ClubRunner

Volunteers Module Guide

Sep 2016

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Overview

If you’re planning on coordinating any sort of an event or program, you’re going to need a signup sheet. In today’s fast-paced digital world, people don’t want to go through the trouble of printing forms and filling them out manually. To get a good volunteer turnout to your event you need to rely on an online signup sheet. The Volunteers module gives you the ability to build your own signup lists for virtually any scenario where you need to coordinate people in various commitments organized by time, day, task, or group.

The module is good for managing for event shifts, volunteers, committee signups, or anything involving a schedule. No software to install**;** your signup sheet can be accessed from any browser -- anywhere on the internet**.** It’s easier for you and your visitors to use as well. Paper signups are messy and people don't fill out the information correctly or completely. The Volunteer module is online so everything is kept in one place, accessible by all. You can then download various reports, identify shortages, and even send out email reminders to everyone who has signed up**.**

Basic vs. Enhanced Versions

We’ve already included the essential features into the Basic version (included) to help you with managing casual signups. Upgrade to the enhanced version to get the additional features and increased capacity needed for more active users.

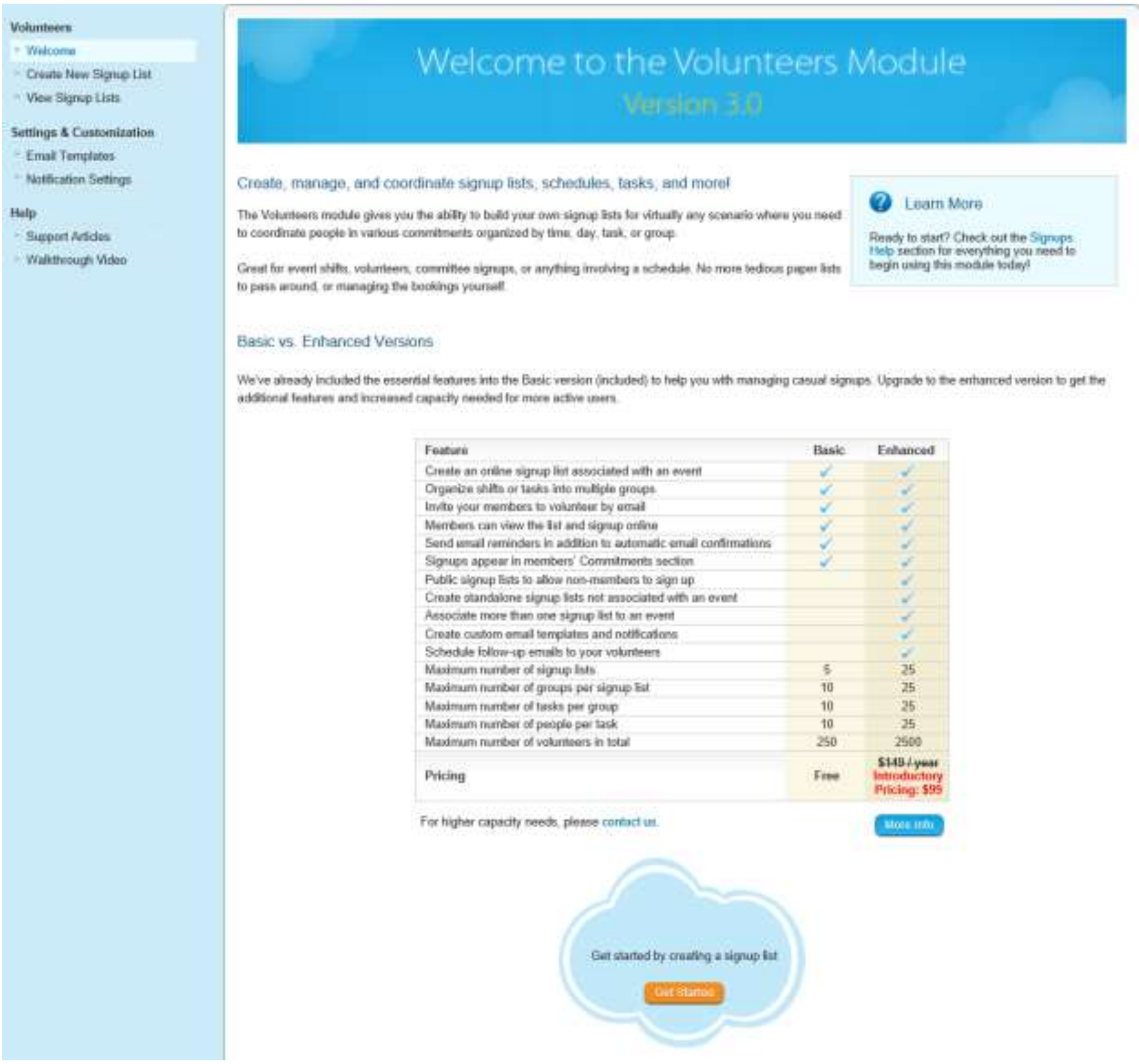
Navigation

Below are the steps on how to create a new Volunteer Signup Sheet:

Step 1: Login to your ClubRunner site and go to your Member area. Click on **Volunteers** on the grey menu bar near the top.

Step 2: Next click on the **Welcome** link.

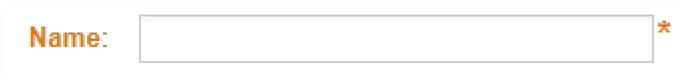
Step 3: You will be taken to the Volunteers Welcome page. From there, you can either click on the **Create New Signup** List link found on the upper left side or click on the **Get Started** button found in the middle of the page.



Create New Volunteer Signup List

