporting on. As you build Named Searches, please keep these 4 principle uses in mind:

1. You are able to search for “null” data (like volunteers without email)
2. You can  enhance Named Grids
3. Named Grids support the Refer & Place function
4. Named Grids help in narrowing the data used in reports

## 4.1 Named Searches Demonstration

D

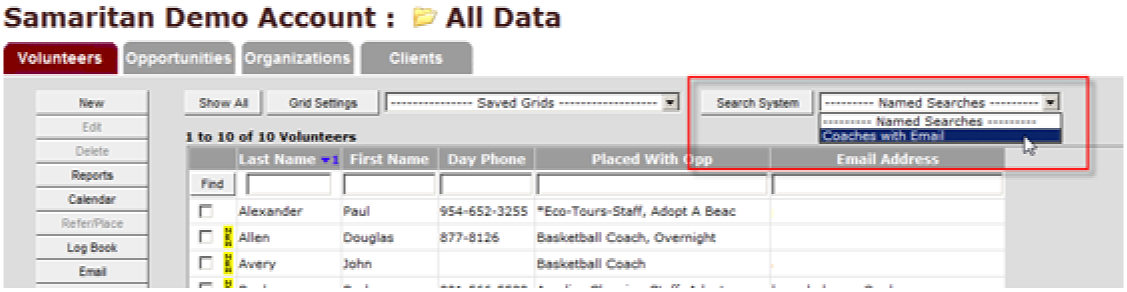
Demo

To build a Named Search follow these instructions.

**Action:** Demonstrate this function by following the instructions below.

**Step #1:** Go to the grid representing the data you want to search (i.e., clients, volunteers, opportunities, or organizations).

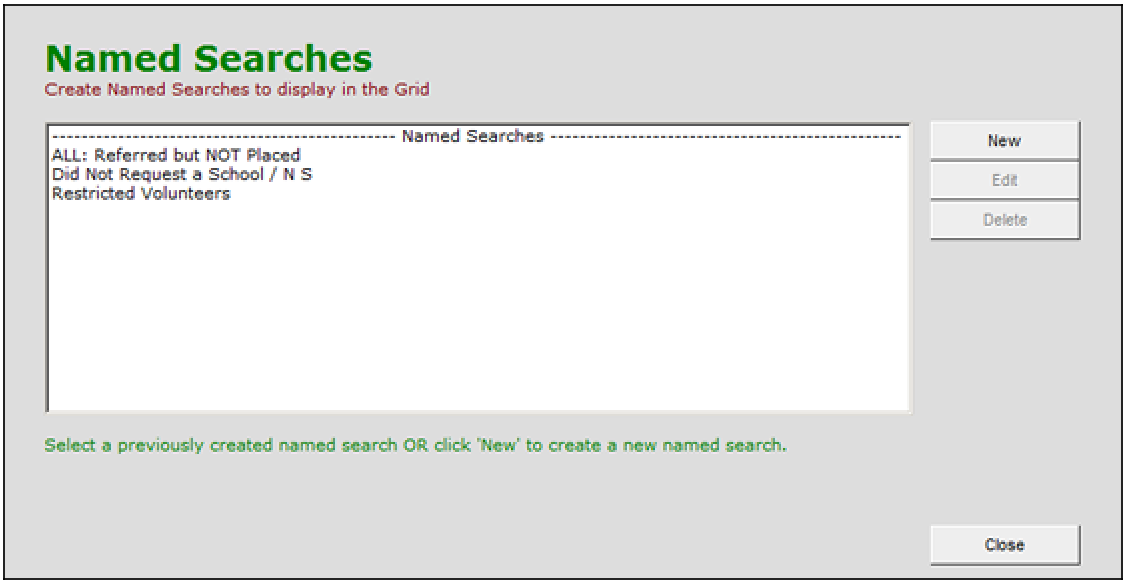
**Step #2:** Click the Search System button on main grid.


Samaritan Demo Account : All Data
Volunteers
Opportunities
Organizations
Clients
New
Edit
Delete
Reports
Calendar
Refer/Place
Log Book
Email
Show All
Grid Settings
--------------- Saved Grids ------------------
Search System
--------- Named Searches ---------
--------- Named Searches ---------
Coaches with Email
Find

1 to 10 of 10 Volunteers

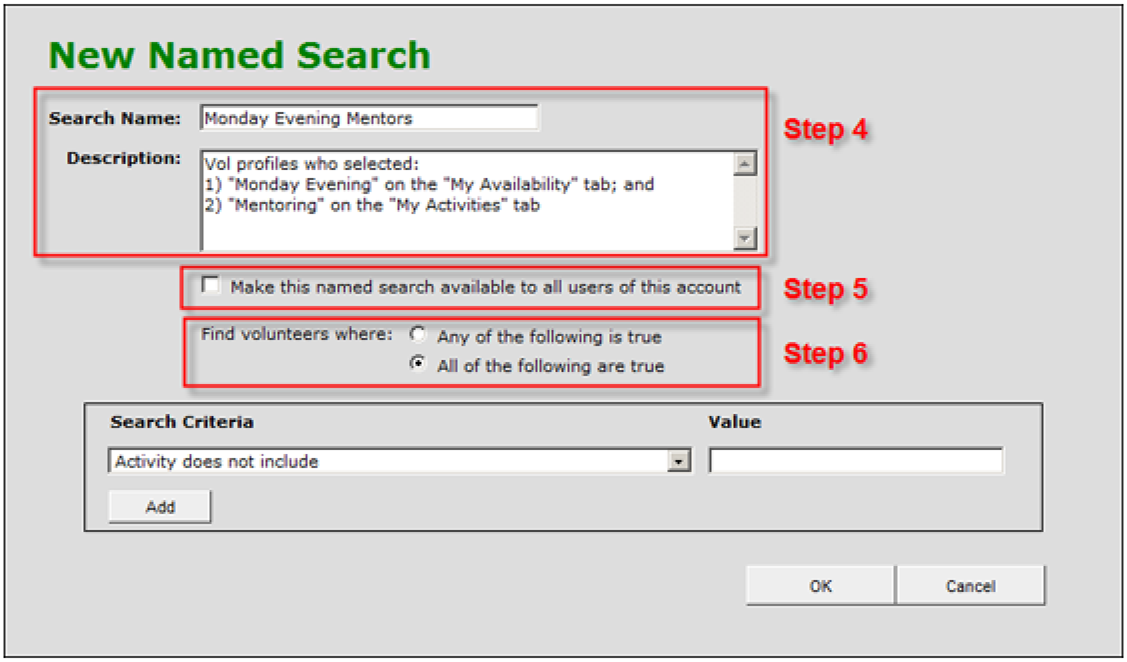
| Last Name | First Name | Day Phone | Placed With Opp | Email Address |
|---|---|---|---|---|
| Alexander | Paul | 954-652-3255 | *Eco-Tours-Staff, Adopt A Beac | |
| Allen | Douglas | 877-8126 | Basketball Coach, Overnight | |
| Avery | John | | Basketball Coach | |

**Step #3:** Click “New” to create a new search.


Named Searches
Create Named Searches to display in the Grid
---------------------------------------- Named Searches ----------------------------------------
ALL: Referred but NOT Placed
Did Not Request a School / N S
Restricted Volunteers
New
Edit
Delete
Close

Select a previously created named search OR click 'New' to create a new named search.

**Step #4:** Name and describe your search. This search title will appear in the pull-down menu for “Named Searches” on the main grid screen for the clients, volunteers, opportunities or organizations you are working with. You run a search by selecting its name from the pull-down menu. Give your search a name that logically describes what you are trying to do. However, the optional "Description" field is provided to give further explanation.



Search Name: Monday Evening Mentors

Description: Vol profiles who selected:
1) "Monday Evening" on the "My Availability" tab; and
2) "Mentoring" on the "My Activities" tab

☐ Make this named search available to all users of this account

Find volunteers where: ○ Any of the following is true
● All of the following are true

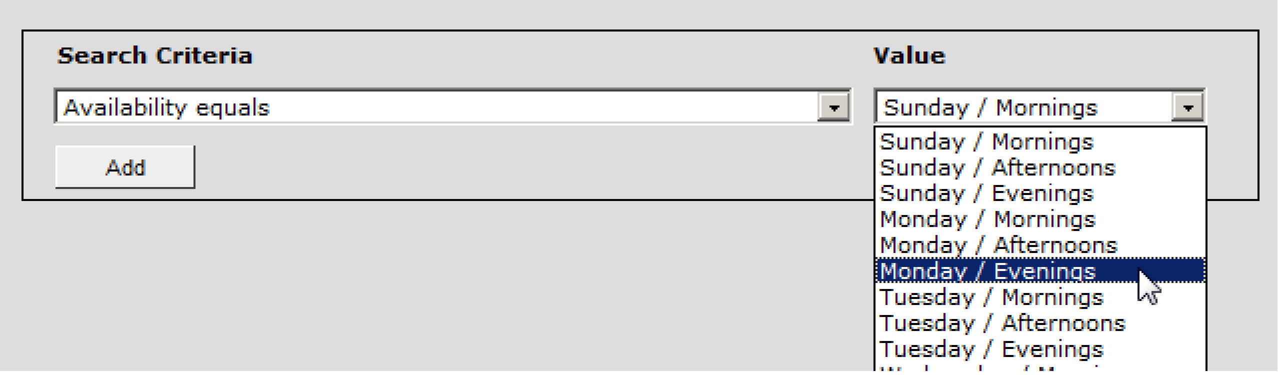
Search Criteria: Activity does not include

**Step #5:** Will this Named Search be shared? If you want other users of your eCoordinator account to see your search, then select this option. If you are simply building a search to use a single time or purpose, then you might keep it for yourself only.

**Step #6:** Decide how you want your search criteria to be "connected." Named Searches can include up to five search criteria. For example, you may want to search for all volunteers who would like to help out with tutoring *and* also have availability on Tuesdays during school. In this case, you would build two different criteria statements using the process shown hereafter. However, you must tell the system that you want to "Find volunteers where ALL of the following [statements] are true."

**Step #7:** Select your criteria. Keeping with our sample of finding volunteers who are interested in tutoring, let's show you how this would be done. There are two columns of information you will be working with. These are the "Search Criteria" and "Value" columns you see here.

Our goal is to select the right kinds of things so that you get the results you want. We will start by selecting the criteria. Each field in the volunteer application form will be listed when you select the drop down arrow. In most cases, each field will have multiple options for search criteria. These represent different ways of connecting the criteria together. Each of these are described below.

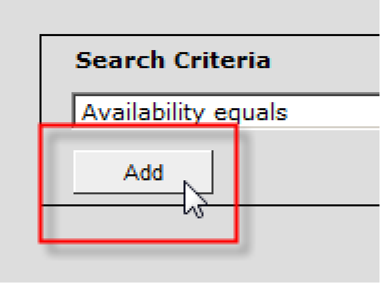

Search Criteria
Availability equals
Add
Value
Sunday / Mornings
Sunday / Mornings
Sunday / Afternoons
Sunday / Evenings
Monday / Mornings
Monday / Afternoons
Monday / Evenings
Tuesday / Mornings
Tuesday / Afternoons
Tuesday / Evenings

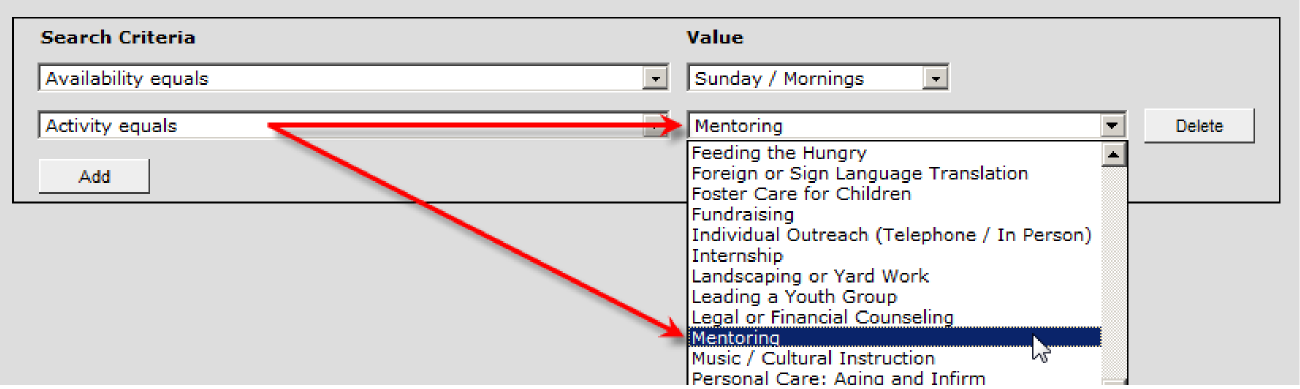
- **Equals:** The value must be exactly what you select or type here before you get search results.
- **Includes:** The value will include whatever you type, including partial words, as long as the *criteria* exists in the database the way you type it.
- **Does Not Include:** Search results will display profiles that do not include the text you type in as the value.
- **Is Empty:** This is how you identify fields that have *not* been filled out in the profile.
- **Is Not Empty:** Use this to identify fields that *have* been filled out in the profile.

**Step #8:** Select your value. The value field is dependent on the criteria statement you selected in Step #7. Most "equals" statements will bring up a drop-down list of exact options that exist in the database. "(Does Not) Include" criteria will allow you to type what you want the system to include when your search is run. "Is Empty" and "Is Not Empty" options will not bring up any value option because none is needed.

In our example, once the "How I would like to help includes" criterion has been selected, simply type "tutoring" in the value field that automatically appears.

**Step #9:** Add additional criteria as needed. Use the "Add" button to launch a new criterion and repeat steps 7-8 if needed. Up to 5 criteria can be created and combined by either using an "All" connector or an "Any" connector (see step #6).


Search Criteria
Availability equals
Add


Search Criteria
Value
Delete
Add

Availability equals — Sunday / Mornings

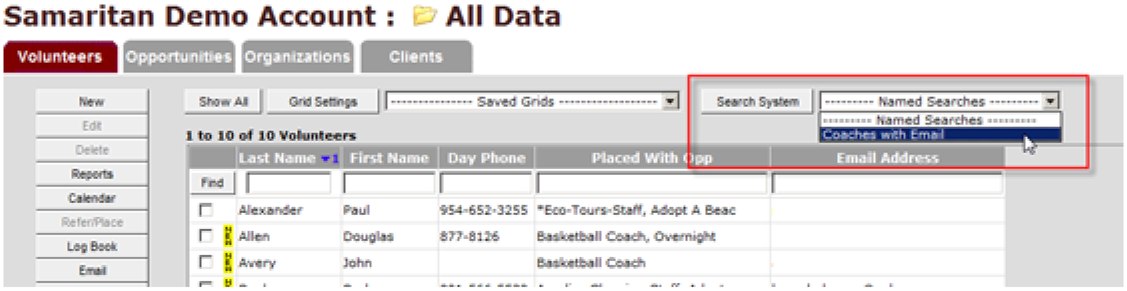
Activity equals — Mentoring

Feeding the Hungry
Foreign or Sign Language Translation
Foster Care for Children
Fundraising
Individual Outreach (Telephone / In Person)
Internship
Landscaping or Yard Work
Leading a Youth Group
Legal or Financial Counseling
Mentoring
Music / Cultural Instruction
Personal Care: Aging and Infirm

**Step #10:** Save your search. Click the “OK” button at the bottom.

**Step #11:** Verify that your new search appears in the “Named Searches” screen. You may then either close the window, create a new search, or edit an existing search. Note that the search you have created does not actually run until selected from the main grid.

**Step #12:** Run your search. Do this by going to the main grid you were working with (clients, volunteers, opportunities, organizations) and select your search from the drop down menu there.


Samaritan Demo Account : All Data
Volunteers
Opportunities
Organizations
Clients
New
Edit
Delete
Reports
Calendar
Refer/Place
Log Book
Email
Show All
Grid Settings
--------------- Saved Grids ------------------
Search System
--------- Named Searches ---------
--------- Named Searches ---------
Coaches with Email
Find

1 to 10 of 10 Volunteers

| Last Name | First Name | Day Phone | Placed With Opp | Email Address |
|---|---|---|---|---|
| Alexander | Paul | 954-652-3255 | *Eco-Tours-Staff, Adopt A Beac | |
| Allen | Douglas | 877-8126 | Basketball Coach, Overnight | |
| Avery | John | | Basketball Coach | |

## 4.2 Named Searches Practice

**P**
**Practice**

Please complete your Named Search practice by doing the following.

**Named Grids Practice Steps:**

1. Select the “Volunteers” tab and click “Search System”
2. Select “New” and then enter a name and description for whatever you are seeking. Be specific!
3. Select “Make this search available to other users of this account” (so we can all see what you did)

4. Connect your upcoming criteria statements with an “All” connector
5. Build two statements that search for different attributes like interests, activities, availability, etc. Show these to your instructor before moving on.
6. Build a third statement that precludes volunteers who do not have email addresses
7. Save and run your search. Note: You may not get results.

## 4.3 Named Searches Review

Please answer the following questions.

**My Personal Review:**

1. When you create a Named Search, it appears in the drop-down menu on the main grid you currently have open.

   TRUE FALSE

2. When you create a Named Grid it is automatically run when you click the “OK” button.

   TRUE FALSE

3. When you use the “All” connector, the system will bring up results where any of the statements you created are "true."

   TRUE FALSE

4. If you use the “Includes” option when building your statement criteria, what will happen?

   ________________________________________

   ________________________________________

5. How would you exclude all volunteers who have not expressed *interest* in doing *anything* from your search results?

   ________________________________________

   ________________________________________

6. When using an “Includes” criteria in your statement, you can type anything you want

into the value field and the database will find it.

TRUE FALSE

**Answer Key:**

1. TRUE
2. FALSE; Clicking "OK" will save the search. To run the search, select it from the drop-down menu from the appropriate grid.
3. FALSE; The search results will display results of profiles that met ALL search criteria.
4. The search results will display results of profiles that contain the text of your search criteria.
5. "How I would like to help" is EMPTY
6. FALSE; Users must make sure that what they type in the Value field is a part of the pre-defined fields on the profile

## Part V

# Named Grids

# 5 Named Grids

Named grids will help you quickly get to the data you need and view it in the order that makes sense. They combine all of the navigation elements we have discussed so far, including sorting, column searches and folders. You can also narrow the results you see in grids by adding a pre-made search when you are setting up a new grid.

Grids can be created for clients, volunteers, opportunities, organizations, schedule slots and log books. In each case, you will be able to select from all of the different data elements in the profile and add them to existing or new grids. The objective is to help you do your day-to-day tasks such as:

- Viewing new registrants
- Reviewing new self-referrals for opportunity placements
- Viewing all volunteers who are interested in a certain activity
- Creating reports

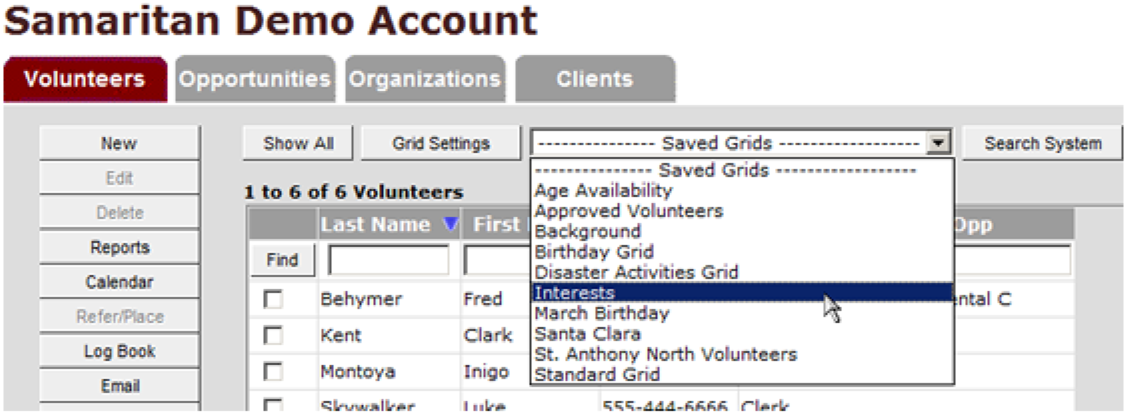
**Discussion:** What are some other possible day-to-day uses for named grids?

## 5.1 Named Grids Demonstration Part 1

We will begin by demonstrating how to access previously made grids, then move on to the process of creating new ones.

**Accessing Standard Grids:**

To access previously created grids, select them from the pull down menu in each of the main screens.


Samaritan Demo Account
Volunteers
Opportunities
Organizations
Clients
New
Edit
Delete
Reports
Calendar
Refer/Place
Log Book
Email
Show All
Grid Settings
-------------- Saved Grids ------------------
Search System
-------------- Saved Grids ------------------
Age Availability
Approved Volunteers
Background
Birthday Grid
Disaster Activities Grid
Interests
March Birthday
Santa Clara
St. Anthony North Volunteers
Standard Grid
Find
Last Name
First
Opp

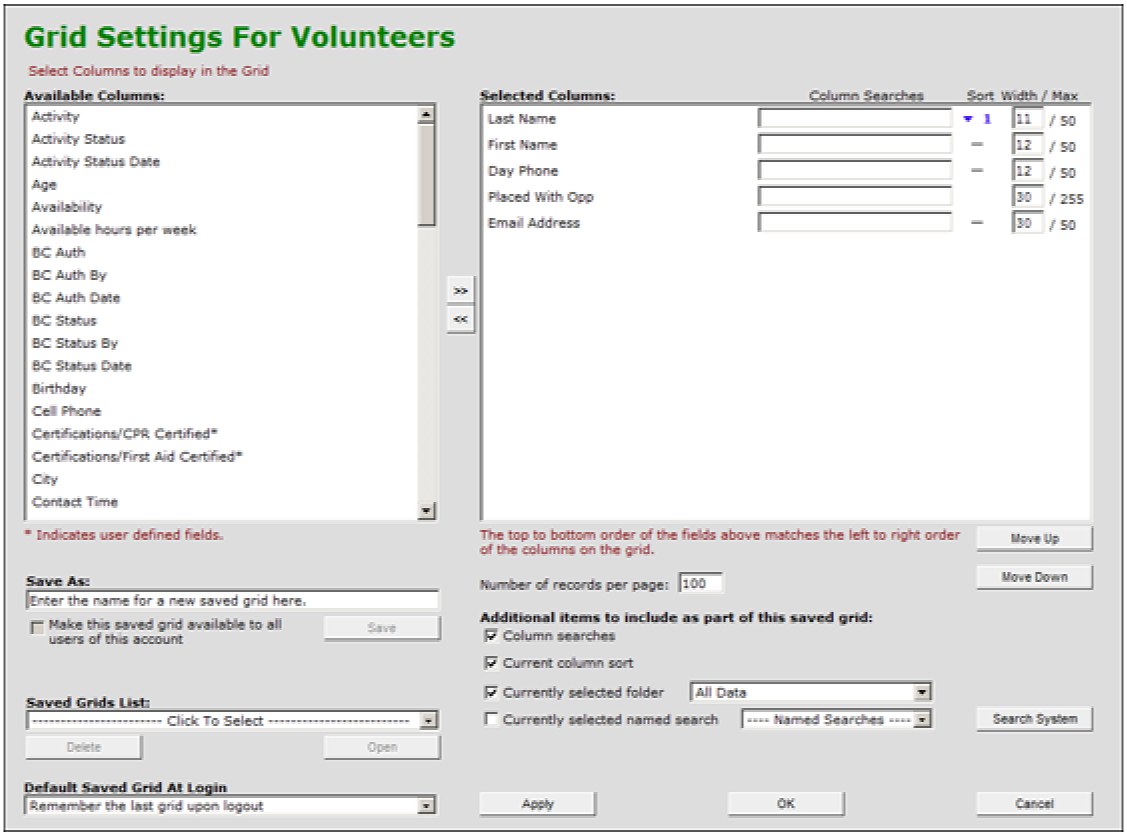
1 to 6 of 6 Volunteers

| | Last Name | First | | |
|---|---|---|---|---|
| ☐ | Behymer | Fred | | ntal C |
| ☐ | Kent | Clark | | |
| ☐ | Montoya | Inigo | | |
| ☐ | Skywalker | Luke | 555-444-6666 | Clerk |

By selecting the name of the grid, it will automatically "run" and display whatever data was programmed into the grid.

**Creating New Grids:**

**Step #1:** Click the "Grid Settings" button. You will see:


Grid Settings For Volunteers
Select Columns to display in the Grid
Available Columns:
Activity
Activity Status
Activity Status Date
Age
Availability
Available hours per week
BC Auth
BC Auth By
BC Auth Date
BC Status
BC Status By
BC Status Date
Birthday
Cell Phone
Certifications/CPR Certified*
Certifications/First Aid Certified*
City
Contact Time
* Indicates user defined fields.
>>
<<
Move Up
Move Down
Save As:
Enter the name for a new saved grid here.
Save
Saved Grids List:
------------------------ Click To Select ------------------------
Delete
Open
Default Saved Grid At Login
Remember the last grid upon logout
Search System
Apply
OK
Cancel

Selected Columns:

| | Column Searches | Sort | Width / Max |
|---|---|---|---|
| Last Name | | ▼ 1 | 11 / 50 |
| First Name | | – | 12 / 50 |
| Day Phone | | – | 12 / 50 |
| Placed With Opp | | | 30 / 255 |
| Email Address | | – | 30 / 50 |

The top to bottom order of the fields above matches the left to right order of the columns on the grid.

Number of records per page: 100

☐ Make this saved grid available to all users of this account

Additional items to include as part of this saved grid:

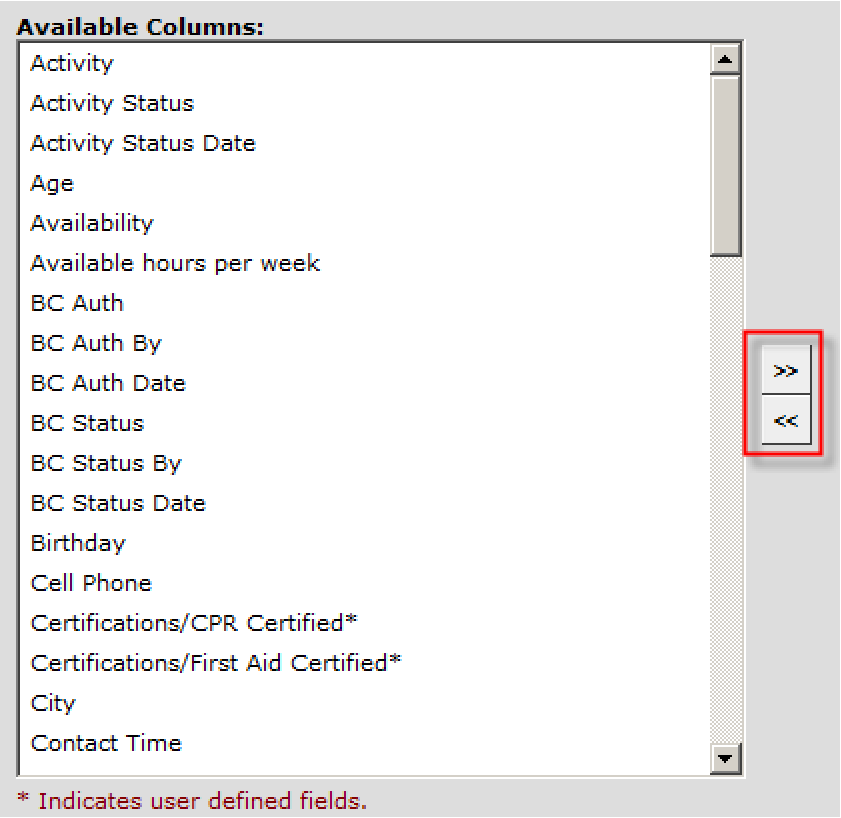
☑ Column searches

☑ Current column sort

☑ Currently selected folder: All Data

☐ Currently selected named search: ---- Named Searches ----

**Step #2:** Select which columns you want to have in your new grid. Columns are listed down the left side under the label "Available Columns." To add columns, select the columns you wish to move, then click the arrows in between the left and right panels. You may also double-click on column names to move them from one view to the other. You can select multiple columns simultaneously by holding down the “Shift” key while selecting the top and bottom labels in the left side list. You can also use the “Ctrl” key to select multiple individual column labels.



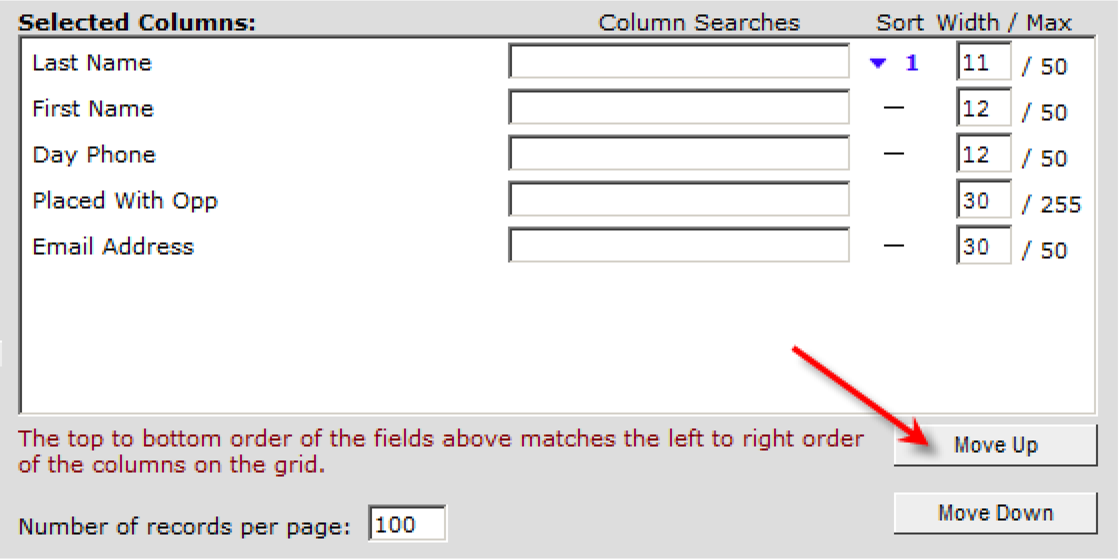
**Available Columns:**

- Activity
- Activity Status
- Activity Status Date
- Age
- Availability
- Available hours per week
- BC Auth
- BC Auth By
- BC Auth Date
- BC Status
- BC Status By
- BC Status Date
- Birthday
- Cell Phone
- Certifications/CPR Certified*
- Certifications/First Aid Certified*
- City
- Contact Time

* Indicates user defined fields.

**Action:** Demonstrate both the "Shift" and "Ctrl" multi-record selection methods.

**Step #3:** Order the columns the way you want them viewed. Select a column label in the right side window and use the “Move Up” and “Move Down” buttons to change the column order. Columns will appear in the order they are listed, with the topmost column being on the far left in the main grid, with columns moving right as the list goes down.



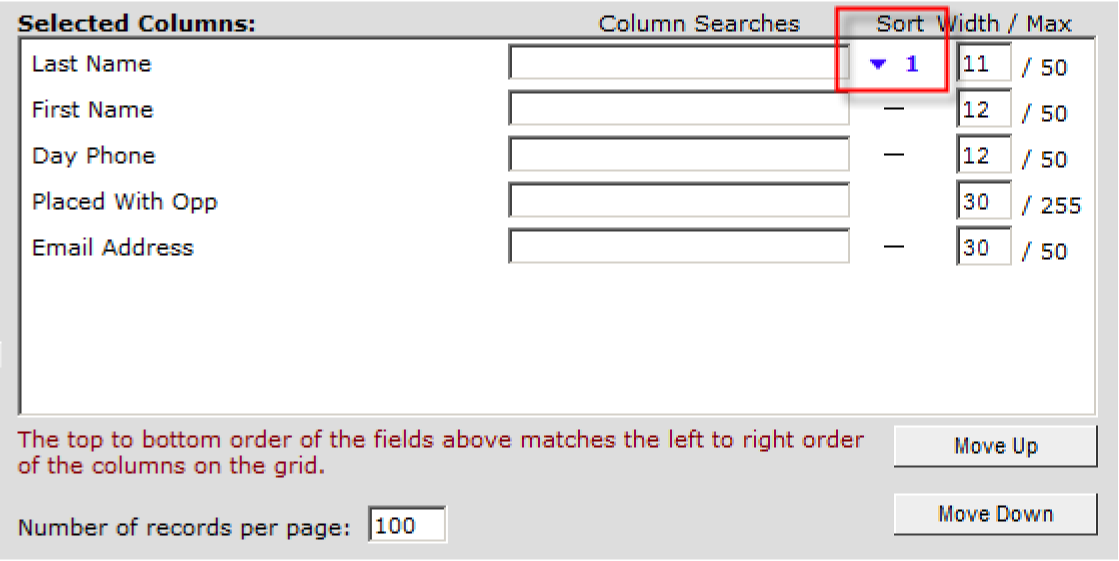
| Selected Columns: | Column Searches | Sort | Width / Max |
|---|---|---|---|
| Last Name | | ▼ 1 | 11 / 50 |
| First Name | | — | 12 / 50 |
| Day Phone | | — | 12 / 50 |
| Placed With Opp | | | 30 / 255 |
| Email Address | | — | 30 / 50 |

The top to bottom order of the fields above matches the left to right order of the columns on the grid.

Number of records per page: 100

**Action:** Demonstrate this feature by changing the order of your columns.

**Step #4**: Set your sorting order. For example: Do you want volunteer records to appear alphabetically by last name in your grid? If so, click the "–" for the "Last Name" column and the little blue arrow will appear, as shown in this image.

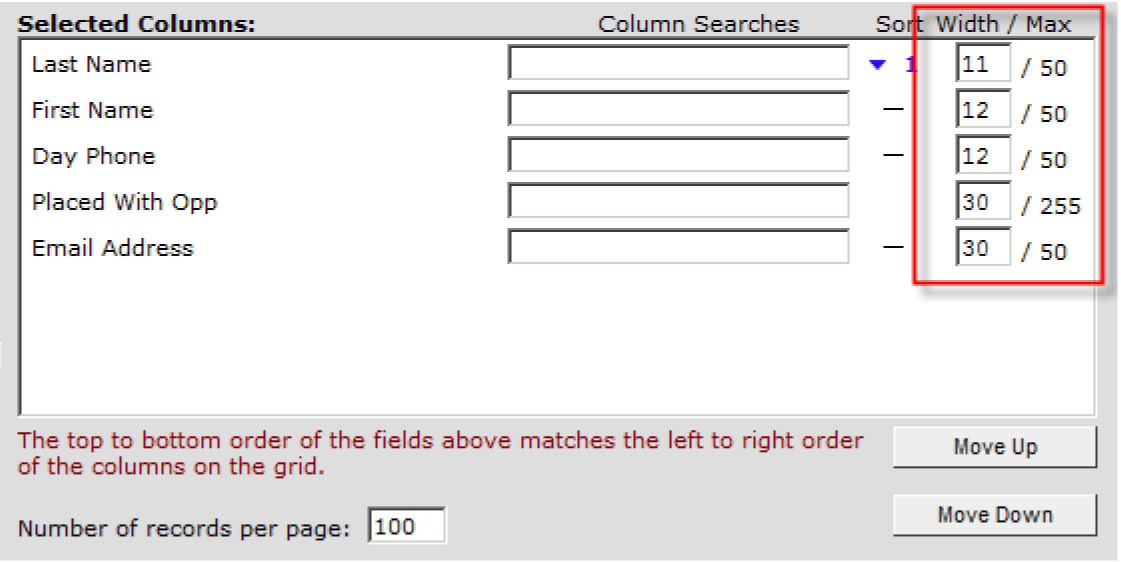


| Selected Columns: | Column Searches | Sort | Width / Max |
|---|---|---|---|
| Last Name | | ▼ 1 | 11 / 50 |
| First Name | | — | 12 / 50 |
| Day Phone | | — | 12 / 50 |
| Placed With Opp | | | 30 / 255 |
| Email Address | | — | 30 / 50 |

The top to bottom order of the fields above matches the left to right order of the columns on the grid.

Number of records per page: 100

**Step #5:** Set the width of each column. To do this, use the numerical space provided at the right side of each record. The numbers represent character width. The maximum width for each column is listed to the right of the " / ."



| Selected Columns: | Column Searches | Sort | Width / Max |
|---|---|---|---|
| Last Name | | ▼ 1 | 11 / 50 |
| First Name | | — | 12 / 50 |
| Day Phone | | — | 12 / 50 |
| Placed With Opp | | | 30 / 255 |
| Email Address | | — | 30 / 50 |

The top to bottom order of the fields above matches the left to right order of the columns on the grid.

Number of records per page: 100

## 5.2 Named Grids Part 1 Practice

Practice what you have learned so far:

**Named Grids Part 1 Practice Instructions:**

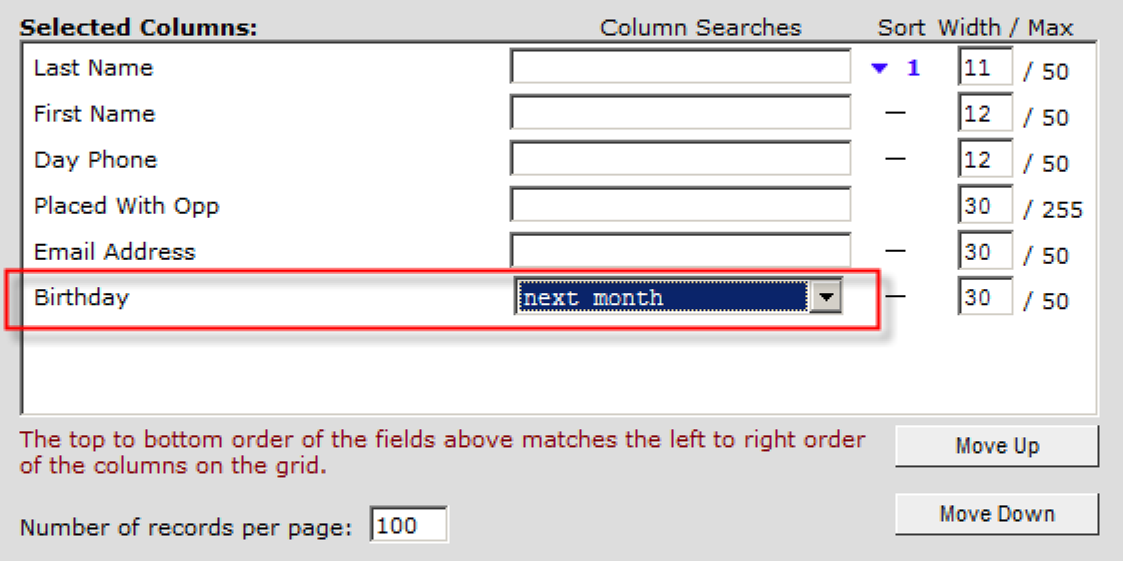
1. Go to the Volunteers tab and click the “Grid Settings” button
2. Add several columns to the basic grid
3. Reorder your columns using “Move Up” and “Move Down”
4. Sort the columns (ascending or descending)
5. Change the width on several columns
6. Do not close the window, the demo is continuing…

## 5.3 Named Grids Demonstration Part 2

**Step #6:** Pre-search your new grid by one or more items. To do this, type the item you are looking for in the space provided next to each column label. There are three important things to remember when doing this:

1. **Typing must be “recognized.”** Whatever you type must be a word that is recognized in the system. For example, if you add the “City” column, you must type the name where volunteers actually live and have used when registering themselves. Likewise, if you add the column “Referred Opp,” you must enter a specific opportunity title that exists in the system. For this reason, it is helpful to become very familiar with all of the volunteer application forms.

2. **Some fields allow numbers and dates.** Use the date format: “21 Jan 1968” (date, 3-letter month abbreviation, 4-digit year). In some cases, you may also add a "relative" search option to the number or date. For example, you could create a grid that showed everyone who has a birthday next month by activating the column “Birthday,” and selecting “next month” from the pull down menu, as shown here:



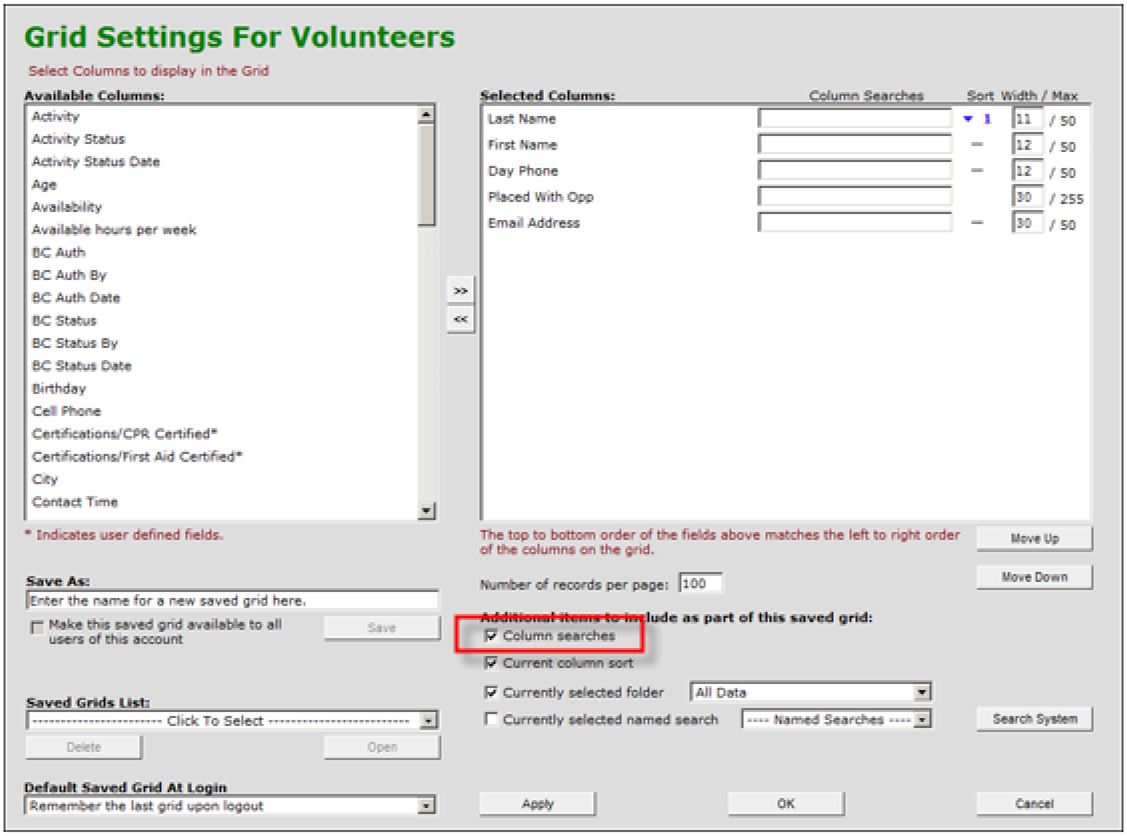
**Selected Columns:**

| | Column Searches | Sort | Width / Max |
|---|---|---|---|
| Last Name | | ▼ 1 | 11 / 50 |
| First Name | | — | 12 / 50 |
| Day Phone | | — | 12 / 50 |
| Placed With Opp | | | 30 / 255 |
| Email Address | | — | 30 / 50 |
| Birthday | next month | — | 30 / 50 |

The top to bottom order of the fields above matches the left to right order of the columns on the grid.

Number of records per page: 100

3. **Activate Column Search:** To make column searching a part of your grid, you must select the checkbox in the bottom right area that says “Column Search” so that the system knows to include what you have entered when it creates the grid.



**Grid Settings For Volunteers**

Select Columns to display in the Grid

**Available Columns:**

Activity
Activity Status
Activity Status Date
Age
Availability
Available hours per week
BC Auth
BC Auth By
BC Auth Date
BC Status
BC Status By
BC Status Date
Birthday
Cell Phone
Certifications/CPR Certified*
Certifications/First Aid Certified*
City
Contact Time

* Indicates user defined fields.

**Selected Columns:**

| | Column Searches | Sort | Width / Max |
|---|---|---|---|
| Last Name | | ▼ 1 | 11 / 50 |
| First Name | | — | 12 / 50 |
| Day Phone | | — | 12 / 50 |
| Placed With Opp | | | 30 / 255 |
| Email Address | | — | 30 / 50 |

The top to bottom order of the fields above matches the left to right order of the columns on the grid.

Number of records per page: 100

**Save As:** Enter the name for a new saved grid here.

☐ Make this saved grid available to all users of this account

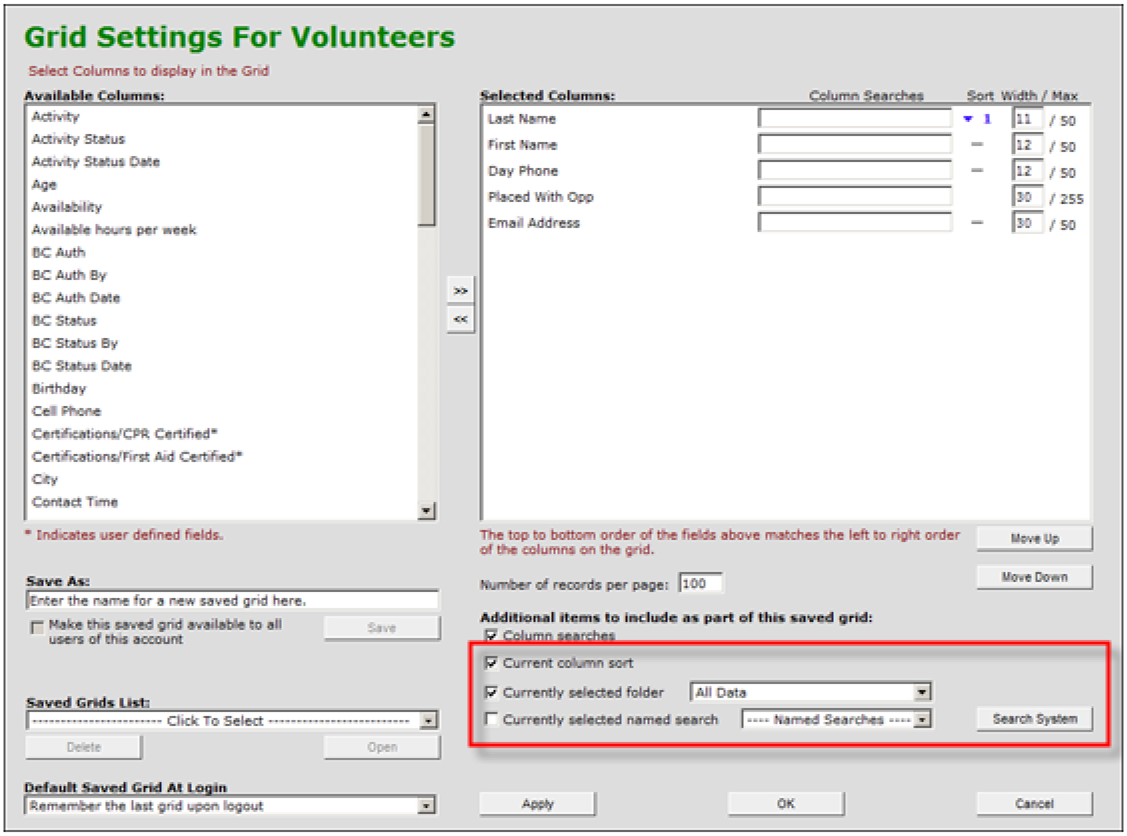
**Additional items to include as part of this saved grid:**

☑ Column searches
☑ Current column sort
☑ Currently selected folder: All Data
☐ Currently selected named search: ---- Named Searches ----

**Saved Grids List:** ------------------------ Click To Select ---------------------------

**Default Saved Grid At Login:** Remember the last grid upon logout

**Step #7:** Folders. Determine if you need to pull data from a specific folder or pre-built search. You can see the list of folders and searches in the drop-down lists shown in the image below. For example, if you are creating a grid solely to help you process new volunteers, you might select the “Inbox” as the folder from which this grid will pull its data, since that is the folder where all new volunteer registrants will appear when they sign up on eRecruiter. Likewise, if you need to include volunteers who have an interest in “Classroom Support,” for example, then select the appropriate search name from the list. Be sure to select the check box next to each item you want to include in your new grid. You may also attach and apply a named search to this grid. Named searches are discussed in the next section.



**Grid Settings For Volunteers**

Select Columns to display in the Grid

**Available Columns:**

Activity
Activity Status
Activity Status Date
Age
Availability
Available hours per week
BC Auth
BC Auth By
BC Auth Date
BC Status
BC Status By
BC Status Date
Birthday
Cell Phone
Certifications/CPR Certified*
Certifications/First Aid Certified*
City
Contact Time

* Indicates user defined fields.

**Selected Columns:**

| | Column Searches | Sort | Width / Max |
|---|---|---|---|
| Last Name | | ▼ 1 | 11 / 50 |
| First Name | | – | 12 / 50 |
| Day Phone | | – | 12 / 50 |
| Placed With Opp | | | 30 / 255 |
| Email Address | | – | 30 / 50 |

The top to bottom order of the fields above matches the left to right order of the columns on the grid.

Number of records per page: 100

**Save As:** Enter the name for a new saved grid here.

☐ Make this saved grid available to all users of this account

**Additional items to include as part of this saved grid:**

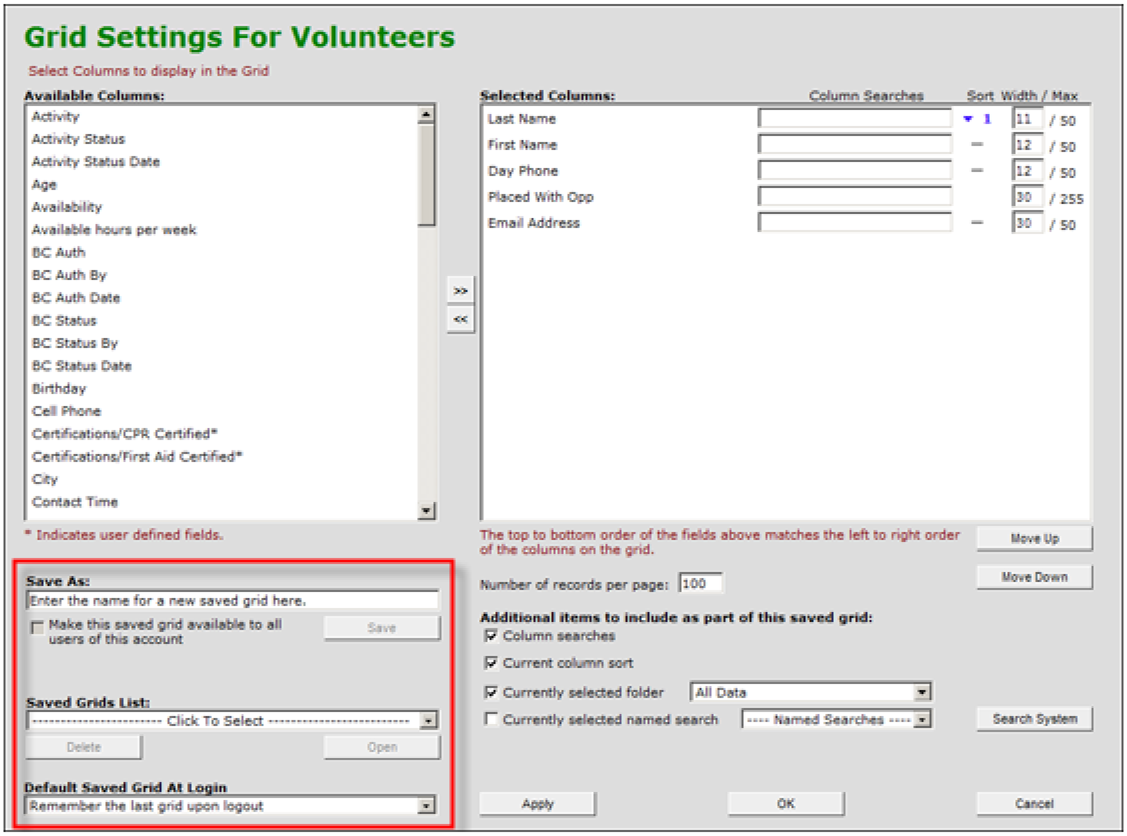
☑ Column searches
☑ Current column sort
☑ Currently selected folder: All Data
☐ Currently selected named search: ---- Named Searches ----

**Saved Grids List:** ------------------------ Click To Select ------------------------

**Default Saved Grid At Login:** Remember the last grid upon logout

**Step #8:** Name your grid. Now that you are completely clear on what you are seeking, we recommend that you name your grid something that includes all of the elements.

You can make this grid available to other people who access your same eCoordinator database by clicking the checkbox below the grid name. You may also set a saved grid to be the default grid, which is run each time you login. Or, you may set eCoordinator to simply remember the last grid that was active when you last logged out.



**Grid Settings For Volunteers**

Select Columns to display in the Grid

**Available Columns:**

- Activity
- Activity Status
- Activity Status Date
- Age
- Availability
- Available hours per week
- BC Auth
- BC Auth By
- BC Auth Date
- BC Status
- BC Status By
- BC Status Date
- Birthday
- Cell Phone
- Certifications/CPR Certified*
- Certifications/First Aid Certified*
- City
- Contact Time

* Indicates user defined fields.

**Selected Columns:**

| Selected Columns | Column Searches | Sort | Width / Max |
|---|---|---|---|
| Last Name | | ▼ 1 | 11 / 50 |
| First Name | | – | 12 / 50 |
| Day Phone | | – | 12 / 50 |
| Placed With Opp | | | 30 / 255 |
| Email Address | | – | 30 / 50 |

The top to bottom order of the fields above matches the left to right order of the columns on the grid.

**Save As:** Enter the name for a new saved grid here.

☐ Make this saved grid available to all users of this account

**Saved Grids List:** ---------------------- Click To Select ----------------------

**Default Saved Grid At Login:** Remember the last grid upon logout

Number of records per page: 100

**Additional items to include as part of this saved grid:**

☑ Column searches

☑ Current column sort

☑ Currently selected folder: All Data

☐ Currently selected named search: ---- Named Searches ----

**Step #9:** Click “OK” or “Apply.” The “OK” button will close the grid setup screen, while the “Apply” button will keep it open while also implementing the new grid.