***NOTE:** You cannot create a signup list for a draft event. An event must be active if you wish to create an associated signup list. Remember also that only the **Enhanced** version of this module can create standalone lists, or public signup lists that allow non-members to sign up.*

Step 1: Choose the **Name** of the Volunteer signup sheet. This is a required field.



Step 2: Next you have the option to select the Start Date and End Date (and times) for the when the Signup List is valid.

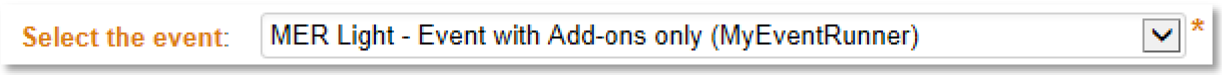
- Click on the calendar Icon: to bring up a mini calendar to select the dates.
- Click on the time icon: to set the time.

Step 3: Next is setting the access level for the Volunteer Signup List. Here you have two options:

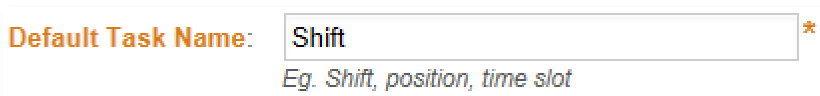
- **Public**: The Volunteer Signup List will be available to everyone, no need to login
- **Requires Login**: Only members will be able to sign up for the Volunteer Signup List

Step 4: Next is the **Link With An Event** field.

- If **NO** is selected then the Volunteer Signup List will not be associated with any kind of event. This function only works in the enhanced version of the Volunteer module.
- If **YES** is selected a new "Select the Event" drop down will appear. You will need to select an event (Either from Events 2.0 or My Event Runner) for this volunteer list.



Step 5: Setting the Task Defaults: First choose the Default Task Name. By default we populate this field with "Shift", however go ahead and enter what works best for you. (i.e.: Position, Time Slot, Shift, etc.)



Step 6: Next you will define:

Please note the* ***Basic* *version has a maximum of 10 groups per signup sheet, maximum of 10 Tasks per group, and a maximum of 10 people per task that can be created. The* ***Enhanced*** *version has a maximum of 25 groups per signup sheet, maximum of 25 Tasks per group, & a maximum of 25 people per task that can be created.*

- **No. of Groups:** How many groups will be created for each set of tasks defined.

  For Example:

- **No. of Tasks Per Group:** Defines how many tasks are associated with each group defined.

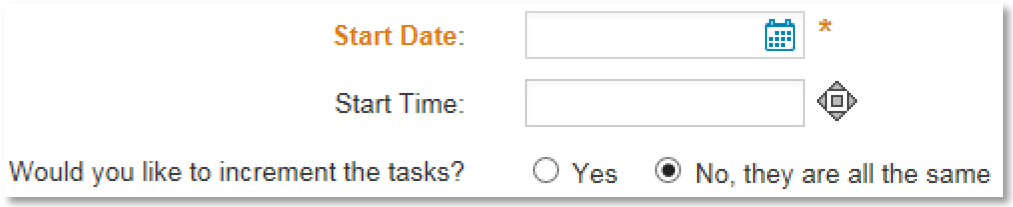
  For Example:

- **No. of People per Task:** Defines how many volunteers slots are available per task defined.