**Additional Grid Screen Features:**

1. Managing Grids: You can open or delete a previously created grid by selecting it from the drop-down menu in the lower left.
2. Controlling Displayed Record #: You can also increase or decrease the number of records shown on a grid. The default (and maximum) is 100. Additional records are still considered to be part of the “grid” but are not displayed due to space limitations on the screen.

## 5.4 Named Grids Part 2 Practice

P

Practice

Practice the remaining skills by doing the following:

**Named Grids Part 2 Practice Instructions:**

1. Enter at least one item in the column search area. May be a number or relative date field
2. Pull data from the “All Data” folder
3. Add a pre-built search to your grid
4. Name your grid appropriately (please show instructor)
5. Click “OK” and make sure your grid shows the right data

**Action:** Monitor the practice. Watch for anyone who forgets to click “Column Search” check box. It was intentionally left out of the practice instructions.

## 5.5 Named Grids Review

**Discussion:** Discuss practical day-to-day uses for grids. List results.

Now that you know how to create grids, please complete the following review exercise:

**My Personal Review:**

1. Run all of the pre-created and new grids listed in the pull down.

2. List the most common grids you will use for *your* organization:

   ______________________________________

   ______________________________________

   ______________________________________

**Discussion**: It is VERY helpful here to lead a discussion on the different grids that class members can foresee using. List their answers to question 2 on the board along with new items they come up with in the discussion.

## Part VI

# Email System

# 6 Email System

I

Intro

Using eCoordinator, you can send email to clients, volunteers, opportunities, or to organizations. eCoordinator has automated the email function, enabling you to send individual emails to large numbers of recipients automatically. The eCoordinator email system protects recipient information so that each recipient sees only their own information, not the email addresses or information for any other recipients.

## 6.1 Email Demonstration

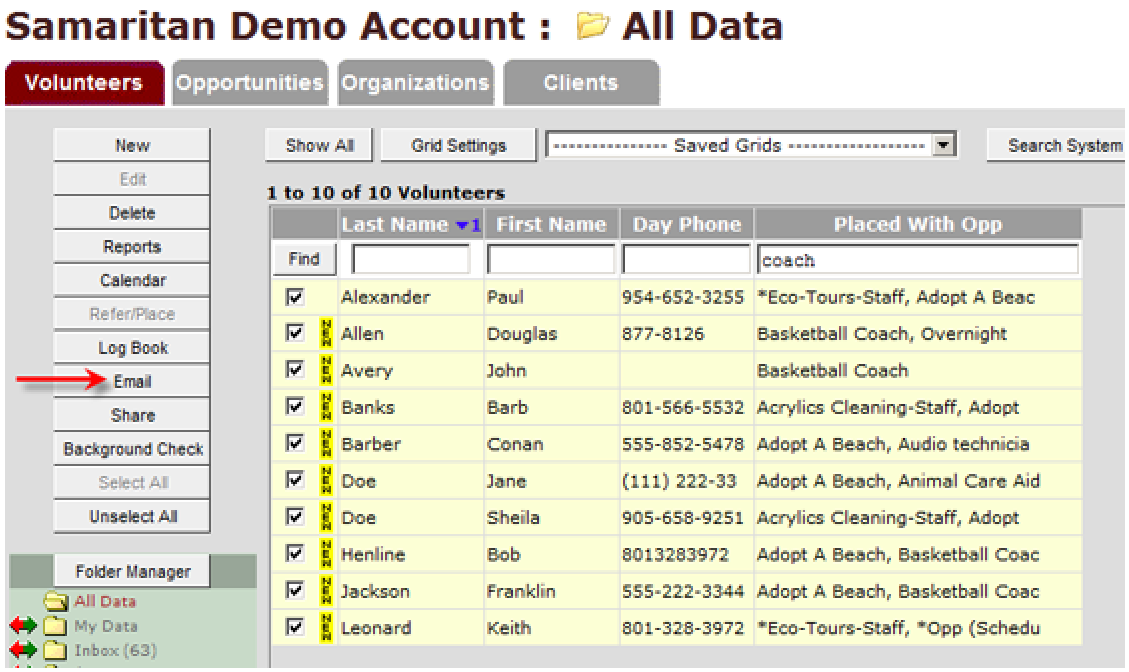
D

Demo

**Action:** To demonstrate the email system, follow the steps listed here.

**Step 1:** Select email recipient(s) from the data grid.

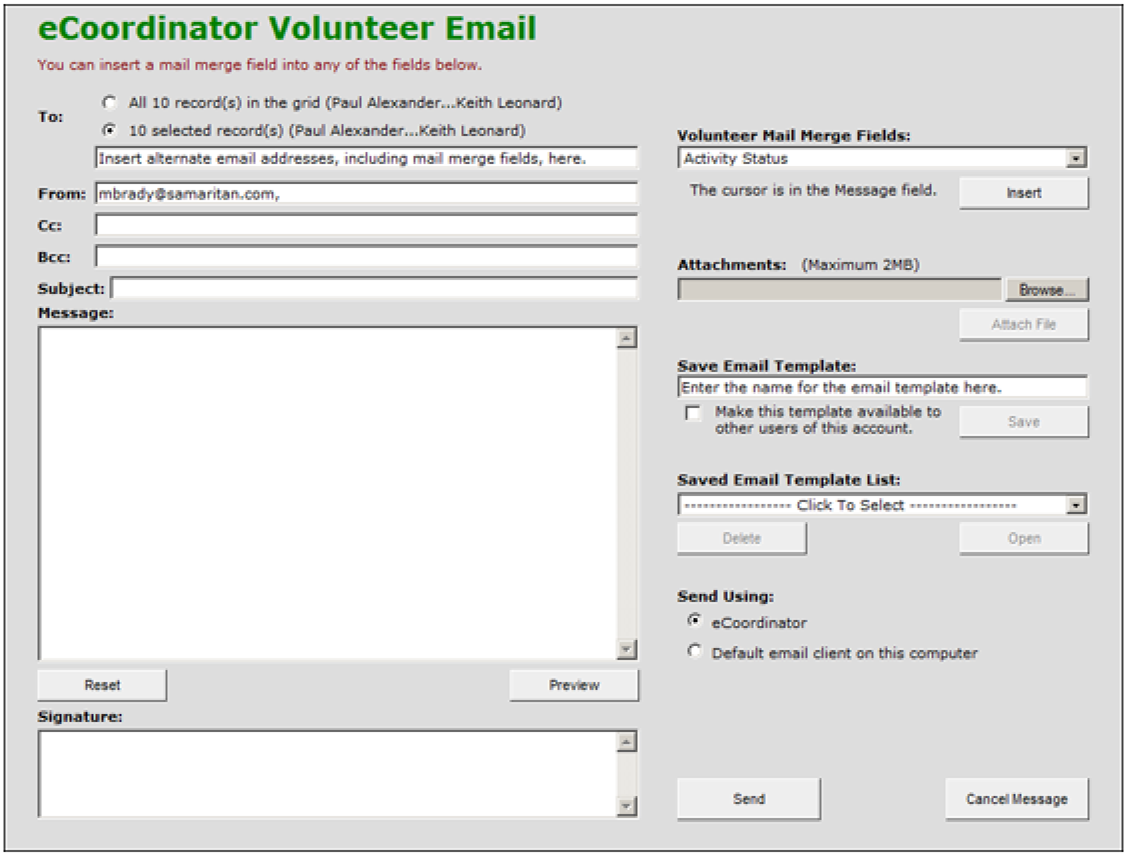
**Step 2:** Click "Email" button from the menu on the left.


Samaritan Demo Account : All Data
Volunteers
Opportunities
Organizations
Clients
New
Edit
Delete
Reports
Calendar
Refer/Place
Log Book
Email
Share
Background Check
Select All
Unselect All
Folder Manager
All Data
My Data
Inbox (63)
Show All
Grid Settings
Saved Grids
Search System

1 to 10 of 10 Volunteers

| | | Last Name ▾1 | First Name | Day Phone | Placed With Opp |
|---|---|---|---|---|---|
| Find | | | | | coach |
| ☑ | | Alexander | Paul | 954-652-3255 | *Eco-Tours-Staff, Adopt A Beac |
| ☑ | NEW | Allen | Douglas | 877-8126 | Basketball Coach, Overnight |
| ☑ | NEW | Avery | John | | Basketball Coach |
| ☑ | NEW | Banks | Barb | 801-566-5532 | Acrylics Cleaning-Staff, Adopt |
| ☑ | NEW | Barber | Conan | 555-852-5478 | Adopt A Beach, Audio technicia |
| ☑ | NEW | Doe | Jane | (111) 222-33 | Adopt A Beach, Animal Care Aid |
| ☑ | NEW | Doe | Sheila | 905-658-9251 | Acrylics Cleaning-Staff, Adopt |
| ☑ | NEW | Henline | Bob | 8013283972 | Adopt A Beach, Basketball Coac |
| ☑ | NEW | Jackson | Franklin | 555-222-3344 | Adopt A Beach, Basketball Coac |
| ☑ | NEW | Leonard | Keith | 801-328-3972 | *Eco-Tours-Staff, *Opp (Schedu |

This is the main email system screen:



eCoordinator Volunteer Email

You can insert a mail merge field into any of the fields below.

To:
○ All 10 record(s) in the grid (Paul Alexander...Keith Leonard)
● 10 selected record(s) (Paul Alexander...Keith Leonard)
Insert alternate email addresses, including mail merge fields, here.

From: mbrady@samaritan.com,

Cc:

Bcc:

Subject:

Message:

Signature:

Volunteer Mail Merge Fields: Activity Status

The cursor is in the Message field.

Attachments: (Maximum 2MB)

Save Email Template: Enter the name for the email template here.

☐ Make this template available to other users of this account.

Saved Email Template List: ------------------ Click To Select ------------------

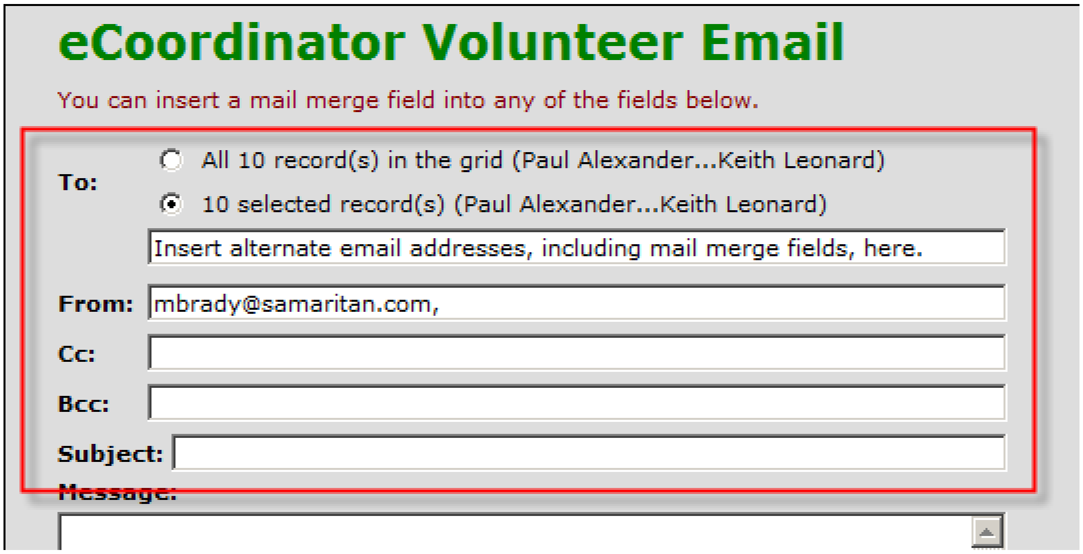
Send Using:
● eCoordinator
○ Default email client on this computer

The system will save the last message sent, so when you open the email window, there may already be a message in the text box. If this happens, click the "Reset" button.

**Step 3:** Select whether your email message is going only to selected recipients or to everyone in the data grid.

You can enter additional email addresses in the Cc and Bcc fields. Addresses in the Cc field are visible to all recipients, addresses in the Bcc field are invisible to all recipients.

If you want to have a copy of the email you are sending, **please Cc yourself**. eCoordinator is not an email client software, and will therefore not retain sent messages.



eCoordinator Volunteer Email

You can insert a mail merge field into any of the fields below.

To:
○ All 10 record(s) in the grid (Paul Alexander...Keith Leonard)
● 10 selected record(s) (Paul Alexander...Keith Leonard)
Insert alternate email addresses, including mail merge fields, here.

From: mbrady@samaritan.com,

Cc:

Bcc:

Subject:

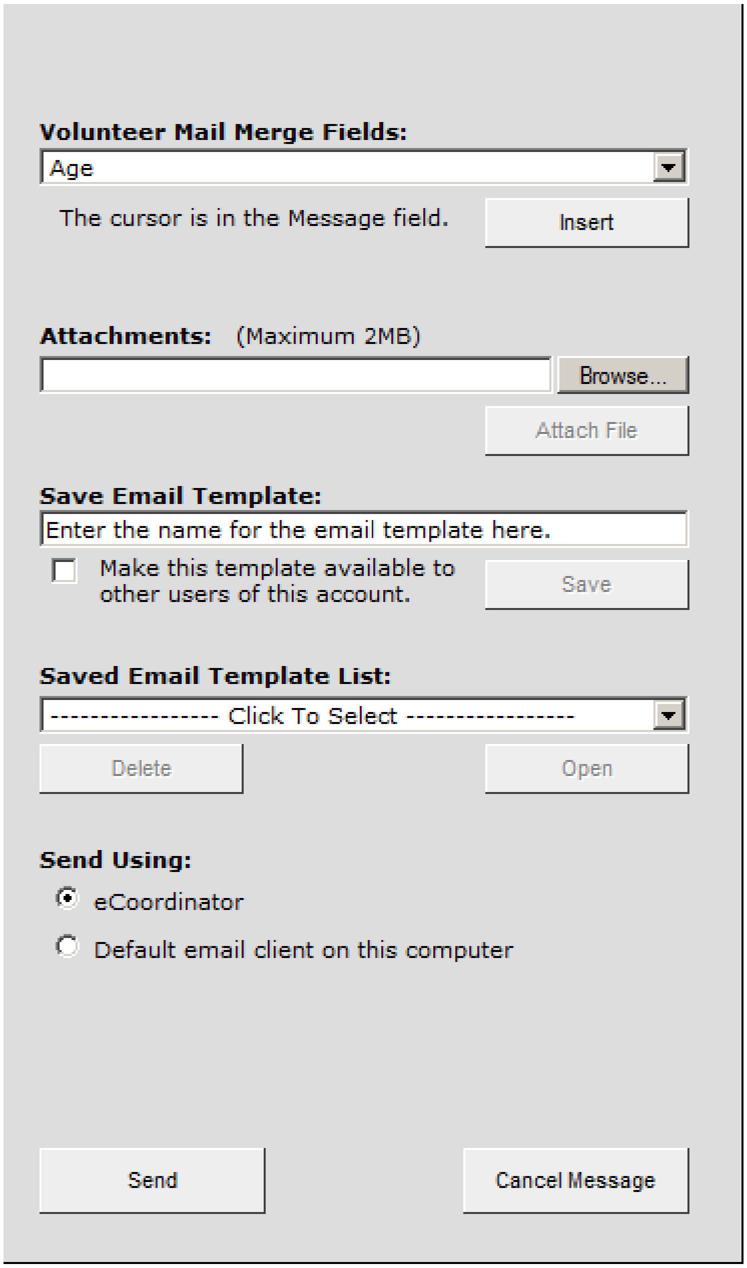
Message:

**Step 4:** Enter your return address and email signature information. These only need to be entered once as the system will save them for you. They can be changed at any time.

**Step 5:** Enter a SUBJECT for your message. This is a required field.

**Additional Options:**

- **Mail Merging:** You can use "Volunteer Mail Merge Fields" to personalize your message. There are several mail merge fields available, simply use the pull-down menu to insert the field into the text area of your message where appropriate.



**Volunteer Mail Merge Fields:** Age

The cursor is in the Message field.

**Attachments:** (Maximum 2MB)

**Save Email Template:** Enter the name for the email template here.

☐ Make this template available to other users of this account.

**Saved Email Template List:** ----------------- Click To Select -----------------

**Send Using:**

● eCoordinator

○ Default email client on this computer

- **Attachments:** The email system also allows you to attach files (up to 2MiB) to your email message. To attach a file, click the "Browse" button under the attachment header, and an Explorer window will open on your computer. Double-click the desired file to attach it to the email message.

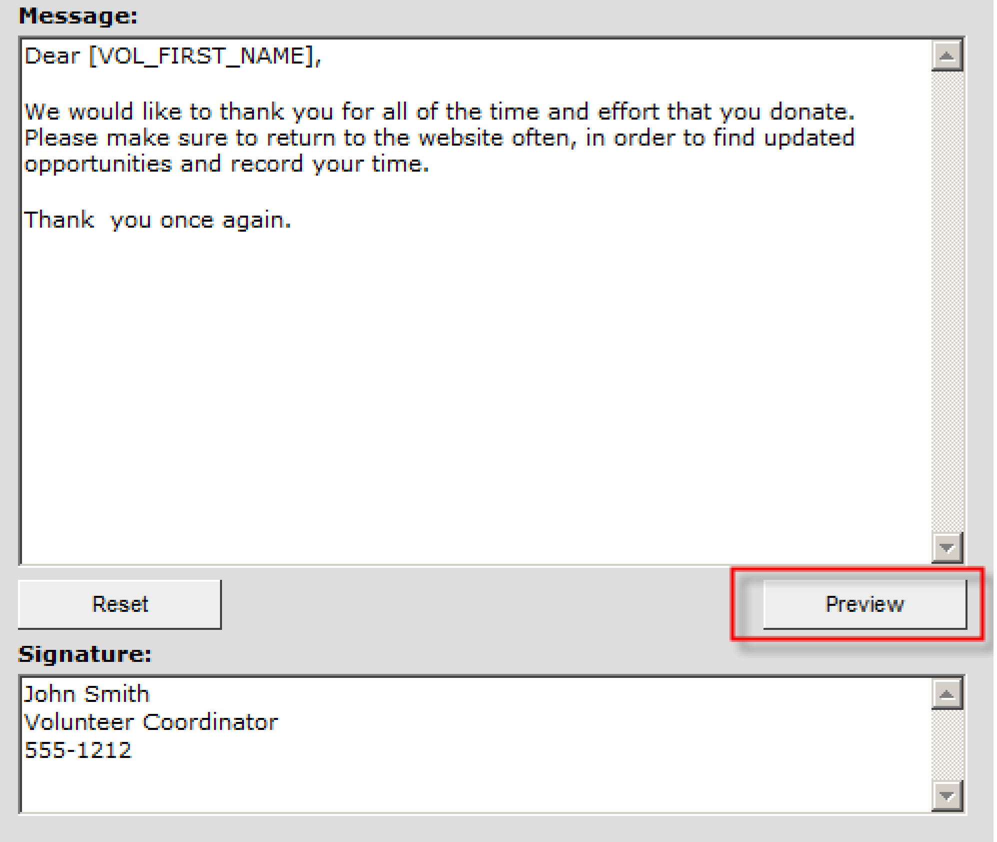
  Please note, however, that many receiving email systems will block any email that has attachments. We recommend that you upload any files to a separate server and insert the associated hyperlink in to the email in eCoordinator. To learn more how to do this, see “Formating & Hyperlinks” instructions later in this training section.

- **Templates:** If you intend to use this message again, you can save it as an email template. Templates help save time by automating processes that you repeat often. Saving your message as a template will enable you to send the same message to additional recipients at another time by selecting those recipients and then selecting the message from the "Saved Email Template List."

When saving your template, you can opt to make it available to other users of this eCoordinator account or save it to your personal data by using the check box.

You can also clean up your template list by deleting any you no longer need.

- **Previews:** You can click the "Preview" button to see how your message will appear to your recipients.



**Message:**

Dear [VOL_FIRST_NAME],

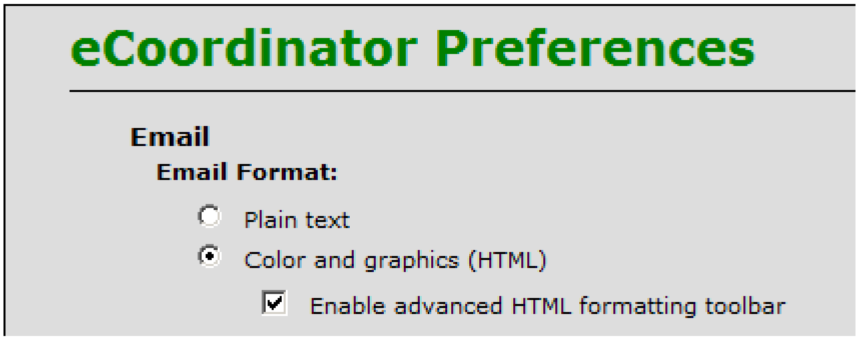
We would like to thank you for all of the time and effort that you donate. Please make sure to return to the website often, in order to find updated opportunities and record your time.

Thank you once again.

**Signature:**

John Smith
Volunteer Coordinator
555-1212

- **Formatting & Hyperlinks:**



eCoordinator Preferences

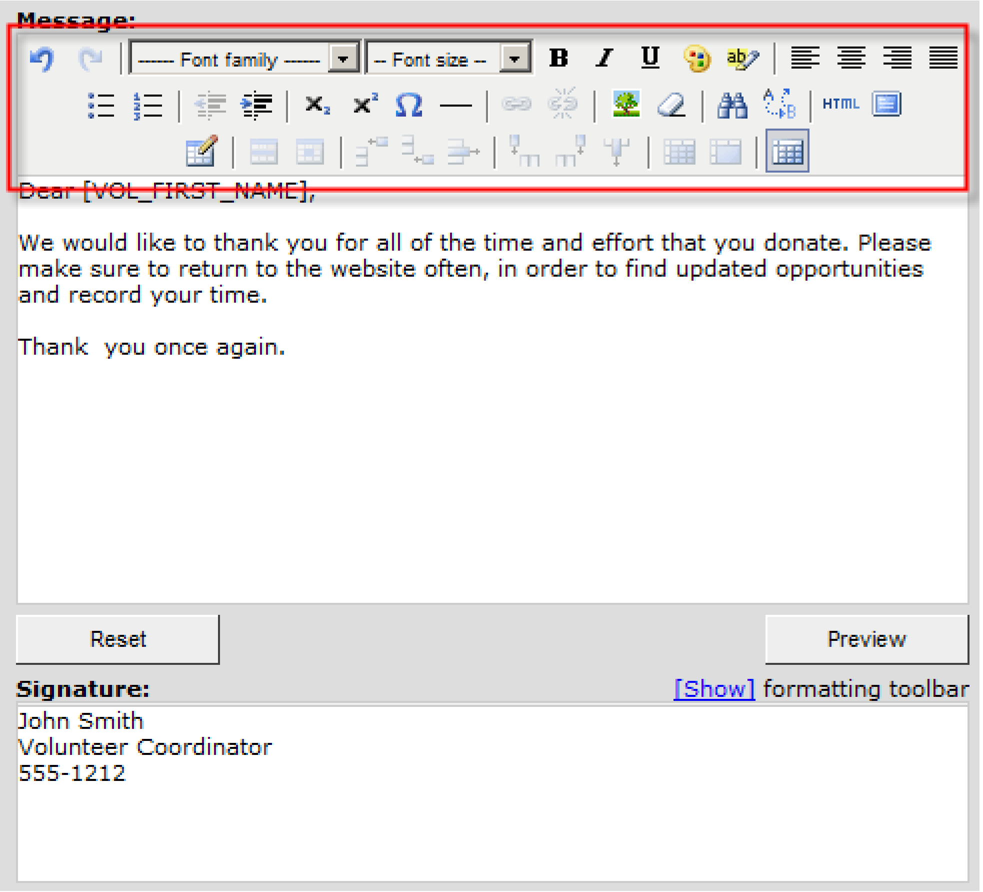
**Email**

**Email Format:**

○ Plain text
● Color and graphics (HTML)
☑ Enable advanced HTML formatting toolbar

You can format your email and add text by turning on the advanced HTML formatting option. To do this go to:
Menu bar> Tools> Preferences
Select "Color and graphics (HTML)" radio button
Select “Enable advanced HTML formatting toolbar“

When you return to the email screen (it must re-load) then you will see the toolbar:


Message:
------ Font family ------
-- Font size --
HTML
Reset
Preview
[Show] formatting toolbar

Dear [VOL_FIRST_NAME],

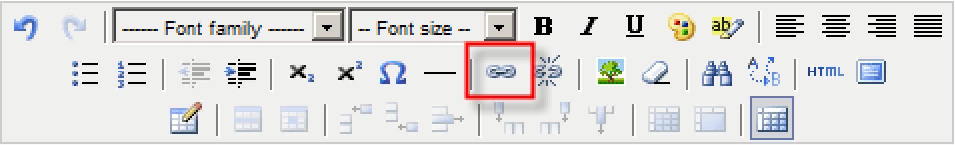
We would like to thank you for all of the time and effort that you donate. Please make sure to return to the website often, in order to find updated opportunities and record your time.

Thank you once again.

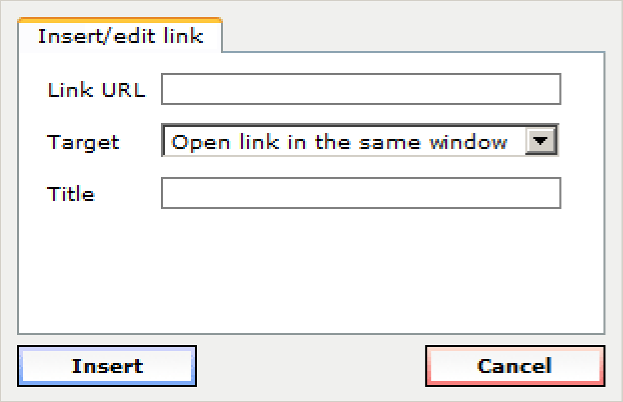
Signature:

John Smith
Volunteer Coordinator
555-1212

To create a hyperlink, highlight the word you wish to build a link for and click the universal icon for hyperlinks (the chain link, as shown).


------ Font family ------
-- Font size --
HTML

This screen will appear:



Target: Open link in the same window

Enter the location (URL) of the file you wish volunteers to download when they click the hyperlink you're creating.

The safest way to assure the link will work is to test it in a browser window and then paste it directly in to this screen.

PLEASE DO NOT ACTUALLY SEND YOUR EMAIL DURING TRAINING!!

Once you send your message, you will see a confirmation screen telling you how many emails were sent and to what addresses. Any errors encountered (missing addresses, incorrect addresses, etc.) will also be shown.

Click "OK" to close the report window.

## 6.2 Email Practice

**Practice Instructions:**

1. Select a volunteer to send an email
2. Add yourself to the Cc field
3. Write an email that includes a salutation and a hyperlink to a the your organization's homepage
4. Save this email as template, naming it appropriately
5. Launch the preview screen and ask your instructor to review it

**Action:** Give the directions and then monitor the trainees.

## 6.3 Email Review

**My Personal Review:**

1. Who do you think would receive the email if you accessed the email screen from the opportunities tab? Organizations tab? Clients tab?

   ____________________________________

   ____________________________________

2. Does the signature remain even if multiple emails are written?

   YES NO

3. What is a better option than sending an attachment?

   ____________________________________

**Answer Key:**

1. Opportunities Tab = Opportunity Contact
   Organization Tab = Organization Contact
   Clients Tab = Client
2. YES
3. Creating a hyperlink to a previously uploaded document

## Part VII

# Volunteer Referrals and Placements

# 7 Volunteer Referrals and Placements

This topic will cover the ways in which you can connect volunteers and clients with opportunities. Before beginning, please remember that new volunteers will automatically be appearing inside your Inbox folder. The question, then, is how to review them and make decisions about whether a referral should be converted to a placement. First, we will discuss referrals and placements.

**What is the difference between a referral and a placement?**

**I. Volunteers:**

Referrals come from volunteers asking to be signed-up for one or more opportunities they found while searching eRecruiter. Placements, however, can only be made by you. You can make a placement at any time, but it is recommended that you only do so when the volunteer is aware of it. If they have self-referred for the placement online, then they are certainly aware that you are considering them for the opportunity. If they have not self-referred the placement on the website, be sure you have communicated with them in some other way before making the placement.

Electronically, only those volunteers who have been placed can enter hours and answer other questions you may have about service they have done. Therefore, all volunteers who work inside ANY of your opportunities must be placed. To minimize the amount of work for you, we strongly recommend when you have a new service opportunity, that you publish it on eRecruiter and inform volunteers that if they want to serve, they will need to sign up. This creates the “self-referral” in the system. You can then easily review and turn it in to a placement by following the instructions in this section.

There are three ways to connect volunteers and opportunities.

1. **From the Volunteers Tab:** Allows you to find a service opportunity for volunteers.
2. **From the Opportunities Tab:** Allows you to find volunteers for opportunities.
3. **From the Scheduling System:** It is also possible to place from the Scheduling System. This will be covered in the “Scheduling System” section of this manual.

We will first discuss how to review referrals and place opportunities to volunteers. This includes the method for approving referrals that volunteers have made on eRecruiter. We will then discuss how to review which volunteers have self-referred to work in a selected opportunity and make placements from there.

**II. Clients:**

Unlike volunteers, referrals do not come from clients via eRecruiter. Referrals and placements can only be made by you. You can make a referral or placement at any time. As the client is a recipient of some service provided by your organization, it is likely that they already understand and know that they will be receiving this aid. However, be sure you have communicated with them in some other way before making placements.

There are two ways to connect clients and opportunities.

1. **From the Opportunities Tab:** Allows you to find clients for opportunities.
2. **From the Scheduling System:** It is also possible to place from the Scheduling System. This will be covered in the “Scheduling System” section of this manual.

## 7.1 Referral and Placement Demonstration

D
Demo

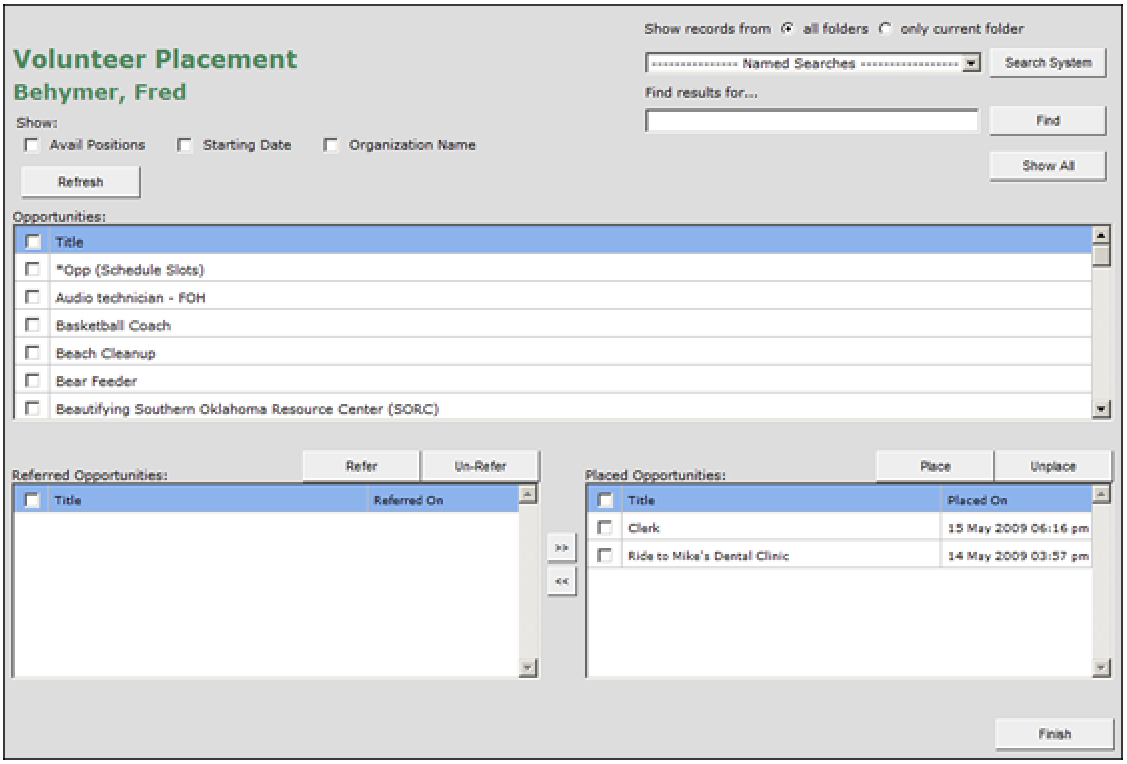
Follow the instructions below whenever you are trying to find a service opportunity for a volunteer or approve a referral made by a specific volunteer.

**Finding (or approving) Opportunities for Volunteers:**

1. Click the “Volunteers” tab
2. Check the box next to the volunteer whom you wish to place
3. Click the “Refer/Place” button in the column on the left side of your screen
4. The “Volunteer Placements” window opens for the selected volunteer

The Volunteer Placements window will display several opportunities for the volunteer. You can use the search feature to narrow the opportunities by typing an opportunity name in the search box at the top of the page and clicking find.

Select the opportunity you wish to refer for that volunteer and click the “Refer/Place” button.


Show records from ● all folders ○ only current folder
Named Searches
Search System
Find results for...
Find
Show All
Show:
☐ Avail Positions
☐ Starting Date
☐ Organization Name
Refresh
Refer
Un-Refer
Place
Unplace
>>
<<
Finish

Volunteer Placement

Behymer, Fred

Opportunities:

| ☐ | Title |
|---|---|
| ☐ | *Opp (Schedule Slots) |
| ☐ | Audio technician - FOH |
| ☐ | Basketball Coach |
| ☐ | Beach Cleanup |
| ☐ | Bear Feeder |
| ☐ | Beautifying Southern Oklahoma Resource Center (SORC) |

Referred Opportunities:

| ☐ | Title | Referred On |
|---|---|---|

Placed Opportunities:

| ☐ | Title | Placed On |
|---|---|---|
| ☐ | Clerk | 15 May 2009 06:16 pm |
| ☐ | Ride to Mike's Dental Clinic | 14 May 2009 03:57 pm |

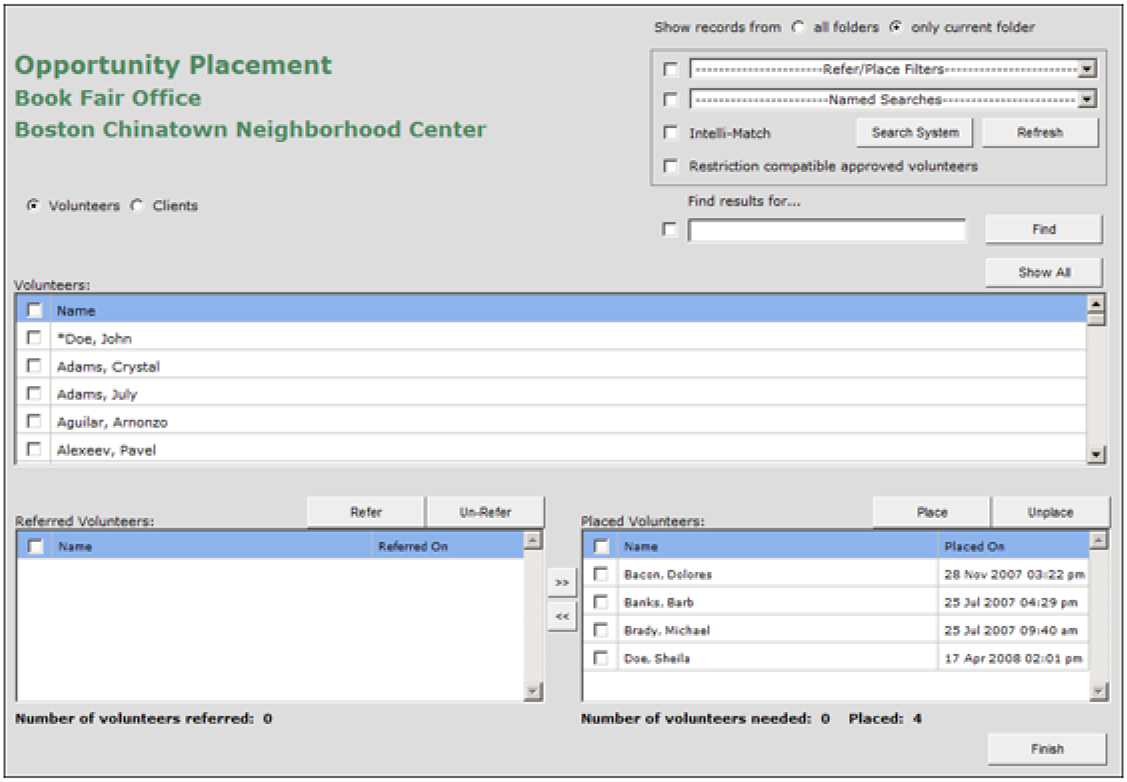
In the top area of the screen you will notice there are ways to search for specific opportunities by entering a title or running one of the pre-built searches. The results will appear in the main window. You can highlight a specific opportunity by selecting the check box next to it. To place the volunteer to your selected service opportunity, click the title and click the “Place” button. There are also directional arrows between the refer and place windows that you can use to move the Volunteer to “Referred” or “Placed” as appropriate.

The “Un-Refer” and “Unplace” buttons on this screen will remove the opportunity from your current list.

### Finding Volunteers for Opportunities:

1. Click the “Opportunities” tab to make sure it is active
2. Check the box next to the Opportunity for which you wish to Refer or Place volunteers
3. Click the “Refer/Place” button in the column on the left side of your screen

The “Opportunity Placements” window opens for the selected opportunity.


Show records from ○ all folders ● only current folder
☐ ----------Refer/Place Filters----------
☐ ----------Named Searches----------
☐ Intelli-Match
Search System
Refresh
☐ Restriction compatible approved volunteers
Find results for...
☐
Find
Show All
● Volunteers ○ Clients
Refer
Un-Refer
>>
<<
Place
Unplace
Finish

**Opportunity Placement**
**Book Fair Office**
**Boston Chinatown Neighborhood Center**

Volunteers:

| ☐ | Name |
|---|---|
| ☐ | *Doe, John |
| ☐ | Adams, Crystal |
| ☐ | Adams, July |
| ☐ | Aguilar, Arnonzo |
| ☐ | Alexeev, Pavel |

Referred Volunteers:

| ☐ | Name | Referred On |
|---|---|---|

**Number of volunteers referred: 0**

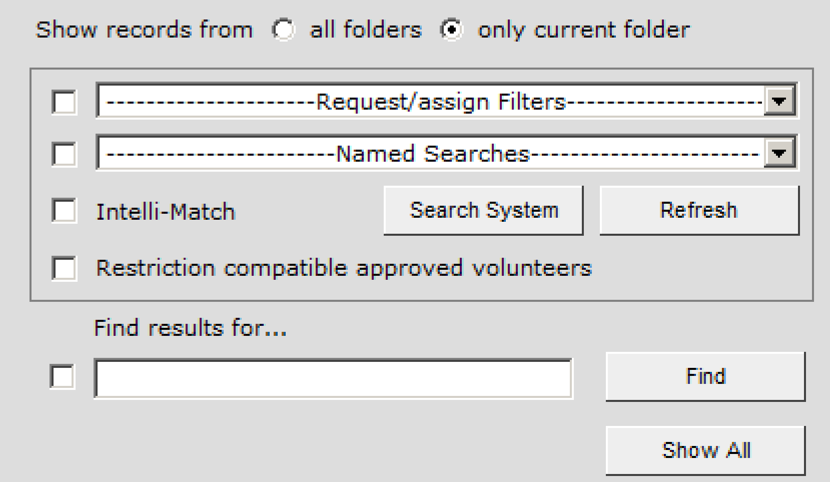
Placed Volunteers:

| ☐ | Name | Placed On |
|---|---|---|
| ☐ | Bacon, Dolores | 28 Nov 2007 03:22 pm |
| ☐ | Banks, Barb | 25 Jul 2007 04:29 pm |
| ☐ | Brady, Michael | 25 Jul 2007 09:40 am |
| ☐ | Doe, Sheila | 17 Apr 2008 02:01 pm |

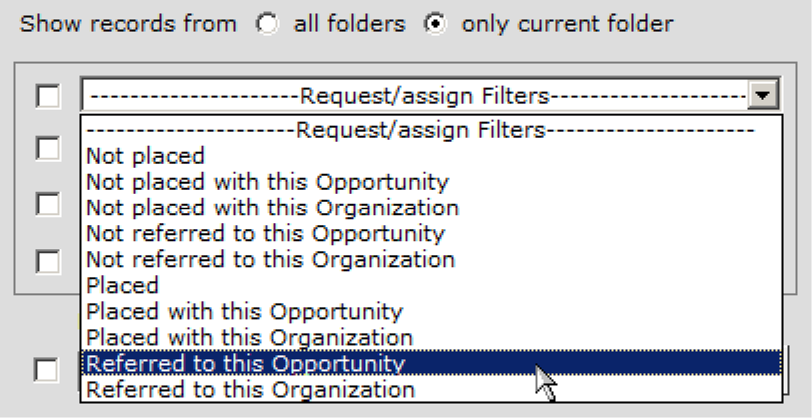
**Number of volunteers needed: 0 Placed: 4**

At the top you will see the name of the opportunity as well as three different options for identifying the best qualified volunteer(s) for it. These are meant to be used individually or collectively. You "activate" each option by selecting its check box.

Here is additional information on each option:

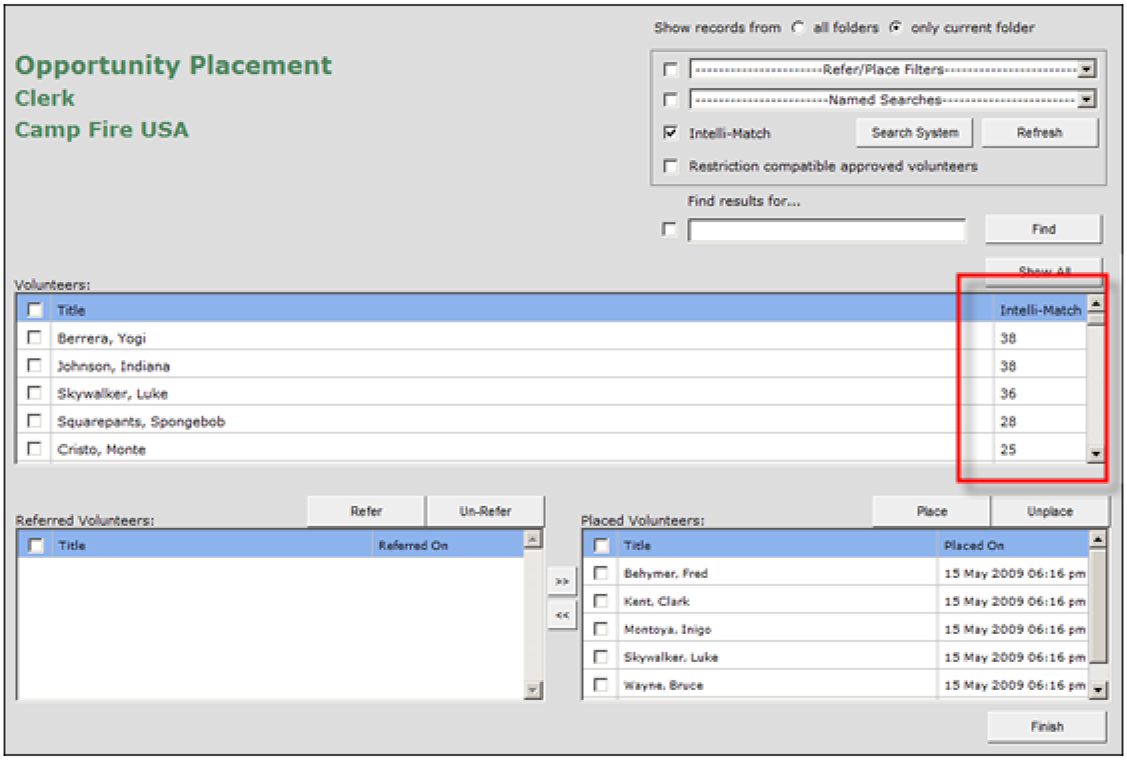

Show records from ○ all folders ● only current folder
☐ ----------Request/assign Filters----------
☐ ----------Named Searches----------
☐ Intelli-Match
Search System
Refresh
☐ Restriction compatible approved volunteers
Find results for...
☐
Find
Show All

1. **Using Refer/Place filters:** This option allows you to search for volunteers based on their previous placements, referrals or their association with one of your organizations. The most common option is “Referred to the opportunity,” which will display all of those volunteers who have self-referred it on eRecruiter. Click the “Refresh” button to see results in the main window.


Show records from ○ all folders ● only current folder
☐
☐
☐
☐
☐
--------------------Request/assign Filters--------------------
--------------------Request/assign Filters--------------------
Not placed
Not placed with this Opportunity
Not placed with this Organization
Not referred to this Opportunity
Not referred to this Organization
Placed
Placed with this Opportunity
Placed with this Organization
Referred to this Opportunity
Referred to this Organization

2. **Adding a Named Search:** You can choose which search you would like to use by selecting it from the drop-down menu. These are the same pre-built volunteer searches you see on the main volunteer screen. Click the “Refresh” button to see results in the main window.

3. **Intelli-Match:** If the “Intelli-Match” box is selected, the volunteers will be reordered based on a score that they receive. This score indicates how closely their profiles match the profile of your selected opportunity. Note that Intelli-Match does not guarantee a proper match and should only be used when the other methods are not narrowing your results sufficiently.


Opportunity Placement
Clerk
Camp Fire USA

Show records from ○ all folders ● only current folder
☐ ----------------------Refer/Place Filters----------------------
☐ ----------------------Named Searches----------------------
☑ Intelli-Match
Search System
Refresh
☐ Restriction compatible approved volunteers
Find results for...
☐
Find
Show All
Volunteers:
Refer
Un-Refer
Referred Volunteers:
>>
<<
Place
Unplace
Placed Volunteers:
Finish

| ☐ | Title | Intelli-Match |
|---|---|---|
| ☐ | Berrera, Yogi | 38 |
| ☐ | Johnson, Indiana | 38 |
| ☐ | Skywalker, Luke | 36 |
| ☐ | Squarepants, Spongebob | 28 |
| ☐ | Cristo, Monte | 25 |

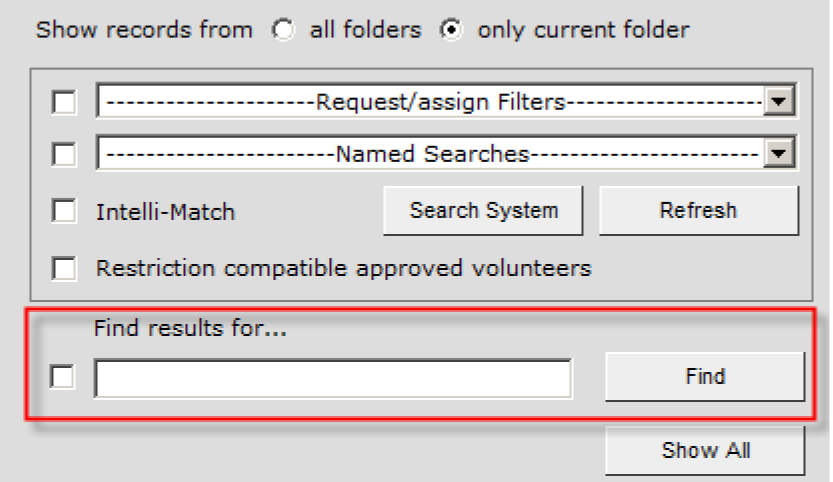
| ☐ | Title | Referred On |
|---|---|---|

| ☐ | Title | Placed On |
|---|---|---|
| ☐ | Behymer, Fred | 15 May 2009 06:16 pm |
| ☐ | Kent, Clark | 15 May 2009 06:16 pm |
| ☐ | Montoya, Inigo | 15 May 2009 06:16 pm |
| ☐ | Skywalker, Luke | 15 May 2009 06:16 pm |
| ☐ | Wayne, Bruce | 15 May 2009 06:16 pm |

**A Note about Intelli-Match…**

It is possible to get a high Intelli-Match score for a volunteer who is not suited for the Opportunity. Any match between the profiles increases the score. There is no adjustment made for the criteria one thinks is most important. For example, if you are looking for a Japanese speaker who likes tutoring and is available on Tuesdays during school, you might get a high match from someone who is available at the right time, wants to tutor, likes to work with groups, and is interested in education, but does *not* speak Japanese.

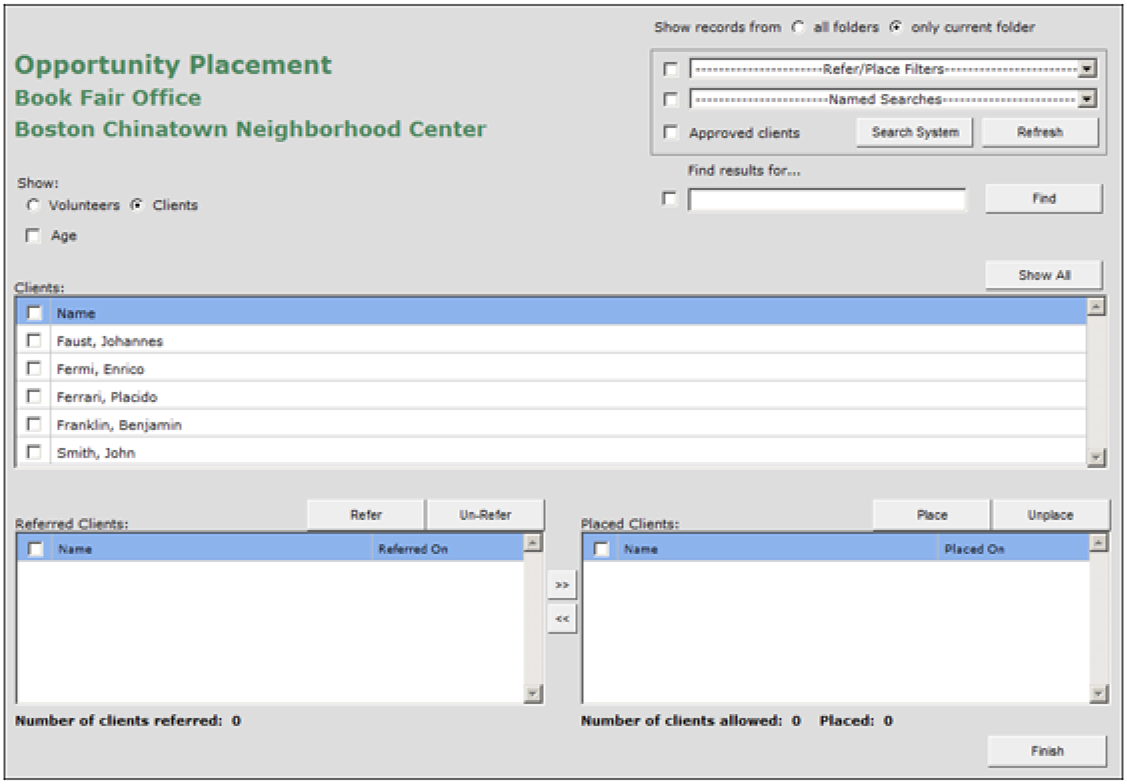
4. **Finding a specific volunteer:** If you do not need to narrow the list of volunteers you are viewing, then ignore the three check boxes and select the volunteer from the list in the main window. To find a specific volunteer by name enter the name in the space provided.


Show records from ○ all folders ● only current folder
☐ ---------------------Request/assign Filters--------------------
☐ -----------------------Named Searches-----------------------
☐ Intelli-Match
Search System
Refresh
☐ Restriction compatible approved volunteers
Find results for...
☐
Find
Show All

**Finding Clients for Opportunities:**

1. Click the “Opportunities” tab to make sure it is active
2. Check the box next to the Opportunity for which you wish to Refer or Place clients
3. Click the “Refer/Place” button in the column on the left side of your screen

The “Opportunity Placements” window opens for the selected opportunity. Click the "Clients" radio button under the opportunity and organization title.



Opportunity Placement
Book Fair Office
Boston Chinatown Neighborhood Center

Show records from ○ all folders ● only current folder

☐ ------------Refer/Place Filters------------
☐ ------------Named Searches------------
☐ Approved clients

Find results for...
☐

Show:
○ Volunteers ● Clients
☐ Age

Clients:

| ☐ | Name |
|---|---|
| ☐ | Faust, Johannes |
| ☐ | Fermi, Enrico |
| ☐ | Ferrari, Placido |
| ☐ | Franklin, Benjamin |
| ☐ | Smith, John |

Referred Clients:

| ☐ | Name | Referred On |
|---|---|---|

Placed Clients:

| ☐ | Name | Placed On |
|---|---|---|

**Number of clients referred: 0**

**Number of clients allowed: 0 Placed: 0**

The search filters for this view are the same as from the "Volunteers" view of this same screen.