  For Example:

Step 7: Next is the "**Do the tasks have a start date or time?"** Field.

- If **NO** is selected then there will be no date or time associated with the Volunteer Signup List
- If **YES** is selected new fields will appear:



- **Start Date:** Defines the date when the task is effective. This is a required field.
- **Start Time:** Defines the time when the task should begin.
- **Would you like to increment the tasks?:** This feature has two options:
  - **NO they are all the same:** Will not create any new tasks
  - If **YES** is selected:

- **Increment the Tasks By:** Will increment the task Start based on the duration.
- **Duration:** Three options for duration – Days, Hours, & Minutes.

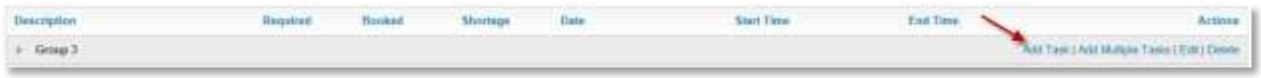
Step 8: Now click on the **Create Signup List** button found in the bottom right corner.

Manage Volunteer Tasks

The Manage Volunteer Tasks screen is where you would go to manage all of the tasks for the Volunteer Signup List. From here you can Add, Edit, or Delete any of the tasks. You also see the People per Tasks (Required column) and how many people have booked that task (Booked column).

To Add a New Task:

- Find the Group that you would like to add the task to and click on the **Add Task** link.



To Edit an Existing Task:

- Under the **Actions** column, click on the **Edit** link for any task that you would like to modify.

To Delete an Existing Task:

Under the Actions column, click on the Delete link for any task that you would like to delete.

To Add a New Group:

Step 1: Click on the 

button found in the top right corner.

Step 2: Choose a new Group Name. Note this is a required field.

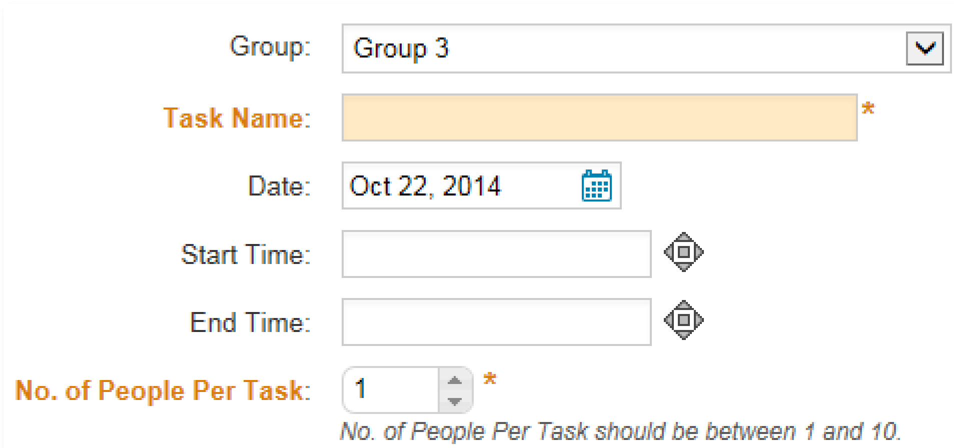
Step 3: Click on the 

button.

To Add a New Task:

Step 1: Click on the Add Task button in the top right corner.

Step 2: Populate the fields of the new task. Note **Task Name** & **Number of People** are required fields.