**Placing or Referring from eRecruiter:**

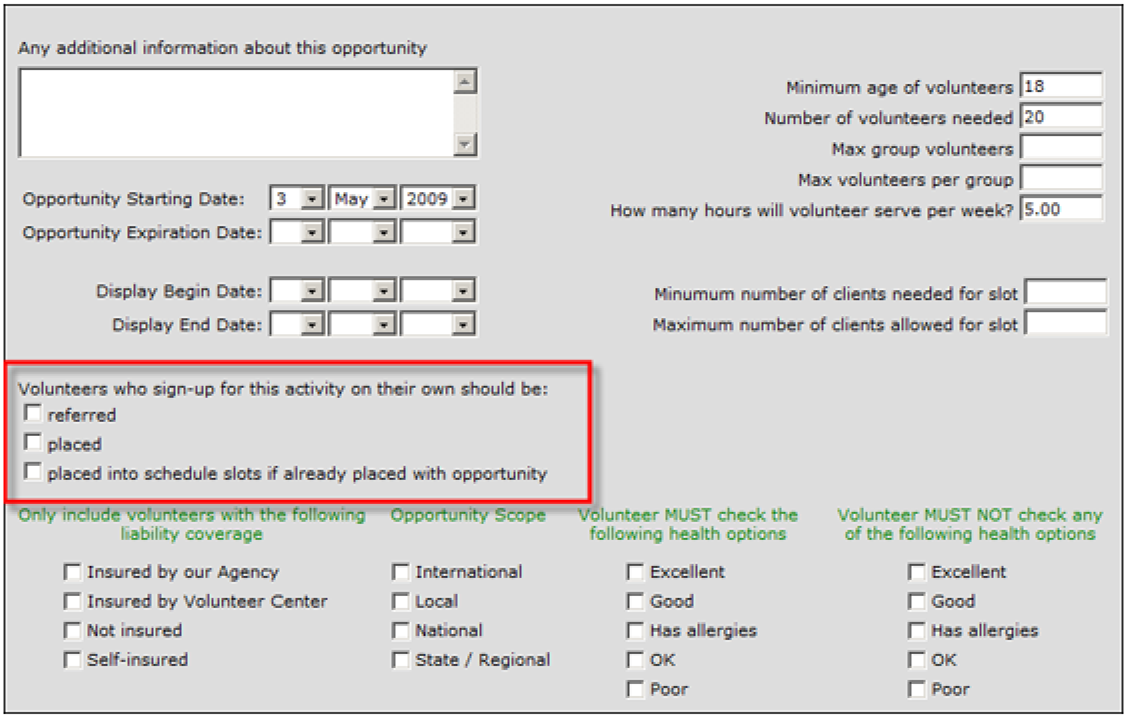
All eRecruiters must be designated as either a "Placement eRecruiter" or a "Referral eRecruiter," meaning that when volunteers sign up for opportunities online, they are either placed by default, or referred by default. However, this behavior can be overriden. For example, a school will want to set up a Referral eRecruiter, because they work with children and cannot put this vulnerable population at risk by not screening volunteers prior to placing them with an opportunity. However, the school may want to put on a workshop or a training course, and would like it to be open to the public. The eCoordinator user would not want the hassle of placing each person who signs up, since no screening process is required for this one-time opportunity. For times like these, turn to the "Additional Info" tab on the opportunity profile, and find the field labeled "Volunteers who sign-up for this activity on their own should be":

There are three checkbox options:

- referred
- placed
- placed into schedule slots if already placed with opportunity

Whatever is selected here precludes and overrides the default eRecruiter functionality. In our example example, where the eRecruiter is set up to refer all volunteers who sign up, but the volunteer manager would like volunteers to be automatically placed with the training, the volunteer manager could select the “placed” checkbox. This will override the eRecruiter setting and place all volunteers who sign up for that particular opportunity via the eRecruiter.

Please note that because they are checkboxes, more than one option can be selected. These three checkboxes are also available as grid columns on the Opportunities tab.



Any additional information about this opportunity

Opportunity Starting Date: 3 May 2009

Opportunity Expiration Date:

Display Begin Date:

Display End Date:

Minimum age of volunteers 18

Number of volunteers needed 20

Max group volunteers

Max volunteers per group

How many hours will volunteer serve per week? 5.00

Minumum number of clients needed for slot

Maximum number of clients allowed for slot

Volunteers who sign-up for this activity on their own should be:

☐ referred

☐ placed

☐ placed into schedule slots if already placed with opportunity

| Only include volunteers with the following liability coverage | Opportunity Scope | Volunteer MUST check the following health options | Volunteer MUST NOT check any of the following health options |
|---|---|---|---|
| ☐ Insured by our Agency | ☐ International | ☐ Excellent | ☐ Excellent |
| ☐ Insured by Volunteer Center | ☐ Local | ☐ Good | ☐ Good |
| ☐ Not insured | ☐ National | ☐ Has allergies | ☐ Has allergies |
| ☐ Self-insured | ☐ State / Regional | ☐ OK | ☐ OK |
| | | ☐ Poor | ☐ Poor |

## 7.2 Referral and Placement Practice

P

Practice

**Referral and Placement Practice Instructions:**

1. Place the volunteer you entered earlier with your opportunity
2. Place the client you entered earlier with your opportunity
3. Select your opportunity and place volunteers with it
4. Filter using 2 of 3 methods
5. Select multiple volunteers
6. Click “Refer” or “Place”
7. Did they show up on the main grids in appropriate columns?

## 7.3 Referral and Placement Review

**My Personal Review:**

1. What are two of the three ways to connect a volunteer to an opportunity?

   ______________________________________

   ______________________________________

2. What are the three filters that can be applied when finding volunteers for an opportunity placement?

   ______________________________________

   ______________________________________

   ______________________________________

3. When *should* Intelli-Match be used?

   ______________________________________

   ______________________________________

   ______________________________________

**Answer Key:**

1. Answers may include:
   a) The volunteer self-referring to an opportunity via eRecruiter
   b) Using the “Refer/Place” button from the Volunteers screen
   c) Using the “Refer/Place” button from the Opportunities screen
2. "Refer/Place Filters," “Named Searches,” and “Intelli-Match"
3. Only when other options do not narrow the list of volunteers sufficiently

## Part VIII

# Scheduling System

# 8 Scheduling System

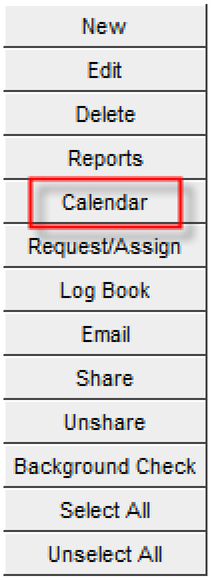
Intro

The first thing to know about the scheduling system is that it is *entirely optional*. It is perfectly acceptable to create and publish service opportunities that do not have schedules. Volunteers can still sign up for them and you have now been trained on how to process their records.

However, there are some good reasons to consider scheduling in the following situations:

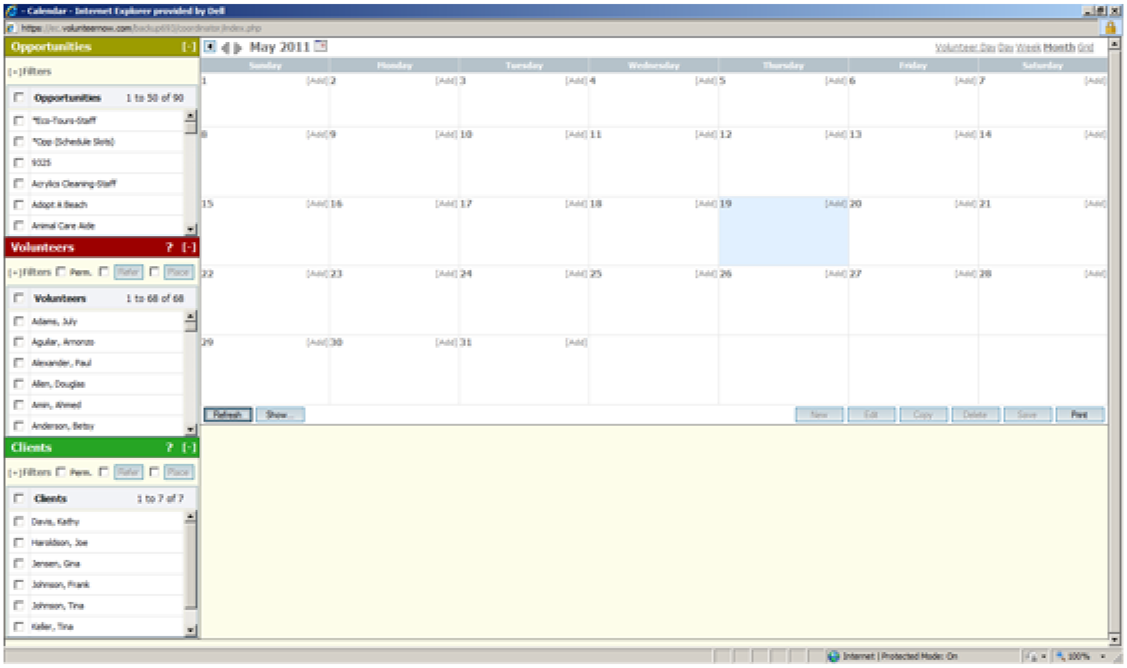
1. You are running an event that has many volunteers doing multiple tasks simultaneously
2. You have a recurring event or training that occurs on a consistent schedule (like every other Saturday, etc.)
3. Your volunteers prefer to see their upcoming schedules on eRecruiter

**Accessing Scheduling:** If any of these describe what you do, then you will need to use our scheduling system. It can be accessed from the Volunteers, Opportunities, Organizations, and Clients tabs. If you want to schedule specific volunteers or review their upcoming assignments please go to the Opportunities tab and click on “Calendar.” If you need to create a schedule for a specific opportunity then go to the Opportunities tab and click the same button.



The scheduling system consists of several elements which we will train you on individually, but the basic concept is that schedule slots are created for existing service opportunities and then filled with assigned volunteers. We will start by providing an orientation to the schedule system layout and will then demonstrate how to do basic tasks.

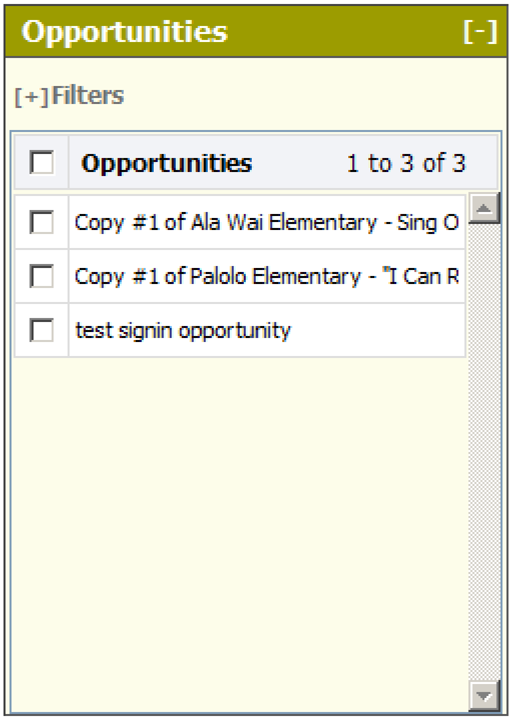
Here is how the main scheduling calendar appears by default:


Calendar - Internet Explorer provided by Dell
Opportunities [-]
[+]Filters
Opportunities 1 to 50 of 90
*Eco-Tours-Staff
*Opp (Schedule Slots)
9325
Acrylics Cleaning-Staff
Adopt A Beach
Animal Care Aide
Volunteers ? [-]
[+]Filters Perm. Refer Place
Volunteers 1 to 68 of 68
Adams, July
Aguilar, Amorzo
Alexander, Paul
Allen, Douglas
Amin, Ahmed
Anderson, Betsy
Clients ? [-]
[+]Filters Perm. Refer Place
Clients 1 to 7 of 7
Davis, Kathy
Haroldson, Joe
Jensen, Gina
Johnson, Frank
Johnson, Tina
Keller, Tina
May 2011
Volunteer Day Day Week Month Grid
Sunday
Monday
Tuesday
Wednesday
Thursday
Friday
Saturday
Refresh
Show...
New
Edit
Copy
Delete
Save
Print
Internet | Protected Mode: On
100%

## Key Elements

Now we will introduce you to the key elements of the screen:

1. Opportunities view: This is where you select the opportunity for which you want to create or edit a schedule. Use the [+] Filters screen to access the pre-built opportunity searches in order to further refine the displayed list.


Opportunities [-]
[+]Filters

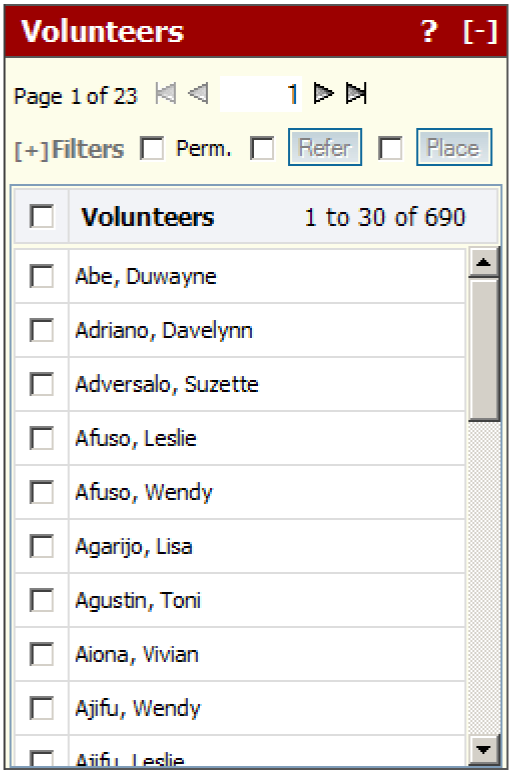
☐ **Opportunities** 1 to 3 of 3

☐ Copy #1 of Ala Wai Elementary - Sing O

☐ Copy #1 of Palolo Elementary - "I Can R

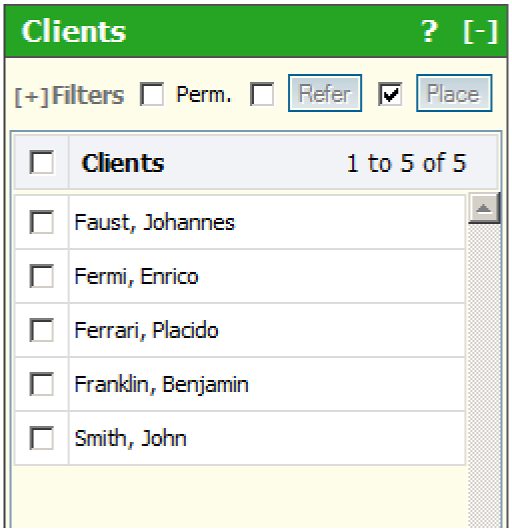
☐ test signin opportunity

2. Volunteers view: This allows you to select a volunteer whose schedule you would like to view or work on. By selecting both a volunteer and an opportunity, you will see when a volunteer is scheduled for that opportunity. As with the opportunities window, you can also use the [+] Filters to apply pre-built searches to see only the volunteers you want. If you want to view only certain volunteer(s), please select them on the main Volunteers tab before accessing scheduling.


Volunteers
? [-]
Page 1 of 23
1
[+]Filters
☐ Perm.
☐ Refer
☐ Place
☐ Volunteers
1 to 30 of 690

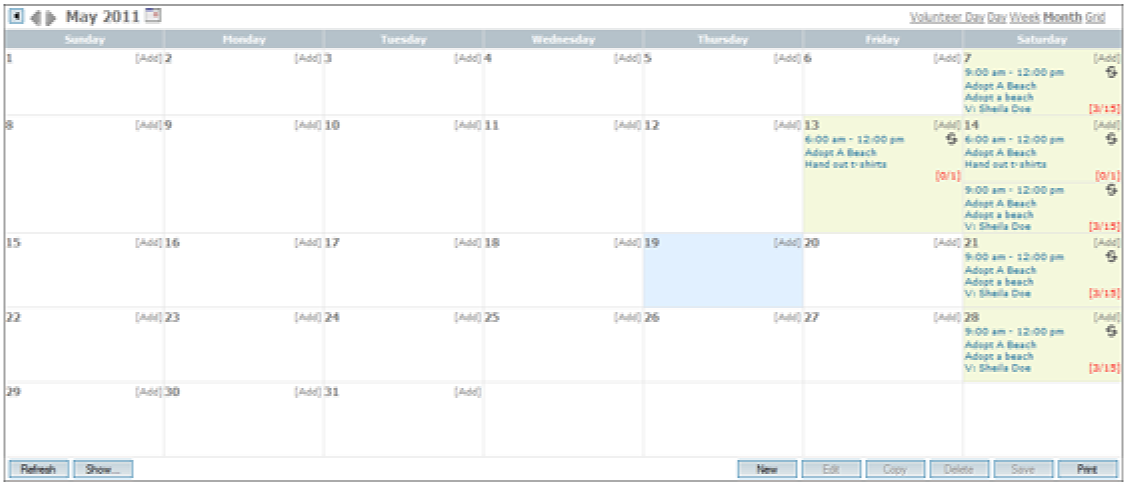
☐ Abe, Duwayne
☐ Adriano, Davelynn
☐ Adversalo, Suzette
☐ Afuso, Leslie
☐ Afuso, Wendy
☐ Agarijo, Lisa
☐ Agustin, Toni
☐ Aiona, Vivian
☐ Ajifu, Wendy
☐ Ajifu, Leslie

3. Clients view: This is where you select the client(s) which you want to place into a schedule slot. Use the [+] Filters screen to access the pre-built client searches in order to further refine the displayed list.


Clients
? [-]
[+]Filters
☐ Perm.
☐ Refer
☑ Place
☐ Clients
1 to 5 of 5

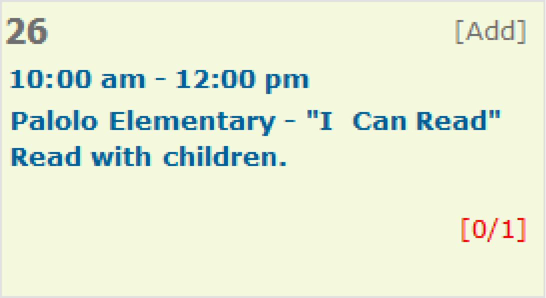
☐ Faust, Johannes
☐ Fermi, Enrico
☐ Ferrari, Placido
☐ Franklin, Benjamin
☐ Smith, John

4. Calendar view: This allows you to view schedule slots that you have previously created. Schedule creation will be demonstrated later, but below are some additional items that will help you understand the layout better.



| Sunday | Monday | Tuesday | Wednesday | Thursday | Friday | Saturday |
|---|---|---|---|---|---|---|
| 1 [Add] | 2 [Add] | 3 [Add] | 4 [Add] | 5 [Add] | 6 [Add] | 7 [Add]<br>9:00 am - 12:00 pm<br>Adopt A Beach<br>Adopt a beach<br>V: Sheila Doe<br>[3/15] |
| 8 [Add] | 9 [Add] | 10 [Add] | 11 [Add] | 12 [Add] | 13 [Add]<br>6:00 am - 12:00 pm<br>Adopt A Beach<br>Hand out t-shirts<br>[0/1] | 14 [Add]<br>6:00 am - 12:00 pm<br>Adopt A Beach<br>Hand out t-shirts<br>[0/1]<br>9:00 am - 12:00 pm<br>Adopt A Beach<br>Adopt a beach<br>V: Sheila Doe<br>[3/15] |
| 15 [Add] | 16 [Add] | 17 [Add] | 18 [Add] | 19 [Add] | 20 [Add] | 21 [Add]<br>9:00 am - 12:00 pm<br>Adopt A Beach<br>Adopt a beach<br>V: Sheila Doe<br>[3/15] |
| 22 [Add] | 23 [Add] | 24 [Add] | 25 [Add] | 26 [Add] | 27 [Add] | 28 [Add]<br>9:00 am - 12:00 pm<br>Adopt A Beach<br>Adopt a beach<br>V: Sheila Doe<br>[3/15] |
| 29 [Add] | 30 [Add] | 31 [Add] |  |  |  |  |

- A "day" has a yellow background when there is an active schedule slot (or slots) on that day. A blue background appears for whatever day you are currently working on.
- Fractions: For example, you may see a "[0/1]" in the bottom right of the slot. This is interpreted that zero volunteers are currently assigned to a minimum number of one schedule slots on this day.



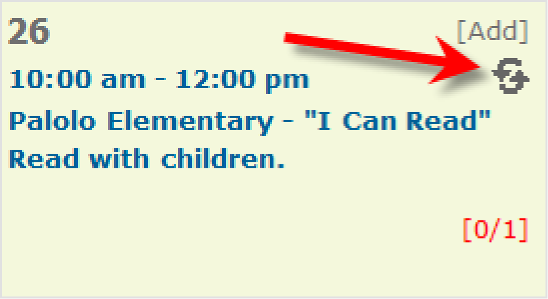
26 [Add]

10:00 am - 12:00 pm

Palolo Elementary - "I Can Read"
Read with children.

[0/1]

- This symbol indicates that the schedule slot is one of many slots in a repeating pattern that was created.



26 [Add]

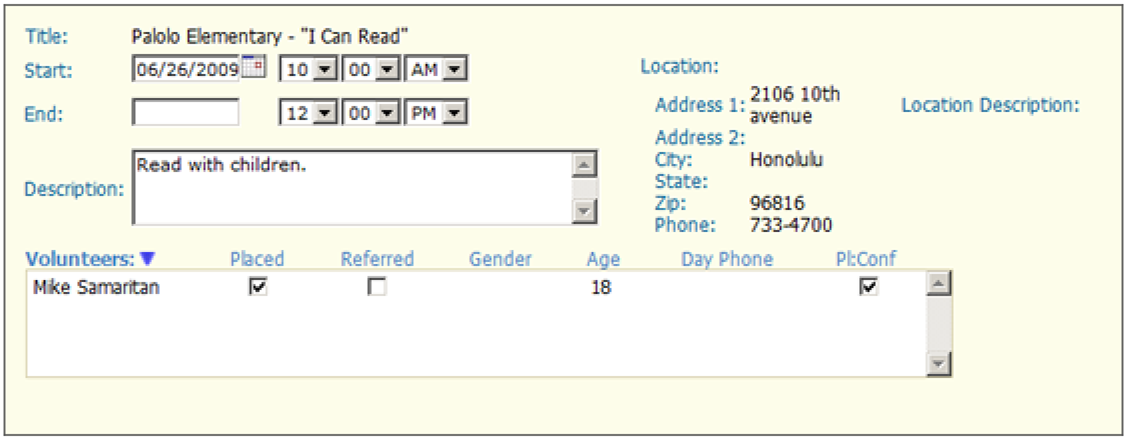
10:00 am - 12:00 pm

Palolo Elementary - "I Can Read"
Read with children.

[0/1]

- When you select a slot from the calendar view, details will appear at the bottom of the screen.

These will appear much like this:



Title: Palolo Elementary - "I Can Read"

Start: 06/26/2009 10 00 AM

End: 12 00 PM

Description: Read with children.

Location:

Address 1: 2106 10th avenue

Address 2:

City: Honolulu

State:

Zip: 96816

Phone: 733-4700

Location Description:

| Volunteers: ▼ | Placed | Referred | Gender | Age | Day Phone | Pl:Conf |
|---|---|---|---|---|---|---|
| Mike Samaritan | ☑ | ☐ |  | 18 |  | ☑ |

- Note that for the selected slot you can readily see who is currently scheduled for the selected slot and that there is a “Conf” (for “Confirmed”) checkbox you can use to indicate when you have verified that a volunteer will show up at the scheduled time.

## 8.1 Scheduling Demonstration Part 1

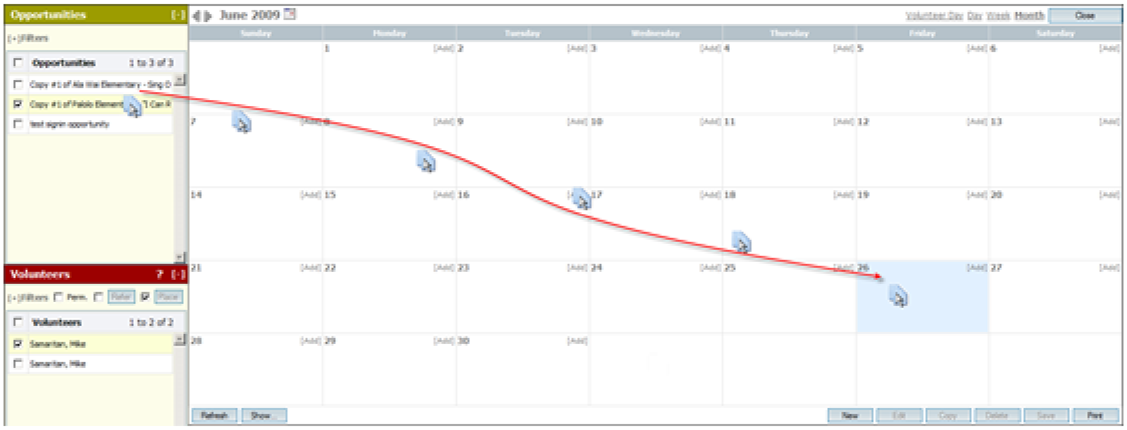
Our demonstration for the scheduling system will walk you through the basic functions of creating and filling multiple time slots.

**Step #1:** From the opportunities tab, select the opportunity for which you would like to create a schedule

**Step #2:** Click the “Calendar” button

**Step #3:** Pick any *future* day during the *current* month by selecting it on the calendar

**Step #4:** Drag and drop your selected opportunity from the opportunities window on to your selected day

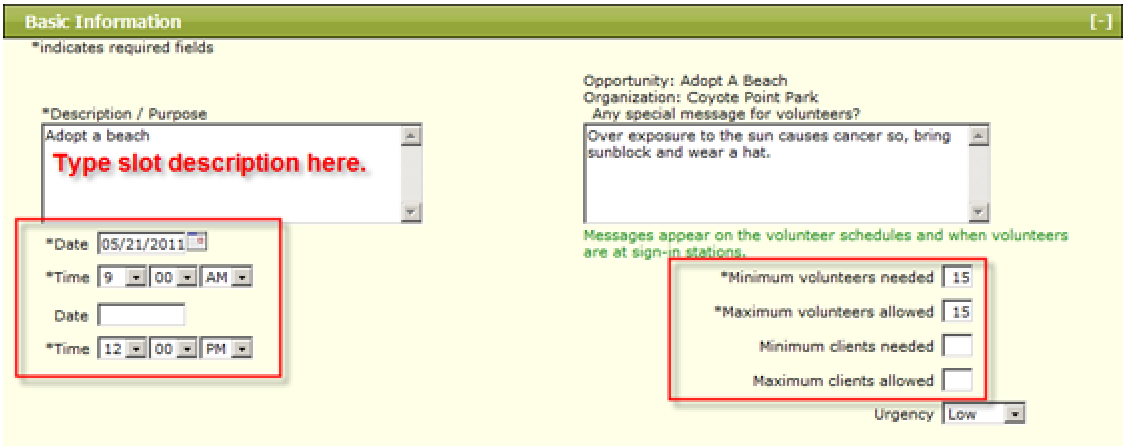

Opportunities [-]
[+]Filters
☐ Opportunities 1 to 3 of 3
☐ Copy #1 of Ala Wai Elementary - Sing O
☑ Copy #1 of Palolo Element "I Can R
☐ test signin opportunity
Volunteers ? [-]
[+]Filters ☐ Perm. ☐ Refer ☑ Place
☐ Volunteers 1 to 2 of 2
☑ Samaritan, Mike
☐ Samaritan, Mike
June 2009
Sunday
Monday
Tuesday
Wednesday
Thursday
Friday
Saturday
Volunteer Day Day Week Month
Close
Refresh
Show
New
Edit
Copy
Delete
Save
Print

As soon as you drop the opportunity on the date you selected, the system will open a new schedule slot profile.

**Step #5:** Enter a description & time for the slot.

Use the spaces provided to enter a brief description of what the volunteer(s) will be doing during. For example, if the service opportunity is "I Can Read," you can create multiple slots and use the description field to list the specific dates and times for which you need volunteers to sign up. Volunteers will see these descriptions next to each time slot on the opportunity details screen from helphawaiischools.com. When they sign up for the slot, they also sign up for sign up for the assignment you entered here.

**Entering Time:** To enter the times, select the beginning and end times from the drop down lists. The date will already be filled in from the calendar screen. Schedule slots may start on one day and end on another day (i.e., go past midnight, if necessary). If you leave the "End Date" field blank, the system will assume that the start and end times are on the same date, as entered in "Start Date."


Basic Information [-]

*indicates required fields

*Description / Purpose: Adopt a beach

Type slot description here.

*Date 05/21/2011
*Time 9 : 00 AM
Date
*Time 12 : 00 PM

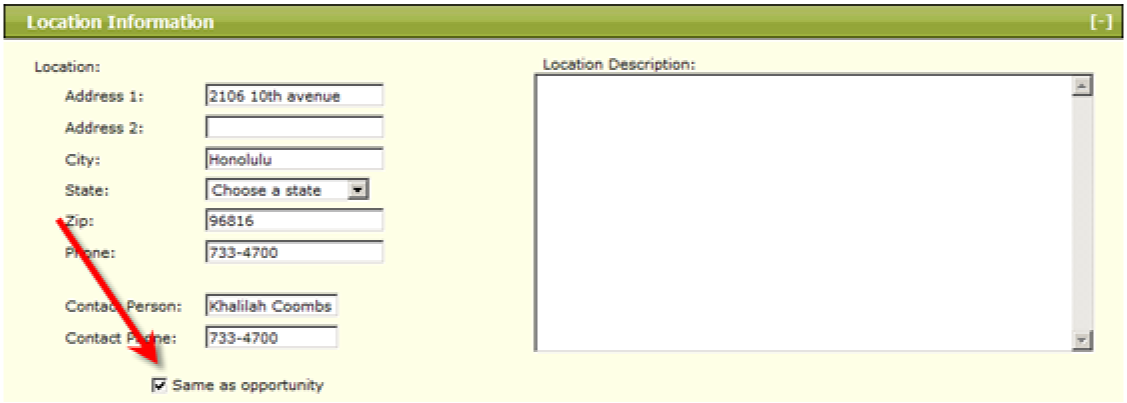
Opportunity: Adopt A Beach
Organization: Coyote Point Park
Any special message for volunteers? Over exposure to the sun causes cancer so, bring sunblock and wear a hat.

Messages appear on the volunteer schedules and when volunteers are at sign-in stations.

*Minimum volunteers needed 15
*Maximum volunteers allowed 15
Minimum clients needed
Maximum clients allowed
Urgency Low

**Minimum & Maximum Volunteers:** Enter a minimum of one volunteer but a maximum that is equal to the number of people you are seeking *plus* an additional % in order to accommodate no-shows. The system will continue to post the schedule slot until the *maximum* number of volunteers request the slot.

**Step #6:** Location Information. Enter the address where this slot occurs, or select "Same as opportunity" when applicable.



Location:

Address 1: 2106 10th avenue

Address 2:

City: Honolulu

State: Choose a state

Zip: 96816

Phone: 733-4700

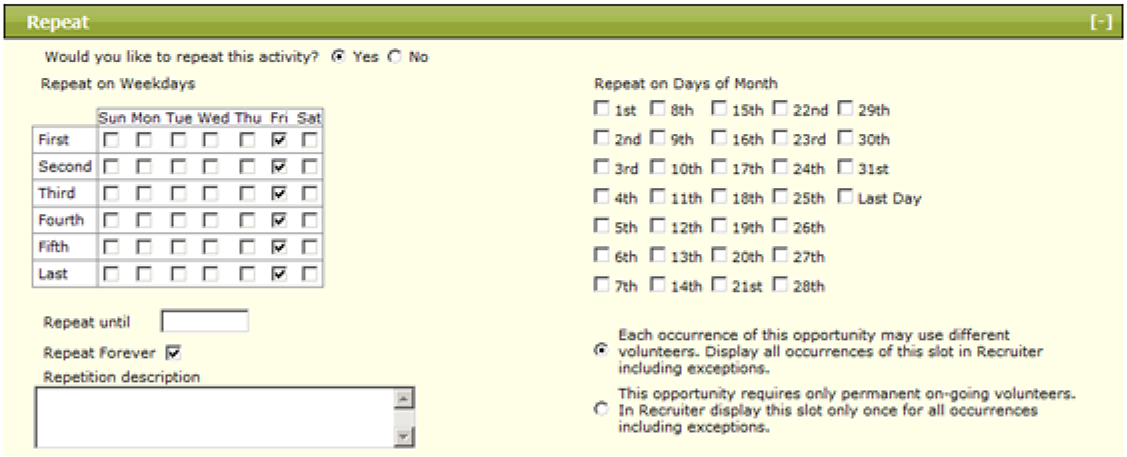
Contact Person: Khalilah Coombs

Contact Phone: 733-4700

☑ Same as opportunity

Location Description:

**Step #7:** Create a repeating pattern for your schedule slot (if needed). If you are creating the schedule for an opportunity that recurs (e.g., every Friday from 10 am until noon), please enter the pattern for the repetition in the check boxes provided. This will automatically create the slot on all future days you select in the pattern. The repetitions will continue until the “Repeat Until” date is reached.



Would you like to repeat this activity? ● Yes ○ No

Repeat on Weekdays

| | Sun | Mon | Tue | Wed | Thu | Fri | Sat |
|---|---|---|---|---|---|---|---|
| First | ☐ | ☐ | ☐ | ☐ | ☐ | ☑ | ☐ |
| Second | ☐ | ☐ | ☐ | ☐ | ☐ | ☑ | ☐ |
| Third | ☐ | ☐ | ☐ | ☐ | ☐ | ☑ | ☐ |
| Fourth | ☐ | ☐ | ☐ | ☐ | ☐ | ☑ | ☐ |
| Fifth | ☐ | ☐ | ☐ | ☐ | ☐ | ☑ | ☐ |
| Last | ☐ | ☐ | ☐ | ☐ | ☐ | ☑ | ☐ |

Repeat on Days of Month

| | | | | |
|---|---|---|---|---|
| ☐ 1st | ☐ 8th | ☐ 15th | ☐ 22nd | ☐ 29th |
| ☐ 2nd | ☐ 9th | ☐ 16th | ☐ 23rd | ☐ 30th |
| ☐ 3rd | ☐ 10th | ☐ 17th | ☐ 24th | ☐ 31st |
| ☐ 4th | ☐ 11th | ☐ 18th | ☐ 25th | ☐ Last Day |
| ☐ 5th | ☐ 12th | ☐ 19th | ☐ 26th | |
| ☐ 6th | ☐ 13th | ☐ 20th | ☐ 27th | |
| ☐ 7th | ☐ 14th | ☐ 21st | ☐ 28th | |

Repeat until

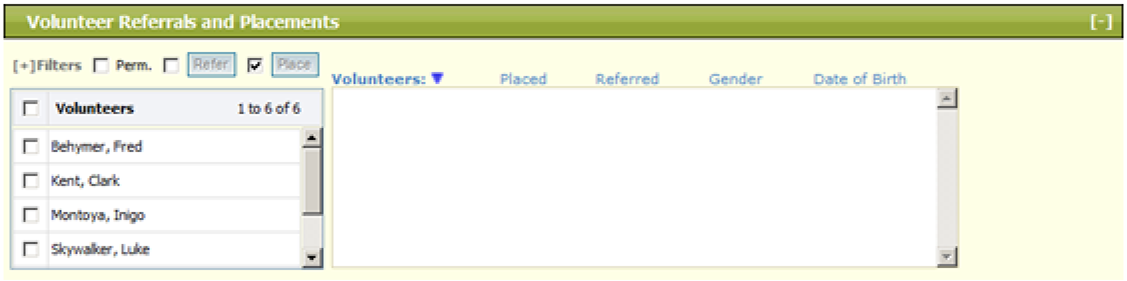
Repeat Forever ☑

Repetition description

● Each occurrence of this opportunity may use different volunteers. Display all occurrences of this slot in Recruiter including exceptions.

○ This opportunity requires only permanent on-going volunteers. In Recruiter display this slot only once for all occurrences including exceptions.

**Step #8:** Volunteer Referrals and Placements and Client Referrals and Placements. Drag and drop volunteers and clients whom you wish to request or assign to this slot.



☐ Perm. ☐ Refer ☑ Place

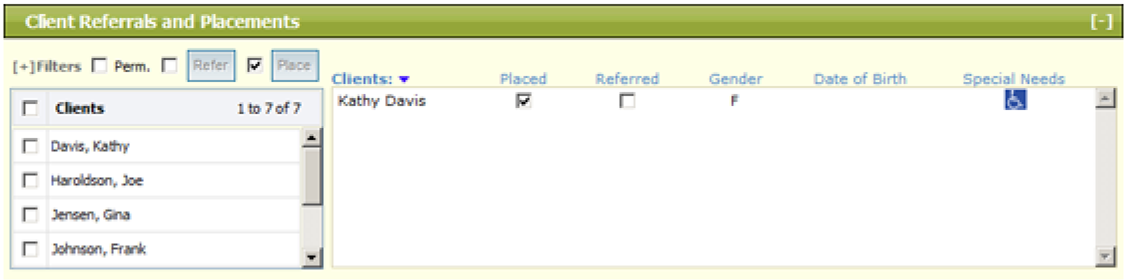
☐ Volunteers 1 to 6 of 6

☐ Behymer, Fred

☐ Kent, Clark

☐ Montoya, Inigo

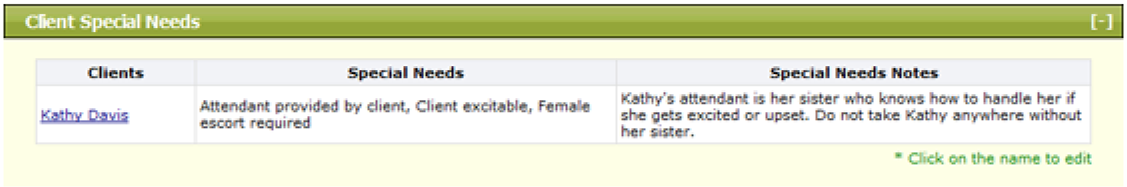
☐ Skywalker, Luke



| ☐ Clients | 1 to 7 of 7 |
|---|---|
| ☐ Davis, Kathy | |
| ☐ Haroldson, Joe | |
| ☐ Jensen, Gina | |
| ☐ Johnson, Frank | |

| Clients: | Placed | Referred | Gender | Date of Birth | Special Needs |
|---|---|---|---|---|---|
| Kathy Davis | ☑ | ☐ | F | | ♿ |

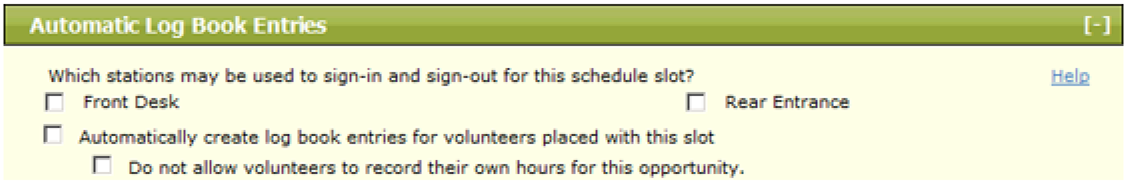
**Step #9:** Client Special Needs. If any clients who are placed with this schedule slot have any special needs as noted on their client profile, they will be listed here for you to see.



| Clients | Special Needs | Special Needs Notes |
|---|---|---|
| Kathy Davis | Attendant provided by client, Client excitable, Female escort required | Kathy's attendant is her sister who knows how to handle her if she gets excited or upset. Do not take Kathy anywhere without her sister. |

* Click on the name to edit

**Step #10:** Automatic Log Book Entries. Select the Sign-In station(s) from which volunteers may sign in/out for this slot, if applicable. Also, tell the system if you would like it to create an automatic log book entry for this slot, and if you would like to keep volunteers for entering their own hours.



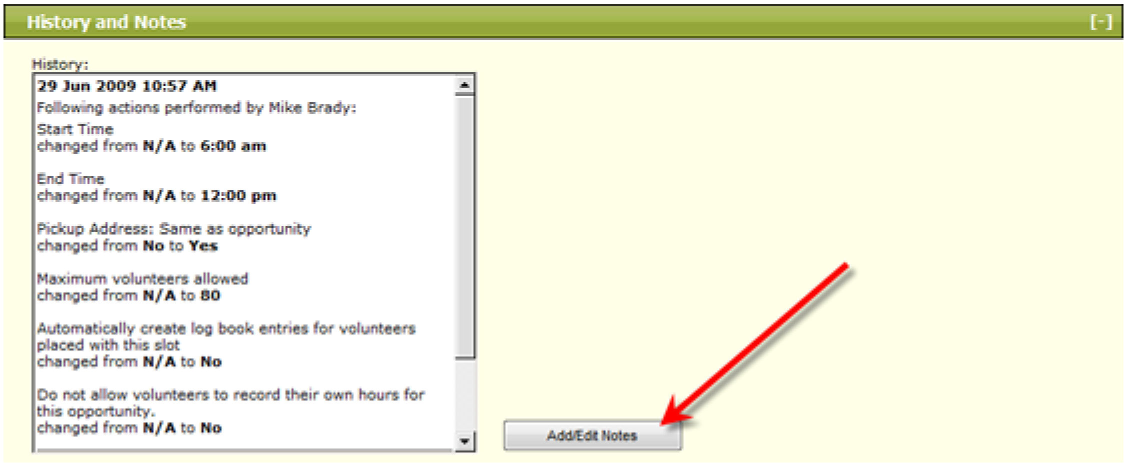
Which stations may be used to sign-in and sign-out for this schedule slot?

☐ Front Desk ☐ Rear Entrance

☐ Automatically create log book entries for volunteers placed with this slot

☐ Do not allow volunteers to record their own hours for this opportunity.

**Step #11:** History and Notes. This tab serves as an audit trail, detailing the date, time and name of actions taken by eCoordinator users. It documents when assignments have been made or unmade, and also allows users to enter their own notes with the "Add/Edit Notes" button.



History:

**29 Jun 2009 10:57 AM**

Following actions performed by Mike Brady:

Start Time
changed from **N/A** to **6:00 am**

End Time
changed from **N/A** to **12:00 pm**

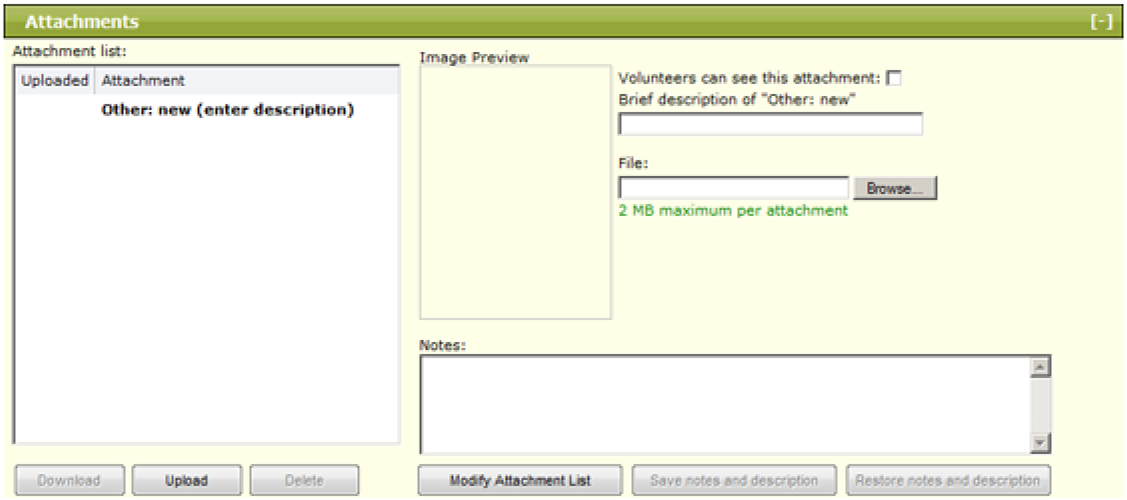
Pickup Address: Same as opportunity
changed from **No** to **Yes**

Maximum volunteers allowed
changed from **N/A** to **80**

Automatically create log book entries for volunteers placed with this slot
changed from **N/A** to **No**

Do not allow volunteers to record their own hours for this opportunity.
changed from **N/A** to **No**

**Step #12:** Attachments. Like the other profiles, the schedule slot profile has the ability to attach files, such as images, documents, etc. Use this tab to attach files, as well as enter notes about the attachments. Note: there is a 2MiB maximum limit for each file.


Attachments
[-]
Attachment list:
Uploaded
Attachment
Other: new (enter description)
Image Preview
Volunteers can see this attachment: ☐
Brief description of "Other: new"
File:
Browse...
2 MB maximum per attachment
Notes:
Download
Upload
Delete
Modify Attachment List
Save notes and description
Restore notes and description

**Step #13:** Click “OK”

You will now see your slot listed on the calendar with its description.

**Discussion:** When will repeated schedule slots most likely be used in your programs?

## 8.2 Scheduling Part 1 Practice

**P**
**Practice**

Please select the service opportunity that you created earlier in the training and take the following actions:

**Practice Instructions:**

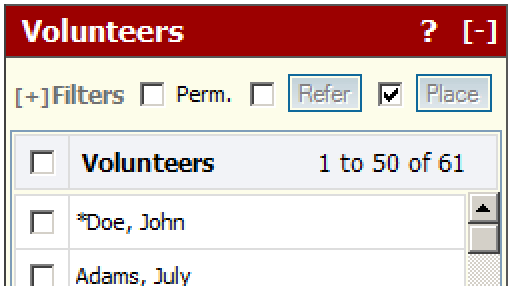
1. Select your opportunity on the opportunity tab
2. Click the Calendar button
3. Select, drag and drop your opportunity on to a calendar day
4. Complete the schedule slot profile
5. For this practice, make set up a repeating schedule
6. Click "OK” and make sure your slot appeared on the calendar
7. Check future dates where the slot should also appear

## 8.3 Scheduling Demonstration Part 2

Demo

We will now continue to demonstrate the next steps you should take so please keep the calendar screen for your opportunity open.

**Step #13:** Placing Volunteers. This is just as simple as calendaring your service opportunities. Select the volunteer(s) you want to place in the schedule slot and drag them to the slot where it appears on the day you want the volunteer(s) scheduled. Notice that you can assign multiple volunteers simultaneously. You must select the “Place” checkbox at the top of the volunteer window before you drag the volunteer to the slot. *If you would like to assign the volunteer to ALL upcoming instances of the slot, click the “Perm” checkbox as well as the “Place” checkbox*.



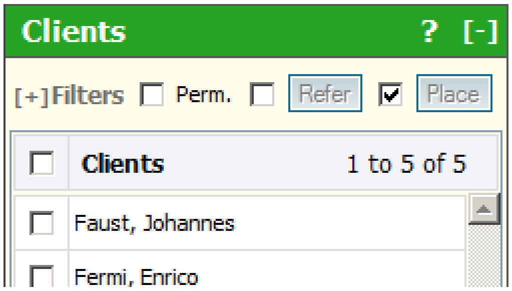
☐ Perm. ☐ Refer ☑ Place

☐ Volunteers 1 to 50 of 61

☐ *Doe, John

☐ Adams, July

**Step #14:** Placing Clients. This is just as simple as calendaring your service opportunities. Select the volunteer(s) you want to place in the schedule slot and drag them to the slot where it appears on the day you want the volunteer(s) scheduled. Notice that you can assign multiple volunteers simultaneously. You must select the “Place” checkbox at the top of the volunteer window before you drag the volunteer to the slot. *If you would like to assign the volunteer to ALL upcoming instances of the slot, click the “Perm” checkbox as well as the “Place” checkbox*.



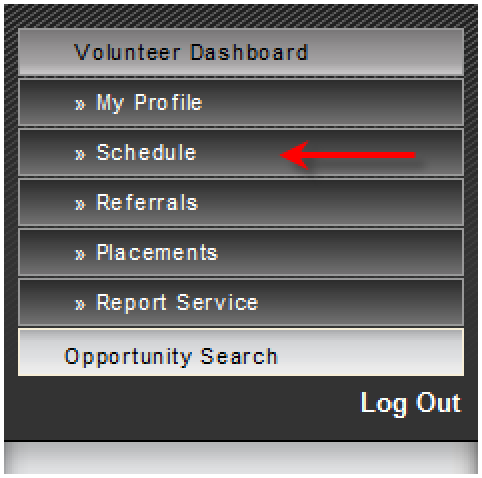
☐ Perm. ☐ Refer ☑ Place

☐ Clients 1 to 5 of 5

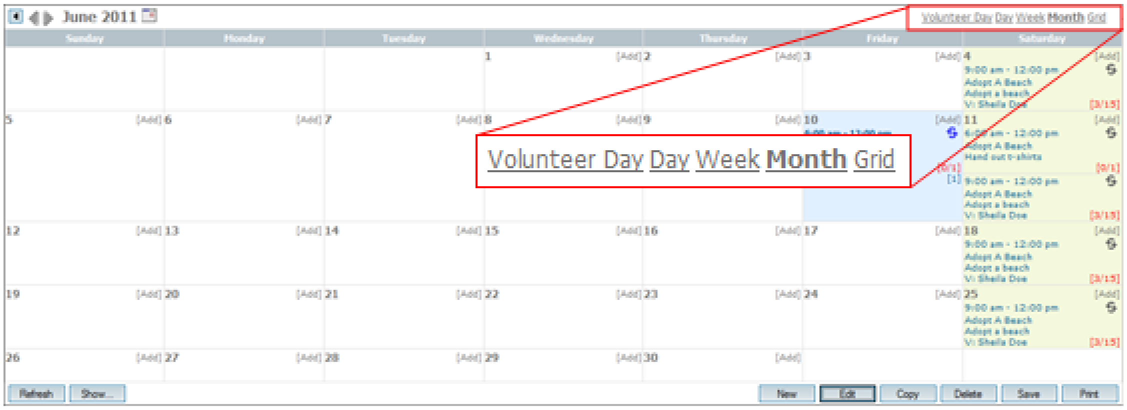
☐ Faust, Johannes

☐ Fermi, Enrico

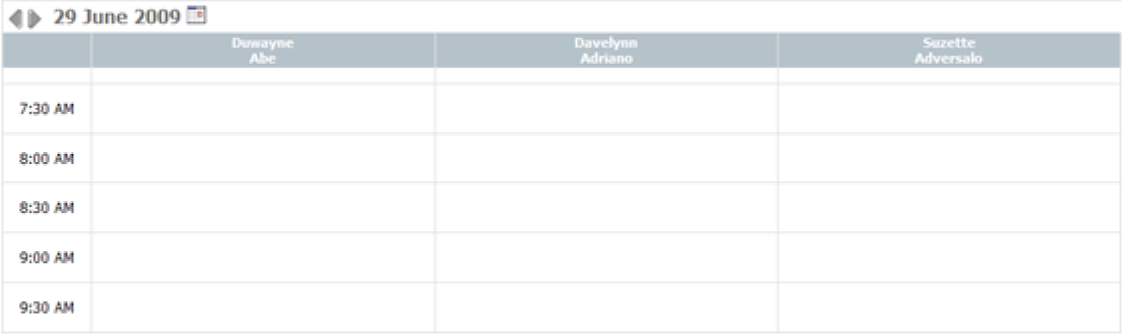
**Step #15:** Click “Close.” Your volunteers will now be able to view their personal service schedules on the eRecruiter when they click the link for “My Schedule.” You can also print reports that show your schedule slots from the Report All menu. Finally, you can select any volunteer from the Volunteers Tab and see their schedule yourself by clicking the scheduling button.


Volunteer Dashboard
» My Profile
» Schedule
» Referrals
» Placements
» Report Service
Opportunity Search
Log Out

### Additional Calendar Views:


June 2011
Sunday
Monday
Tuesday
Wednesday
Thursday
Friday
Saturday
Volunteer Day Day Week Month Grid
9:00 am - 12:00 pm
Adopt A Beach
Adopt a beach
V: Sheila Doe
Refresh
Show...
New
Edit
Copy
Delete
Save
Print

Once you have completed all of the steps mentioned above you can take a minute to review how your new schedule appears in various “views”. The view links are in the top right corner of the calendar screen. There are views for Day, Week, Month and a special view for “Volunteer Day” which allows you to compare schedules for selected volunteers side-by-side so you can see who might be available for a new schedule, see below:


29 June 2009
Duwayne Abe
Davelynn Adriano
Suzette Adversalo
7:30 AM
8:00 AM
8:30 AM
9:00 AM
9:30 AM

## 8.4 Scheduling Part 2 Practice

Please complete our scheduling practice by doing the following.

**Practice Instructions:**

1. Assign one volunteer to a slot you created
2. Assign two clients to the same slot
3. Assign one volunteer to a repeating slot (permanent)
4. Assign more than one volunteer to a single slot
5. Review the different “views” you see for the calendar
6. Close the calendar and launch the “Schedule Slot Placement Report” from the “Report All” menu
7. Go to the Volunteers Tab, select a volunteer, and review their upcoming schedule, if any

## 8.5 Scheduling Review

Please answer the following questions.

**My Personal Review:**

1. How do you attach an opportunity to a certain date?

   ________________________________________

   ________________________________________

2. What methods are there for narrowing the number of opportunities, volunteers, or clients that are displayed on the calendar screen?

   ________________________________________

   ________________________________________

3. How do you assign a volunteer to a set of repeating schedule slots?

______________________________

______________________________

______________________________

______________________________

**Answer Key:**

1. From inside the scheduling system, drag and drop the opportunity to the date you want on the calendar.
2. De-select volunteer, opportunity or client records from the left hand area, or select fewer records when accessing the scheduling system from the main grids.
3. After the repeating slots are created, select the volunteer(s) from their window on the left of the calendar screen, select the “Place” checkbox at the top of the volunteer window, and drag the volunteer to the repeating slot on the calendar.