- **Group:** This is the group you want to add the task to. Click on the group dropdown to select a different group.
- **Task Name:** The name of the task being created.
- **Date:** The date that the task is effective.
- **Start Time:** *Optional* - Choose a time for when this new task should begin.
- **End Time:** *Optional* - Choose a time for when this new task should end.
- **Number of People:** How many volunteer slots are available for this task

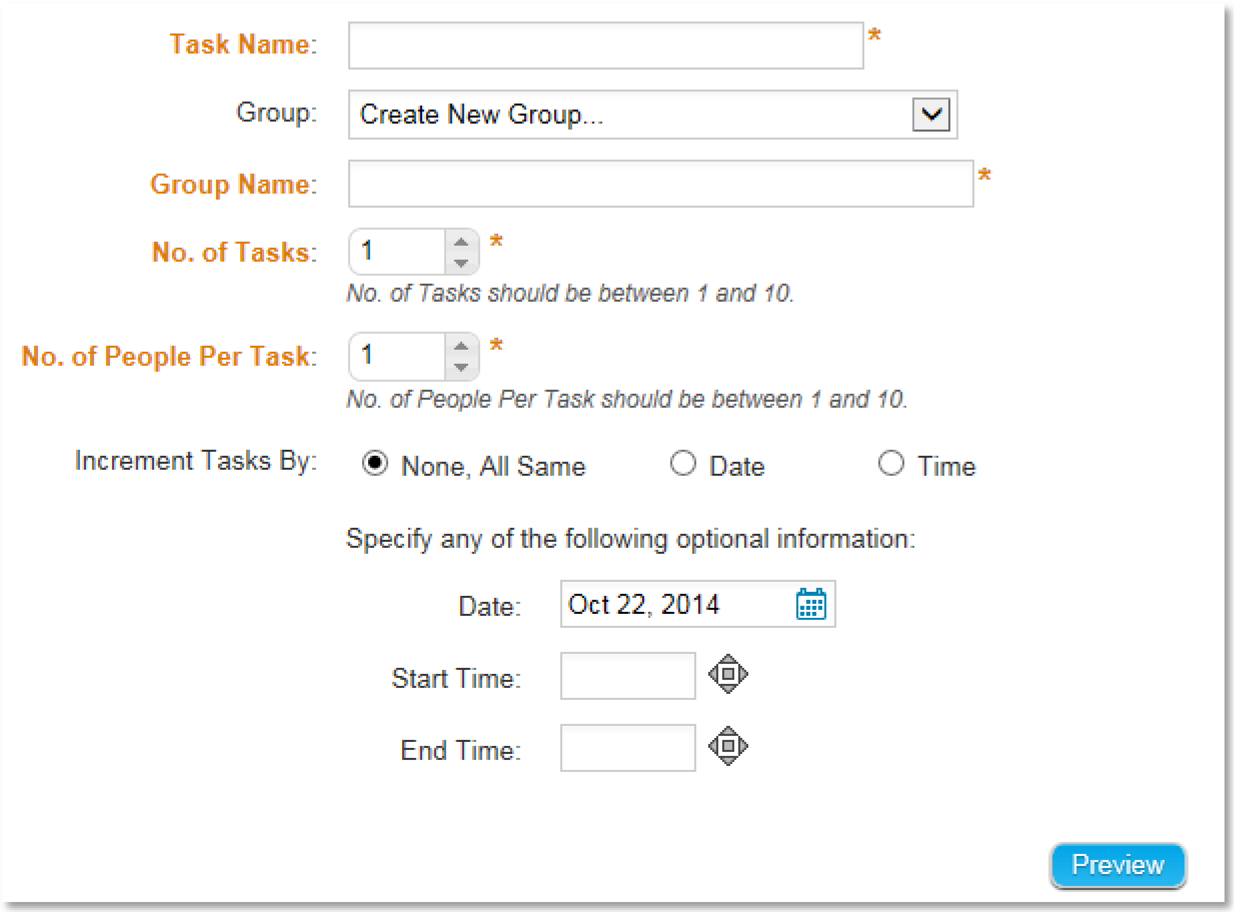
Step 3: Click on the Save button.

To Add Multiple Tasks:

Step 1: Click on the 

button in the top right corner.

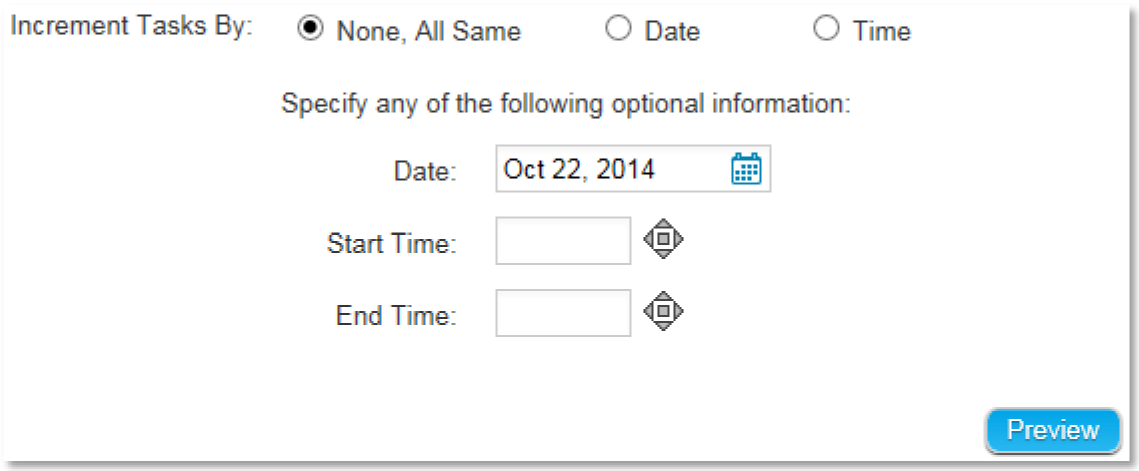
Step 2: Populate the fields for the Multi tasks. Note: **Task Name, Group Name, Number of Tasks, & Number of Volunteers per Task** are all required fields.



- **Task Name:** These are the names of the Multi Tasks being created.
- **Group:** The group that the tasks will be added to. If set on **Create New Group** then a new Group Name field will appear requiring you to populate the Group Name.
- **Group Name:** If Group is set to: Create New Group then this field will appear as a required field for you to enter a new Group Name.
- **Number of Tasks:** How many tasks will be created.
- **Number of Volunteers per Task:** How many volunteers’ slots are available per task defined.

Step 3: Increment Tasks By has three options, below are the details for each option:

Increment Tasks By: None, All Same



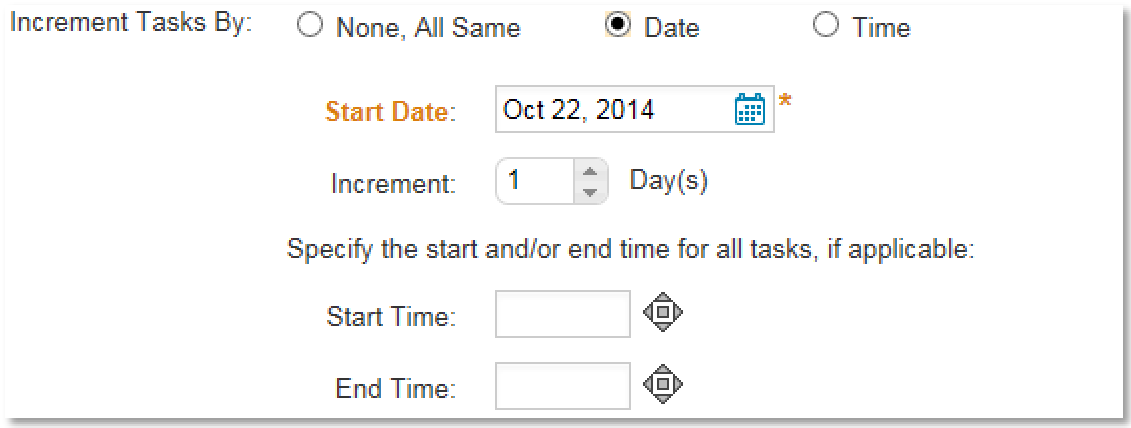
None, All Same: Indicates that the tasks being created do not need an increment as they will all be at the same date and time.

- **Date:** The date when the tasks will be held. Click on the calendar Icon: to bring up a mini calendar to select the date.
- **Start Time:** The time when the tasks will begin. Click on the time icon: to set the time.
- **End Time:** The time when the tasks will conclude. Click on the time icon: to set the time.
- **Preview:** Click on the Preview button to see a sample of the mutli tasks that will be created:

Task Name	Date	Start Time	End Time	No Of Volunteers
Drivers 1	Oct 22, 2014	3:19 PM	6:19 PM	1
Drivers 2	Oct 22, 2014	3:19 PM	6:19 PM	1
Drivers 3	Oct 22, 2014	3:19 PM	6:19 PM	1

If everything looks correct then simple click Save to save the multiple tasks.