## Part IX

# Log Book System

# 9 Log Book System

I
Intro

The Log book is where you can keep all of the information that you gather from volunteers. There are separate log books for clients, volunteers, opportunities and organizations, but *they all view the same data from different points of view.*

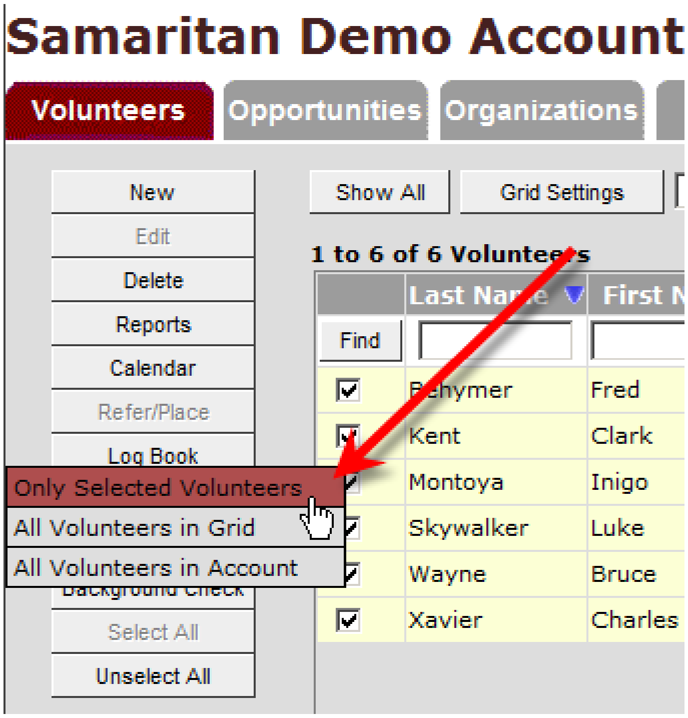
In the log books, you can:

- Activate columns for each data field from the survey
- Set up grids to show the data you need
- Use the “Approve” button to approve one or more entries
- Use the Report button to export data to .txt format and then import into a spreadsheet

## 9.1 Log Book Demonstration

D
Demo

**Step #1:** Accessing Volunteer Log Book


Samaritan Demo Account
Volunteers
Opportunities
Organizations
New
Edit
Delete
Reports
Calendar
Refer/Place
Log Book
Only Selected Volunteers
All Volunteers in Grid
All Volunteers in Account
Background Check
Select All
Unselect All
Show All
Grid Settings
Find

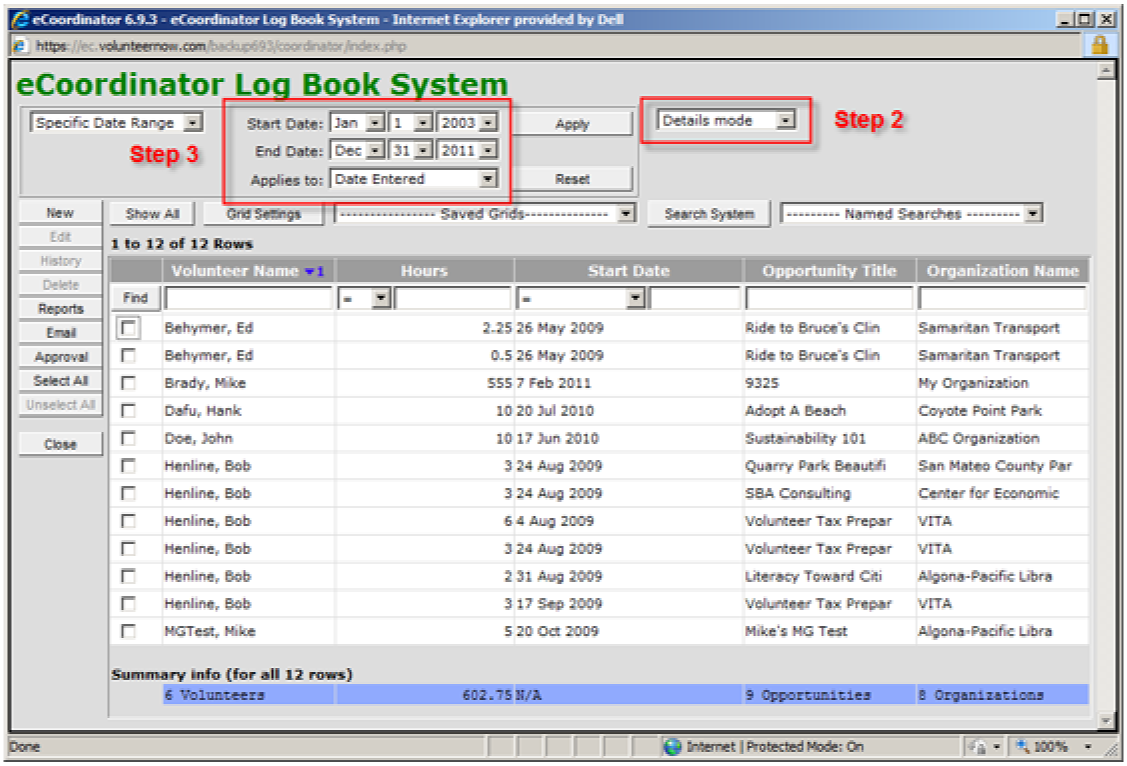
1 to 6 of 6 Volunteers

| | Last Name | First N |
|---|---|---|
| ☑ | Behymer | Fred |
| ☑ | Kent | Clark |
| ☑ | Montoya | Inigo |
| ☑ | Skywalker | Luke |
| ☑ | Wayne | Bruce |
| ☑ | Xavier | Charles |

- Make sure the “Volunteers” tab is selected and then select any volunteer(s)
- Click the “Log Book” button
- Select “Only Selected Volunteers” from the dropdown menu

**Step #2:** Summary or Details mode?

You can switch from Summary mode to Details mode to see all of the information available in this grid. Summary mode shows cumulative data for each volunteer such as the total number of hours they have served. Details mode breaks out individual records showing each entry made by or for a volunteer each time they served.


eCoordinator 6.9.3 - eCoordinator Log Book System - Internet Explorer provided by Dell
https://ec.volunteernow.com/backup693/coordinator/index.php
Apply
Reset
New
Edit
History
Delete
Reports
Email
Approval
Select All
Unselect All
Close
Show All
Grid Settings
------------------ Saved Grids---------------
Search System
---------- Named Searches ----------
Find
Done
Internet | Protected Mode: On
100%

eCoordinator Log Book System

Specific Date Range

Step 3

Start Date: Jan 1 2003
End Date: Dec 31 2011
Applies to: Date Entered

Details mode

Step 2

1 to 12 of 12 Rows

| | Volunteer Name | Hours | Start Date | Opportunity Title | Organization Name |
|---|---|---|---|---|---|
| ☐ | Behymer, Ed | 2.25 | 26 May 2009 | Ride to Bruce's Clin | Samaritan Transport |
| ☐ | Behymer, Ed | 0.5 | 26 May 2009 | Ride to Bruce's Clin | Samaritan Transport |
| ☐ | Brady, Mike | 555 | 7 Feb 2011 | 9325 | My Organization |
| ☐ | Dafu, Hank | 10 | 20 Jul 2010 | Adopt A Beach | Coyote Point Park |
| ☐ | Doe, John | 10 | 17 Jun 2010 | Sustainability 101 | ABC Organization |
| ☐ | Henline, Bob | 3 | 24 Aug 2009 | Quarry Park Beautifi | San Mateo County Par |
| ☐ | Henline, Bob | 3 | 24 Aug 2009 | SBA Consulting | Center for Economic |
| ☐ | Henline, Bob | 6 | 4 Aug 2009 | Volunteer Tax Prepar | VITA |
| ☐ | Henline, Bob | 3 | 24 Aug 2009 | Volunteer Tax Prepar | VITA |
| ☐ | Henline, Bob | 2 | 31 Aug 2009 | Literacy Toward Citi | Algona-Pacific Libra |
| ☐ | Henline, Bob | 3 | 17 Sep 2009 | Volunteer Tax Prepar | VITA |
| ☐ | MGTest, Mike | 5 | 20 Oct 2009 | Mike's MG Test | Algona-Pacific Libra |

Summary info (for all 12 rows)

| | Volunteer Name | Hours | Start Date | Opportunity Title | Organization Name |
|---|---|---|---|---|---|
| | 6 Volunteers | 602.75 | N/A | 9 Opportunities | 8 Organizations |

**Step #3:** Select your date range

You can pick which dates to view records from by selecting them from the range pull down menus shown above. You can also use the pull down menu on the left to indicate whether these are relative or specific dates. Relative date options will provide you with the ability to select, for example, all records in the past month.

**Step #4:** Create or apply a grid (optional)

Log books all include the same type of grid setup and settings that are used in the main screens. You can therefore pre-sort records by various criteria after turning them on/off. Common uses for log book grids include the ability to view:

- Current month's recorded hours
- Entries that require approval
- Current year-to-date hours

## 9.2 Log Book Practice

**P**

**Practice**

Practice what you have learned by doing the following:

**Practice Instructions**

1. Access the volunteer log book
2. Select "Details" mode
3. Change the date range to show all records for this year
4. Create a grid that shows name, date and the number of hours served
5. Please remember to name the grid appropriately

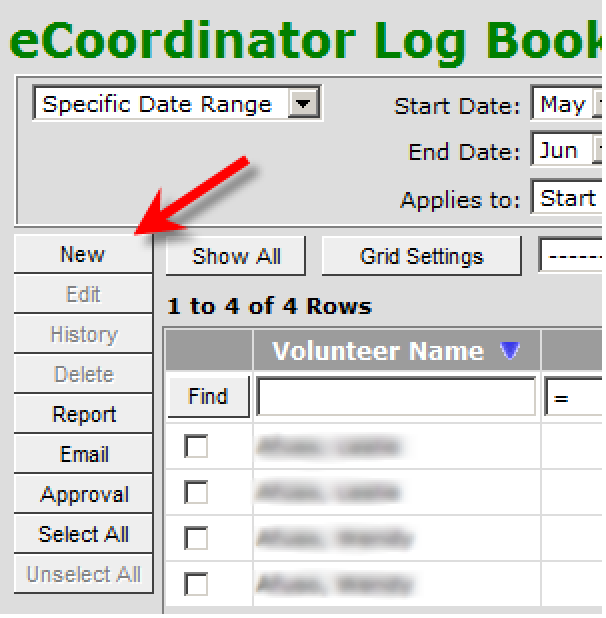
## 9.3 Log Book Data Entry Demonstration

Continue learning about logbooks by exploring some additional skills.

**Entering data for volunteers**

**Action:** Continue the demonstration by showing how to enter new log book entries.

In most cases, volunteers will enter their hours on eRecruiter. However, should you need to enter hours for them, please click the “New” button.



eCoordinator Log Book

Specific Date Range

Start Date: May

End Date: Jun

Applies to: Start

1 to 4 of 4 Rows

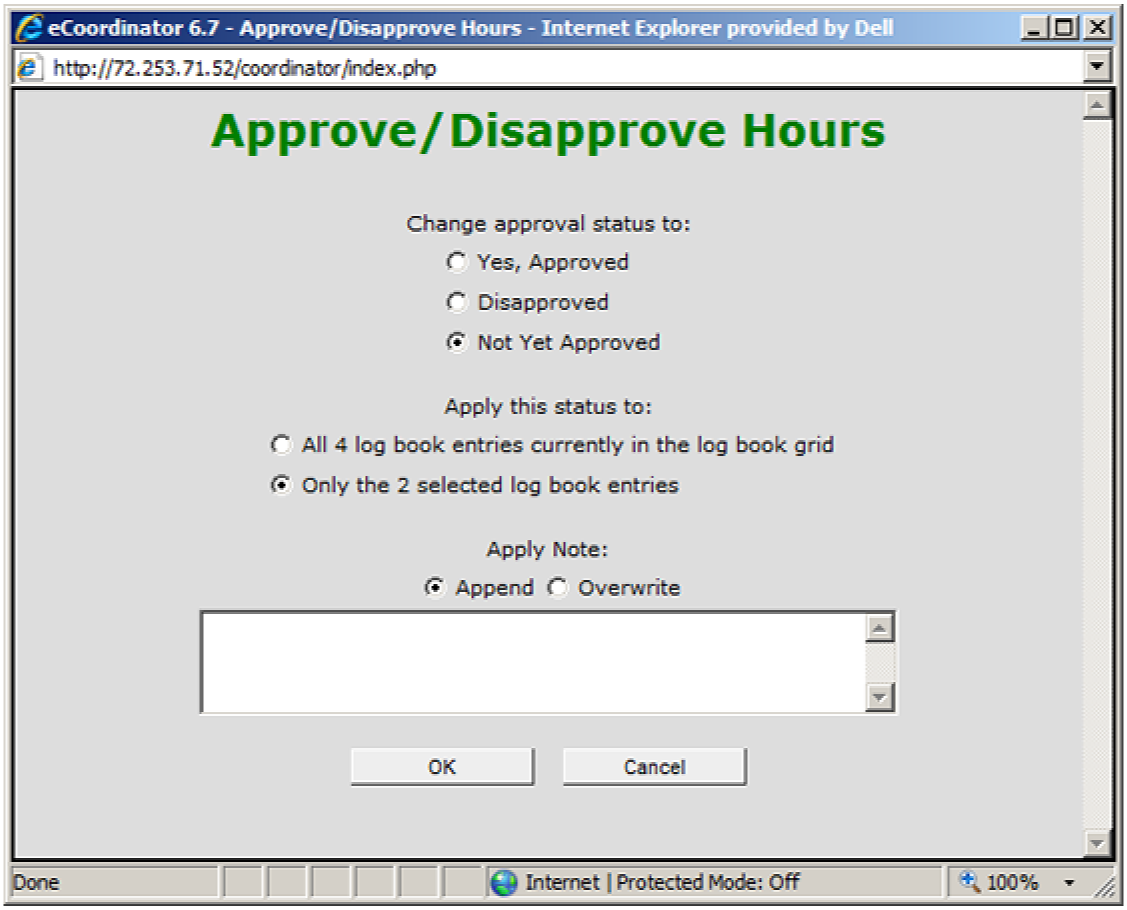
New
Edit
History
Delete
Report
Email
Approval
Select All
Unselect All
Show All
Grid Settings
Volunteer Name
Find
=

1. If you have not yet selected a volunteer, you will be shown a list of volunteers to pick from
2. This is followed by a list of opportunities that the selected volunteer is placed with
3. Finally, you will see a screen that allows you to enter the date and number of hours served

### Approve Entries

Many recognition programs require that volunteer hours must be verified and approved. Follow these steps to learn how. You must be in “Details” mode to approve.

1. Select any number of log book records and click the “Approve” button to get the record approval screen.
2. Indicate whether the record(s) are approved by you or not. You can approve all previously selected records simultaneously and append a note with information such as the method used for verifying the hours.



eCoordinator 6.7 - Approve/Disapprove Hours - Internet Explorer provided by Dell
http://72.253.71.52/coordinator/index.php
OK
Cancel
Done
Internet | Protected Mode: Off
100%

Approve/Disapprove Hours

Change approval status to:

○ Yes, Approved
○ Disapproved
● Not Yet Approved

Apply this status to:

○ All 4 log book entries currently in the log book grid
● Only the 2 selected log book entries

Apply Note:

● Append ○ Overwrite

## 9.4 Log Book Data Entry Practice

P

Practice

**Practice Instructions:**

1. Record new hours for a volunteer from the volunteer log book
2. Go to the opportunity log book and enter new hours for a volunteer from there (hint: click “New” button there too)
3. Return to the volunteer log book and approve the entries you have created during this practice

## 9.5 Log Book Review

**My Personal Review:**

1. How do you access the log book for a particular client?

   ____________________________________

2. What two modes can you view log book entries in?

   ____________________________________

   ____________________________________

3. How might you view only approved log book records?

   ____________________________________

   ____________________________________

4. If you wanted to view all entries for service opportunities that belong to your organization, what is the most efficient way to view them?

   ____________________________________

   ____________________________________

**Answer Key:**

1. By going to the Clients tab, clicking “Log Book” and then “Only Selected Clients”
2. Detail Mode or Summary Mode

3. Activate grid column “Approval Status” and do a column search for “Yes.” Note, if you search for “approved,” it will bring up the non-approved entries as well.
4. Go to the Organizations tab, select your organization, and click the “Log Book” button

## Part X

# Reporting System

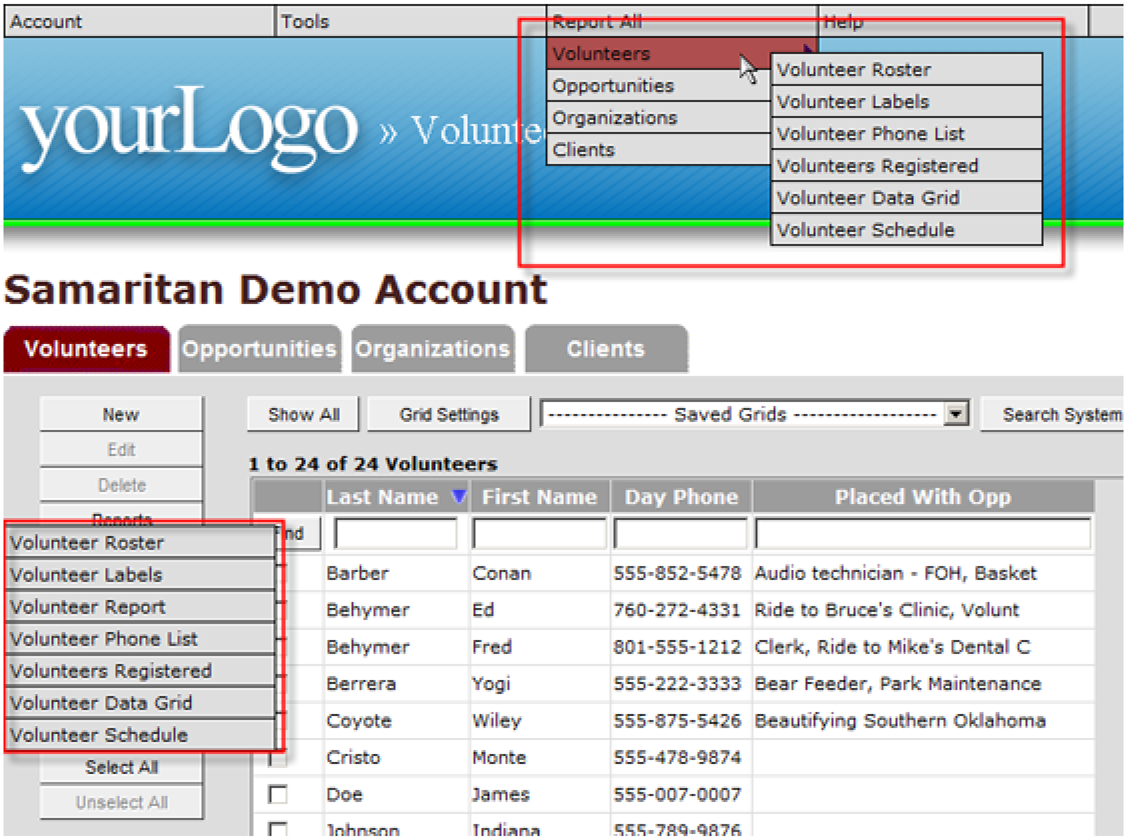
# 10 Reporting System

Intro

The eCoordinator program allows you to create and/or print a wide variety of reports automatically. There are multiple purposes for reports. These include generating statistical (logbook) reports, mailing labels, phone rosters and even exporting data from the system when needed.

There are two ways to access reports:

1. Select "Report All" from the menu bar and then select the report you need
2. Select "Reports" button next to the data grid from which you are working


Account
Tools
Report All
Help
Volunteers
Opportunities
Organizations
Clients
Volunteer Roster
Volunteer Labels
Volunteer Phone List
Volunteers Registered
Volunteer Data Grid
Volunteer Schedule
yourLogo » Volunte
Samaritan Demo Account
Volunteers
Opportunities
Organizations
Clients
New
Edit
Delete
Reports
Volunteer Roster
Volunteer Labels
Volunteer Report
Volunteer Phone List
Volunteers Registered
Volunteer Data Grid
Volunteer Schedule
Select All
Unselect All
Show All
Grid Settings
--------------- Saved Grids ------------------
Search System
Find

1 to 24 of 24 Volunteers

| Last Name | First Name | Day Phone | Placed With Opp |
|---|---|---|---|
| Barber | Conan | 555-852-5478 | Audio technician - FOH, Basket |
| Behymer | Ed | 760-272-4331 | Ride to Bruce's Clinic, Volunt |
| Behymer | Fred | 801-555-1212 | Clerk, Ride to Mike's Dental C |
| Berrera | Yogi | 555-222-3333 | Bear Feeder, Park Maintenance |
| Coyote | Wiley | 555-875-5426 | Beautifying Southern Oklahoma |
| Cristo | Monte | 555-478-9874 | |
| Doe | James | 555-007-0007 | |
| Johnson | Indiana | 555-789-9876 | |

**Why Different Ways to Access?**

The buttons on the left side are always for taking action on selected records inside the grid. The menu bar across the top is for "system-wide" actions. Therefore the "Report All" menu at the top will always pull report data from the entire database while reports created with the "Reports" button will use data solely from the current grid or records you select inside the grid.

## 10.1 Reporting Demonstration

“Report All” allows you to select a folder and run a report for **all** the records in that folder. You may also use your grids or pre-built searches to limit the records in a report.

If you run a report from the “Reports” button, you can choose to see either all the records in the current grid, or the records you selected prior to clicking “Reports.”

It is also noteworthy to mention that the same reports accessed from the "Reports" button on each tab are also accessible from the Log Book System from that same tab.

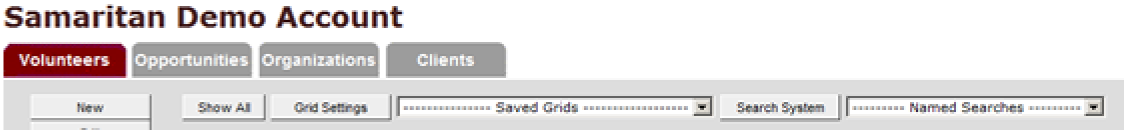
**Note: Adobe Acrobat Required.** Reports are generated in .pdf format, so the Acrobat Reader is required to view and/or print reports. It is available for free download from Adobe’s home page, a link to which is provided on the eCoordinator login screen.

Once you have selected the report, you will be asked to establish the parameters of that report.

### 10.1.1 Data Grid Reports

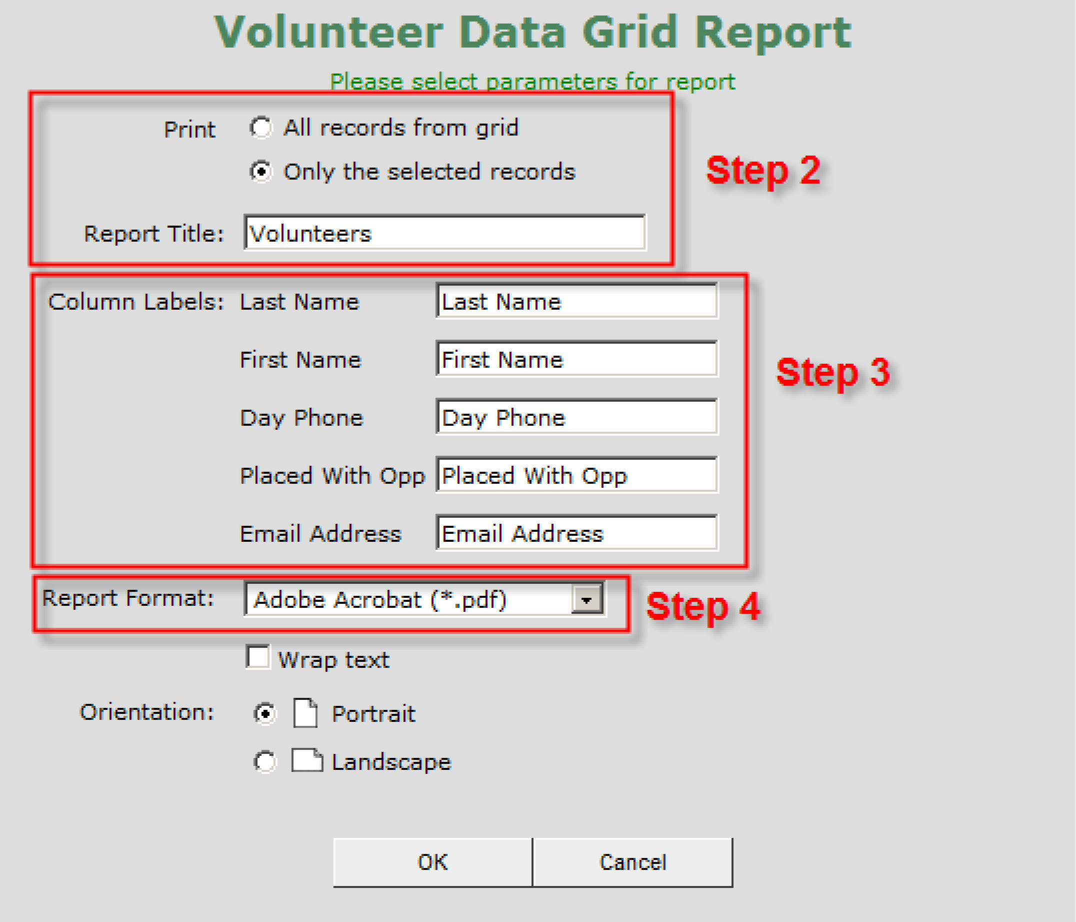
Data Grid Reports allow you to customize the information for your reports and print or export virtually every piece of data in the system. Because of this, there are restrictions on which users may be able to build the data grid report. If you do have access then open the “Data Grid Report” from the “Reports” button on the left side of the screen or from the “Report All” dropdown box at the top of the screen.

**Step #1:** Use your pre-built grids as well as searches and sorting to get the data you want for your report in to a main grid.



**Step #2:** Select your title and data source

Use the fields shown at the top of the setup screen to enter a title for your report and indicate whether you are building it for just the selected volunteers or "All Volunteers in Grid." If you select the latter, it will print or export all data in the current data grid regardless of whether or not said data is viewable. In other words, if your grid results show 400 volunteers but you can only see a maximum of 100, the report will still run on all 400.


Volunteer Data Grid Report

Please select parameters for report

Print ○ All records from grid
● Only the selected records

Report Title: Volunteers

Column Labels:
Last Name: Last Name
First Name: First Name
Day Phone: Day Phone
Placed With Opp: Placed With Opp
Email Address: Email Address

Report Format: Adobe Acrobat (*.pdf)

☐ Wrap text

Orientation: ● Portrait
○ Landscape

**Step #3:** Change column headers

You can change the headers that will appear in your printout or export file. This is usually done when you are exporting records to another software application that may require specific column titles before it will recognize data.

**Step #4: Selecting your output**

The pull down at the bottom of the screen allows you to indicate whether the data grid report will generate a .pdf file or a tab-delimited text (.txt) file. For this exercise, we will use the text (.txt) output option.

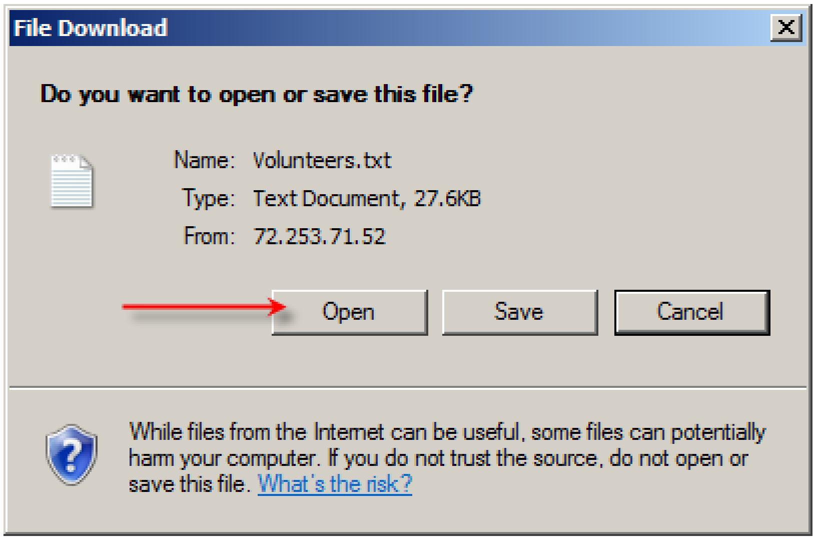
Note: Your computer will need to have a spreadsheet software for the next task to work (i.e., Open Office Spreadsheet, Microsoft Excel, etc.).

**Step #5:** Generate the text file

Click "OK."

A file will be downloaded to your computer. If you have any kind of pop-up blocking or other protective software running on your computer, you might receive a warning. When the file is ready for viewing, you will be given the option to "Open" or "Save" it. While you could save the file and then open it in another software application, we will show you how easy it is to work directly with text files.