Increment Tasks By: Date



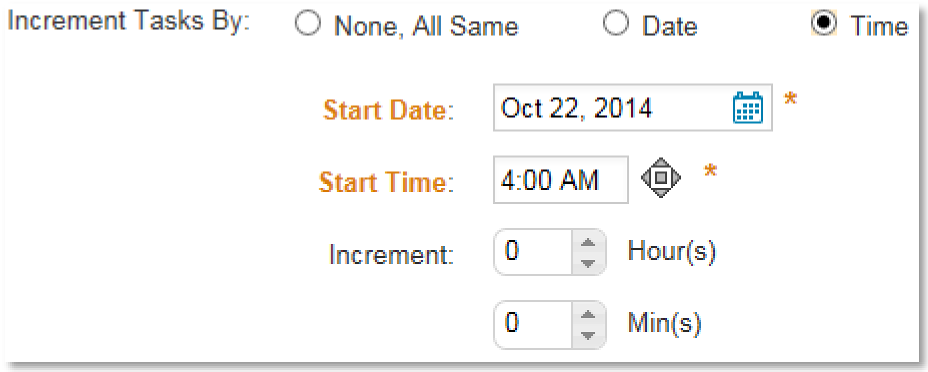
Date: Indicates that the tasks being created will increment based on days.

- **Start Date:** The first date when the first task will be held. All other task dates will be based on the increment field specified. Click on the calendar Icon: to bring up a mini calendar to select the date(s).
- **Increment:** The amount the Task Start Date will increase by.
- **Start Time:** The time when the tasks will begin, applicable to all tasks. Click on the time icon: to set the time.
- **End Time:** The time when the tasks will conclude, applicable to all tasks. Click on the time icon: to set the time.
- **Preview:** Click on the Preview button to see a sample of the mutli tasks that will be created:

Task Name	Date	Start Time	End Time	No Of Volunteers
Drivers 1	Oct 22, 2014	3:21 PM	5:21 PM	1
Drivers 2	Oct 23, 2014	3:21 PM	5:21 PM	1
Drivers 3	Oct 24, 2014	3:21 PM	5:21 PM	1

If everything looks correct then simple click Save to save the multiple tasks.

Increment Tasks By: Time



Time: Indicates that the tasks being created will increment based on Hour(s) and/or Minute(s).

- **Start Date:** The first date when the first task will be held. All other task dates will be based on the increment field specified. Click on the calendar Icon: to bring up a mini calendar to select the date(s).
- **Start Time:** The time of the first task. All other tasks will use the increment to determine their start times. Click on the time icon: to set the time.
- **Increment – Hour(s):** Indicates the amount of hours that will be added to the subsequent tasks.
- **Increment – Min(s):** Indicates the amount of minutes that will be added to the subsequent tasks.
- **Preview:** Click on the Preview button to see a sample of the mutli tasks that will be created:

Task Name	Date	Start Time	End Time	No Of Volunteers
Drivers 1	Oct 22, 2014	3:23 PM	4:23 PM	1
Drivers 2	Oct 22, 2014	4:23 PM	5:23 PM	1
Drivers 3	Oct 22, 2014	5:23 PM	6:23 PM	1

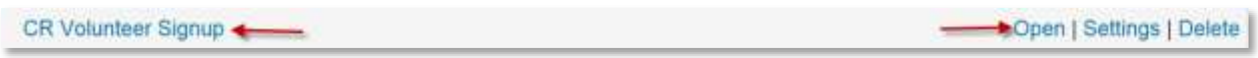
If everything looks correct then simple click Save to save the multiple tasks.

Manage Volunteer(s)

The Manage Volunteer screen is where you would go to add/remove volunteers per tasks.