Go ahead and click the “Open” button.

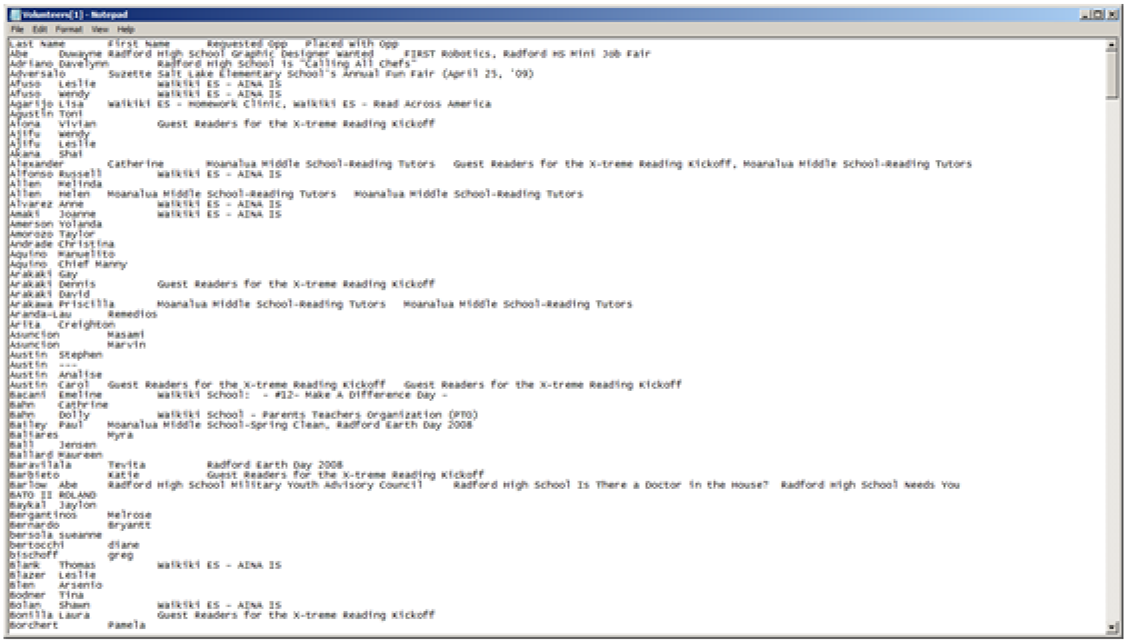


Do you want to open or save this file?

Name: Volunteers.txt
Type: Text Document, 27.6KB
From: 72.253.71.52

While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?

**Step #6:** Select and copy the data



```
Last Name       First Name      Requested Opp   Placed with Opp
Abe     Duwayne Radford High School Graphic Designer Wanted     FIRST Robotics, Radford HS Mini Job Fair
Adriano Davelynn                Radford High School is "Calling All Chefs"
Adversalo       Suzette Salt Lake Elementary School's Annual Fun Fair (April 25, '09)
Afuso   Leslie          Waikiki ES - AINA IS
Afuso   Wendy           Waikiki ES - AINA IS
Agarijo Lisa    Waikiki ES - Homework Clinic, Waikiki ES - Read Across America
Agustin Toni
Aiona   Vivian          Guest Readers for the X-treme Reading Kickoff
Ajifu   Wendy
Ajifu   Leslie
Akana   Shai
Alexander       Catherine       Moanalua Middle School-Reading Tutors   Guest Readers for the X-treme Reading Kickoff, Moanalua Middle School-Reading Tutors
Alfonso Russell         Waikiki ES - AINA IS
Allen   Melinda
Allen   Helen   Moanalua Middle School-Reading Tutors   Moanalua Middle School-Reading Tutors
Alvarez Anne            Waikiki ES - AINA IS
Amaki   Joanne          Waikiki ES - AINA IS
Amerson Yolanda
Amorozo Taylor
Andrade Christina
Aquino  Manuelito
Aquino  Chief Manny
Arakaki Gay
Arakaki Dennis          Guest Readers for the X-treme Reading Kickoff
Arakaki David
Arakawa Priscilla       Moanalua Middle School-Reading Tutors   Moanalua Middle School-Reading Tutors
Aranda-Lau      Remedios
Arita   Creighton
Asuncion        Masami
Asuncion        Marvin
Austin  Stephen
Austin  ---
Austin  Analise
Austin  Carol   Guest Readers for the X-treme Reading Kickoff   Guest Readers for the X-treme Reading Kickoff
Bacani  Emeline         Waikiki School:  - #12- Make A Difference Day -
Bahn    Cathrine
Bahn    Dolly           Waikiki School - Parents Teachers Organization (PTO)
Bailey  Paul    Moanalua Middle School-Spring Clean, Radford Earth Day 2008
Ballares        Myra
Ball    Jensen
Ballard Maureen
Baravilala      Tevita          Radford Earth Day 2008
Barbieto        Katie           Guest Readers for the X-treme Reading Kickoff
Barlow  Abe     Radford High School Military Youth Advisory Council     Radford High School Is There a Doctor in the House?  Radford High School Needs You
BATO II ROLAND
Baykal  Jaylon
Bergantinos     Melrose
Bernardo        Bryantt
Bersola Sueanne
Bertocchi       diane
Bischoff        greg
Blank   Thomas          Waikiki ES - AINA IS
Blazer  Leslie
Blen    Arsenio
Bodner  Tina
Bolan   Shawn           Waikiki ES - AINA IS
Bonilla Laura           Guest Readers for the X-treme Reading Kickoff
Borchert        Pamela
```

In the window that appears, do the following:

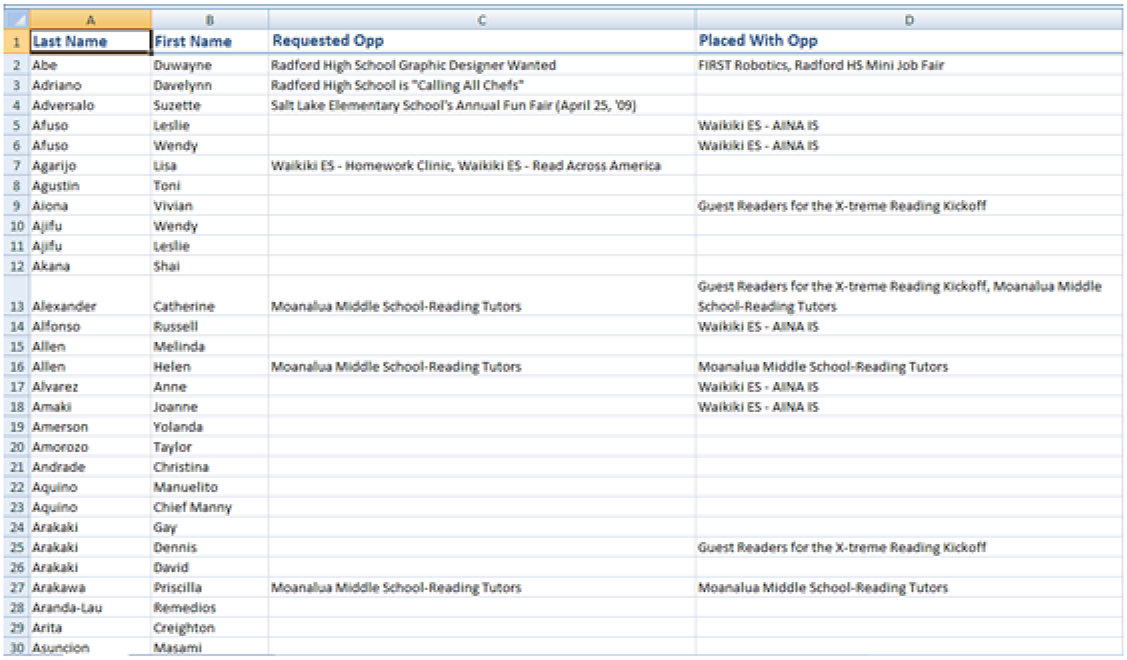
- Press “Ctrl + A” to SELECT ALL data in the window. All text should now be highlighted.

- Press “Ctrl + C” to COPY ALL data to your computer’s clipboard.

**Step #7:** Paste the data in to a spreadsheet

- Open your spreadsheet software
- Select the first cell (cell A1)
- Press “Ctrl + V” to PASTE ALL data

All of your data will paste into the separate rows and columns in the spreadsheet. You can then use your spreadsheet’s formatting options to change column width, change the cell background color, etc.



| | A | B | C | D |
|---|---|---|---|---|
| 1 | Last Name | First Name | Requested Opp | Placed With Opp |
| 2 | Abe | Duwayne | Radford High School Graphic Designer Wanted | FIRST Robotics, Radford HS Mini Job Fair |
| 3 | Adriano | Davelynn | Radford High School is "Calling All Chefs" | |
| 4 | Adversalo | Suzette | Salt Lake Elementary School's Annual Fun Fair (April 25, '09) | |
| 5 | Afuso | Leslie | | Waikiki ES - AINA IS |
| 6 | Afuso | Wendy | | Waikiki ES - AINA IS |
| 7 | Agarijo | Lisa | Waikiki ES - Homework Clinic, Waikiki ES - Read Across America | |
| 8 | Agustin | Toni | | |
| 9 | Aiona | Vivian | | Guest Readers for the X-treme Reading Kickoff |
| 10 | Ajifu | Wendy | | |
| 11 | Ajifu | Leslie | | |
| 12 | Akana | Shai | | |
| 13 | Alexander | Catherine | Moanalua Middle School-Reading Tutors | Guest Readers for the X-treme Reading Kickoff, Moanalua Middle School-Reading Tutors |
| 14 | Alfonso | Russell | | Waikiki ES - AINA IS |
| 15 | Allen | Melinda | | |
| 16 | Allen | Helen | Moanalua Middle School-Reading Tutors | Moanalua Middle School-Reading Tutors |
| 17 | Alvarez | Anne | | Waikiki ES - AINA IS |
| 18 | Amaki | Joanne | | Waikiki ES - AINA IS |
| 19 | Amerson | Yolanda | | |
| 20 | Amorozo | Taylor | | |
| 21 | Andrade | Christina | | |
| 22 | Aquino | Manuelito | | |
| 23 | Aquino | Chief Manny | | |
| 24 | Arakaki | Gay | | |
| 25 | Arakaki | Dennis | | Guest Readers for the X-treme Reading Kickoff |
| 26 | Arakaki | David | | |
| 27 | Arakawa | Priscilla | Moanalua Middle School-Reading Tutors | Moanalua Middle School-Reading Tutors |
| 28 | Aranda-Lau | Remedios | | |
| 29 | Arita | Creighton | | |
| 30 | Asuncion | Masami | | |

## 10.2 Reporting Practice

**Practice Instructions:**

1. Select a volunteer in the grid
2. Select a report
3. Customize the report options
4. Create a spreadsheet with the information from your report (Hint: data grid report)

## 10.3 Reporting Review

**My Personal Review:**

1. What two ways can you enter the reporting function?

____________________________________

____________________________________

2. What format do you use to export the data to use in another program?

____________________________________

**Answer Key:**

1. From the “Report All” menu, or clicking the “Reports” button
2. “.txt” or “text” format

## Part XI

# Conclusion

# 11 Conclusion

Congratulations!

You have completed the training on the Samaritan Technologies volunteer management system.

At this point, you should be able to perform the following tasks:

1. Data Entry: enter information for organization, opportunities, volunteers and clients into the database
2. Finding Data: grids and searches will help you sort through your data
3. Communication: post your opportunities online and email your volunteers
4. Matching: connect volunteers and clients with opportunities
5. Log books: collect hours and other information after service has been rendered
6. Reports: create reports based on the log books

Please note that this manual is designed to speak to a broader audience. Therefore, the terms you encounter throughout the course of this training will be the generic, or system default terms. For example, some of our customers prefer the term "participant" over "volunteer." Others may substitute "refer" and "place" with "request" and "assign." Due to the customizable nature of the system, trainers must help students identify the differences, and appropriate their dialogue accordingly. You may see items in this training that you have elected to turn off in your own system.

If you have any questions, comments, feedback or require any other assistance, please contact:

**Samaritan Technologies Customer Support***
Phone: 888-904-6060 option 4
Email: support@samaritan.com

*Office hours are Monday through Friday, 8:00 am-5:00 pm Mountain Time (Mountain Time Zone observes Daylight Saving Time).

This training has covered the basics for the eCoordinator and eRecruiter systems. However, the system includes additional functionality that you can learn more about in the User's Manual, as accessed from the Menu> Help> Help file. These include Sign-In, the Approver's System, Automatic Email Alerts, User Defined Fields, and Surveys, among others.

## Part XII

# Glossary

# 12 Glossary

## A

**account:** A summarization of database records in the form of volunteers, opportunities, and organizations. These records define a relationship and show how one affects another.

**active (status):** Referring to the status of buttons or tabs that have black titles or are in color, are accessible when in this state. If buttons are active, the title will be in a black font. If tabs are active, they will be in full color. Please refer to inactive (status) when either buttons or tabs appear to be grayed-out.

**address book (sharing):** Account(s) to which you want to share your volunteers, opportunities, or organizations. This function can be accessed through the "Share" button on the left of your screen or from the "Tools" drop down selection called "Share Records" on the menu bar. You must know the exact name of the organization that you want to share to/with.

**attribute(s):** A characteristic associated with volunteers, opportunities, or organizations. Attributes may be User Defined Fields. They are used to associate special characteristics with volunteers, opportunities, or organizations. For example, the opportunity of "assistant" will differ depending where the opportunity is being performed. A hospital might require an "assistant" to be immunized, while an elementary school might require an "assistant" to pass a drug and criminal background check.

## B / C

**bcc:** Blind carbon copy; sending a copy to another/other recipient(s) in addition to the original recipient. None of the recipients will know who else received copies of the email because the list of email addresses is not seen by the other recipients.

**cc:** Carbon copy; sending a copy to another/other recipient(s) in addition to the original recipient. All recipients will know who else received the email because a list of email addresses is listed.

**client:** Clients are the individuals who are receiving the service provided by the volunteers. Clients generally apply for help. If you assist clients and track their information, it would be worthwhile doing it in eCoordinator.

**comment (UDF Group Component):** An administrator may choose to use as few as one character on one row up to 50 characters that span over 50 rows. Many customers choose to use this UDF type to give instruction for another UDF. Users will see their work displayed in the work areas of any of the three tabs and then clicking the "Edit" button.

**creator info (logged data):** The person who created the entry. This data can be accessed through clicking the "Log Book" button and then the "Grid Settings" button.

**customize:** To make or alter to requested specifications.

## D

**data grid:** The first screen that is displayed after clicking on any of the three tabs.

**date (UDF Group Component):** A type of User Defined Field created and used to collect date information on any of the profiles.
default: A setting that remains in effect until changed.

**details mode:** This mode displays a detailed grid of volunteers, opportunities, and organizations. This grid function is accessible through all three tabs and then clicking the "Log Book" button.

**divider (UDF Group Component)**: A type of User Defined Field. A user may place a divider (a title with a horizontal rule) so groups of information will be easier to identify and read. Users will see their work displayed in the work areas of any of the three tabs and then clicking the "Edit" button.

**drop-down boxes:** Selections attached to the menu bar that runs along the top of the bar to help you navigate through eCoordinator™.

**drop-down list (UDF Group Component):** A type of User Defined Field. A user may add numerous choices for the user to select from and choose to make it a required. The user also has the option of making a default selection available. Users will see their work displayed in the work areas of any of the three tabs and then clicking the "Edit" button.

## E

**eCoordinator™ email:** A way of communicating with volunteers (Volunteers tab), opportunity contacts (Opportunities tab), and organization contacts (Organization tab) through one program.

**email (button):** Located on the left-side of your eCoordinator™ screen. This button is accessible from any of the three tabs.

**email mail merge field:** A Mail Merge Field that has the word "email" in it. Only this type of Mail Merge Field can be inserted into the "To", "From", "Cc", and "Bcc" fields.

**exclamation point (icon):** This icon means that another agency has transferred an opportunity that contains attributes (refer to attributes) that your organization does not currently use.

**export/exporting (reports):** To save data in a form that another program can read. This function can be accessed through the "Reports" button on the left side of your screen or through the "Report All" selection on the menu bar.

## F

**folder(s) (icon):** Just like the folders on your desktop, our folders help you keep track of different groups. Folders can be created, edited, and deleted from the Folder Manager.

**folder manager (button):** Allows users to create, edit, and delete folders. The folder manager can be accessed from any of the three tabs and it is located on the left side of your main information screen.

**from (field):** This field is accessible from the "Email prior to being initialized, the default email address is the email address of the account administrator that was setup from the "Account" menu bar, then selecting "Change User Information". This can be changed by typing in a different email address and then sending an email while using this address.

## G / H / I / J / K / L

**green (right-pointing) arrow:** Part of "Folder Manager", clicking this arrow will copy selected records to a folder.

**hypertext link/hyperlink:** A link to another location or file. It is activated by clicking on the highlighted word at a particular location on the screen.

**inactive (status):** Referring to the status of buttons or tabs that are grayed-out (or inactive), are inaccessible when in this state. If a button is inactive, check that only one record has been selected to be modified.

**Intelli-Match:** Please refer to profile matching.

**log book:** Is where we keep all of the information that we gather from volunteers and members of groups we may have created with our opportunities.

**log out:** Accessed from the menu bar, this action will log you out of the eCoordinator™ system and direct you to the login screen (or the URL of your choice).

**logged data:** Is data that can be tracked for later use. You can search for logged data with criteria from any of the three tabs and then clicking on the “Log Book” button. After clicking on the “Log Book” button and then selecting only the selected, all in the grid, or all in the account, click on the “Grid Settings” button to select the criteria. You can even save the grid for later use.

**long text (UDF Group Component):** A type of User Defined Field. A volunteer may want to enter a paragraph or two about an experience. The maximum number of characters a volunteer can type in this space is 2,500 characters. Users will see their work displayed in the work areas of any of the three tabs and then clicking the "Edit" button. Be aware that if you choose to use this UDF type, you will not be able to display it in the data grid, search for strings within it, nor print it out in reports.

## M

**mail merge field:** Fields that can be inserted when using Email. These fields allow an administrator to automatically personalize large or small batches of emails. The Mail Merge Fields are accessible through "Email" and differ depending on the tab that the user is working from.

**main information screen:** The screen that displays the menu bar, all three tabs, buttons, and the folder manager.

**menu bar:** Runs along the top of your screen to help you navigate through eCoordinator™.

**modifiable:** Many of our screens and elements are now modifiable. Please contact a Customer Service to find out how we can better serve you.

**move left (button):** Used to move item(s) to the left. This button can be accessed when customizing grid settings and log book grid settings, or selecting functions: refer/place, scheduling, and sharing.

**move right (button):** Used to move item(s) to the right. This button can be accessed when customizing grid settings and log book grid settings, or selecting functions: refer/place, scheduling, and sharing.

## N

**named search:** Please refer to Search System (button).

**new (icon):** This icon is a notification reminder that the organization has received a volunteer, opportunity, or organization. It will appear on the data grid of the associating tab after the newly shared records notification has been displayed. This icon will disappear when the volunteer, opportunity, or organization is edited.

**newly shared records (notification):** This button can appear on any of the three tabs. If the button appears, you will see it between the "Unselect All" and "Folder Manager" buttons. Click on the button and a dialog box will display to let you know which volunteers, opportunities, or organizations were shared with you and who shared them with you. This notification can only be seen if your account is shared with other organizations.

**number (UDF component):** A type of User Defined Field created and used for the purpose of collecting data that is strictly numerical in value.

## O

**opportunity:** Service or activity that hasn't been performed yet. Opportunities are owned by Organizations. An opportunity can be scheduled by an account user. An account user can also match volunteers to opportunities or opportunities to volunteers using "Intelli-Match". Words that your organization might use instead of "opportunity": activities, events, jobs, positions, services, tasks, things to do, or work.

**Opportunity tab:** The place where you can create, edit, delete, schedule, report on, refer/place, log, email, and share opportunities. A user can also access the menu bar, saved grids, and named searches from this screen.

**Organization(s):** Words that your school might use instead of "organization": association, business, community, employer, establishment, non-governmental organization (NGO), non-profit organization (NPO), or organization.

**Organization tab:** The place where you can create, edit, delete, report on, refer/place, log, email, and share organizations. A user can also access the menu bar, saved grids, and named searches from this screen.

**ownership:** Volunteers cannot be owned by opportunities or organizations. Opportunities are owned by Organizations. Organizations own Opportunities.

## P / Q

**password:** Must be at least six characters and the characters are case-sensitive. Also, although the password is not required to be unique, we discourage users and volunteers from creating easy passwords such as a person's name, phone number, or date of birth because this information may be capable of being guessed by others.

**place/placement:** Describes three types of placements (not temporary): 1) an opportunity to a volunteer; 2) a volunteer to an opportunity; 3) a volunteer to a organization. These actions are performed by the account administrator. The "Refer/Place" button can be accessed from all 3 tabs.

**profile:** A record of a volunteer, opportunity, or an organizaton. Synonymous with record.

**profile matching:** Accessed from eRecruiter using your web browser, a volunteer can select the hypertext link called “Search Opportunities that Match My Profile” to see matches that match his/her profile. These matches are based on opportunities that have two or more traits in common with your volunteer profile.

**profile screen:** A common reference term referring to the screen with the gray tabs. This is also called the work area. This screen can be accessed by going to any one of the three tabs and then clicking "Edit."

## R

**record:** A profile of a volunteer, opportunity, or a organization. Synonymous with profile.

**eRecruiter™:** An online volunteer recruitment tool that maximizes the potential of your existing website and minimizes data re-entry. Customized to match an organizations web graphics, eRecruiter™ enables volunteers to submit registration information and search for opportunities matching their profiles.

**recycle bin (icon):** An icon meaning "delete". This icon can be found on the "Attachments" portion of the "Email" screen when an attachment has already been attached and on the scheduling screen when a calendar is displayed.

**red (left-pointing) arrow:** Part of "Folder Manager", clicking this arrow will remove selected records from a folder.

**referral:** Describes three types of temporary placements: 1) an opportunity to a volunteer; 2) a volunteer to an opportunity; 3) a volunteer to an organization. These actions are performed by the account administrator (or a Team Leader if the functionality has been enabled). The "Refer/Place" button can be accessed from all 3 tabs.

**Refer/Place (button):** Please refer to Refer and Place/Placement.

**reports (button):** Viewed only by Adobe's Acrobat Reader, there are several reports from each tab to choose from. Reports can be accessed through the menu bar or from a button on the left side of your screen. Please see Reports for more information.

**right-click:** This refers to clicking the right button on the mouse and releasing it. In Microsoft Windows, the right mouse button lets you view the properties of a file, folder or other object.

## S

**Samaritan Customer Service:** Can be reached toll-free at (888) 904-6060 x 208 or by email at support@samaritan.com. Please contact a Customer Service if you need more information about eCoordinator™.

**schedules/scheduling:** An action accessed from the Calendar button. Allows creation of schedule slots for opportunities.

**screens with the gray tabs:** A common reference term referring to the profile screen. This is also called the work area. This screen can be accessed by going to any one of the three tabs and then clicking "Edit".

**Search System (button):** A search that allows the user to create searches with up to five (5) criteria and then save the search as a "Named Search." This button is accessed through the main window of all three (3) tabs (i.e. Volunteers, Opportunities, and Organizations).

**secure logo:** A logo that is secured by secure sockets layer (SSL). This ensures secure transport of your logo between your web site and your browser. The point is to have secure transport of all transactions made between your web site and browser. If everything is secure, you'll see an icon of a lock on the bottom right of your screen. If your logo is not secure, a warning message will display that reads, “This page contains both secure and non-secure items. Do you want to display the non-secure items?” If your organization requires assistance with this, please contact a Customer Service to help your organization do this.

**Select All (button):** When clicked, this action will select all from the current data grid. If your grid settings are set to display only 15 records per page, then only 15 records will be selected when clicking "Select All".

**Share Records (button)/sharing records:** An action that allows one organization to share volunteer or opportunity records with another organization. In order for two or more organization to share, they must know each others' account names. The account names must be entered exactly as they appear in the title field of the other Organization's account.

**short-text (UDF Group Component):** A type of User Defined Field. A volunteer may want to enter a sentence or two about an experience. The maximum number of characters a volunteer can type in this space is 255 characters. Users will see their work displayed in the work areas of any of the three tabs and then clicking the "Edit" button.

**Sign-In (feature):** This feature is disabled until you ask to have it enabled. The Sign-In feature allows volunteers and coordinators to sign-in/out from the location that the service was performed. The “Sign-In Setup Options” can be accessed from the “Tools” menu bar and then choosing “Sign-In Setup Options”.

**Sign-In access:** Access is granted to volunteers and coordinators to sign-in/out of the stations as needed. This is based on station location. Volunteers and coordinators may only sign-in/out of stations that they have access to.

**Sign-In stations:** Stations or kiosks that volunteers and coordinators to sign-in/out of as they perform service. Sign-In stations are specific to the schedule slots of opportunities.

**standalone accounts:** Accounts that are neither shared nor depend on other accounts.

**summary mode:** This mode displays a simple grid of volunteers, opportunities, and organizations. This grid function is accessible through all three tabs and then clicking the "Log Book" button.

**survey group:** Is a group of people from whom you want to gather information. This feature is disabled by default. If you'd like to access it, please contact us.

**surveys:** Are setup through the Opportunities tab and is associated with a specific opportunity.

**T / U**

**”three tabs":** A common reference term used throughout the manual, it refers to the Volunteers, Opportunities, and Organizations tabs.
time (UDF Group Component): A type of User Defined Field.

**un-refer (button):** Action taken to remove a referral placed on an opportunity or a volunteer. This button can be accessed from either the "Opportunity Placement" or "Volunteer Placement" windows after clicking the "Refer/Place" button that is an option on all three tabs (i.e. Volunteers, Opportunities, and Organizations).

**uniform resource locator (URL):** An internet address (for example, http://www.samaritan.com)

**Unselect All (button):** When clicked, this action will deselect all from the current data grid. If your grid settings are set to display only 15 records per page, then only 15 records will be de-selected when clicking "Unselect All".

**User Defined Field (UDF):** A tab in the work area of all three tabs. This tab allows a user to gather data about each volunteer, opportunity, or organization that our fields don’t allow. As part of the process of moving through the tabs in the work area, the user can require a (potential) volunteer to answer specific questions. There are eight (8) types of fields that users can set up to gather information.

**user ID:** A unique username with at least six characters.

**V / W / X / Y / Z**

**Volunteer(s):** People who perform or offers to perform a service voluntarily. Volunteers are not owned by opportunities nor organizations, but can be scheduled to opportunities. An account user can also match volunteers to opportunities or opportunities to volunteers using "Intelli-Match". Words that your organization might use instead of "volunteer": assistant, charitable worker, employee, helper, service worker, or worker.

**Volunteer tab:** The place where you can create, edit, delete, report on, refer/place, log, and email volunteers. A user can also access the menu bar, saved grids, and named searches from this screen.

**work area:** A common reference term referring to the screen with the gray tabs. This is also called the profile screen. This screen can be accessed by going to any one of the three tabs and then clicking "Edit".

**“X” (Windows button):** Clicking this button instead of clicking "OK", "Next", or "Finish" will cause you to lose any data that was just entered. Always use the buttons within eCoordinator™ to navigate through the software.