Below are the steps to assign a Volunteer to a task:

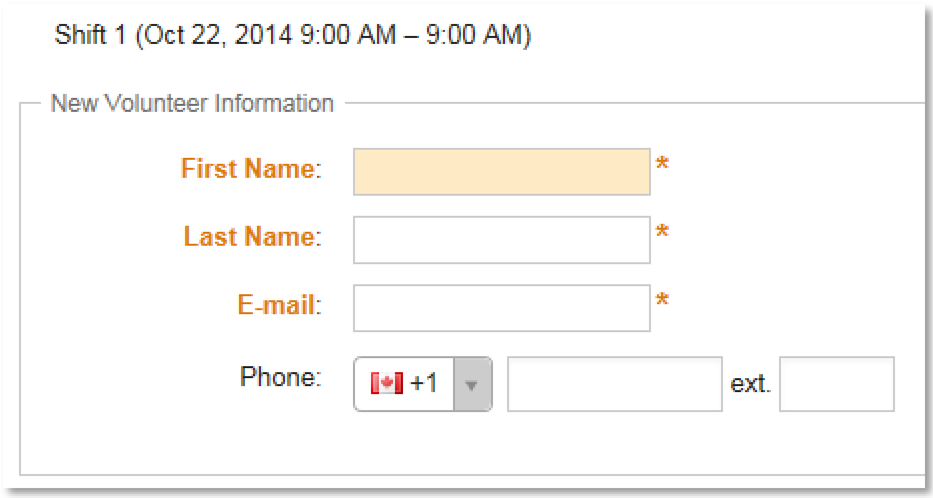
Step 1: Go to the View Signup Lists link and open your volunteer signup sheet.



Step 2: Next click on the **Manage Volunteers** button found in the top middle of the screen.

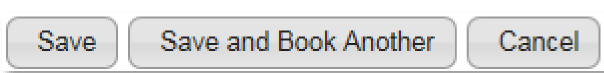
Step 3: Find the task that you want to define the volunteer for and click on 

Step 4: The Book Volunteer window should now open. Populate the fields for the volunteer. Note **First Name, Last Name, & E-mail** are all required fields.



- **First Name:** Enter the First Name of the Volunteer. An existing list of contacts will appear, if the volunteer is in the list then select them otherwise continue to add the volunteer.
- **Last Name:** Enter the Last Name of the Volunteer. An existing list of contacts will appear, if the volunteer is in the list then select them otherwise continue to add the volunteer.
- **E-mail:** Enter the Volunteers email address
- **Phone:** Enter the Volunteers phone number for contact purposes.
- **Ext.:** Include the extension if they have one.

Step 5: Once all of the fields are populated you have three choices:

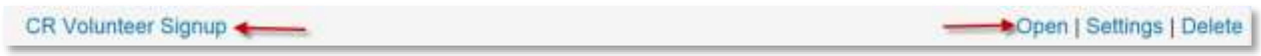


- **Save:** Will only save the one volunteer and takes you back to the Signup Page.
- **Save and Book Another:** Will save the volunteer information and keep you on the same screen for you to add another volunteer.
- **Cancel:** Will disregard the changes and not save anything.

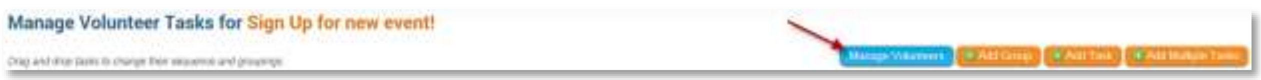
Once the volunteer has been booked, a confirmation email will be sent to the volunteer.

Below are the steps to unbook a Volunteer from a task:

Step 1: Go to the View Signup Lists link and open your volunteer signup sheet.

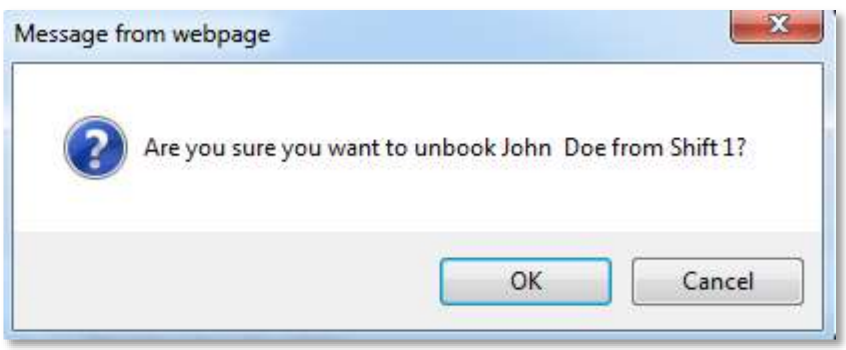


Step 2: Next click on the **Manage Volunteers** button found in the top middle of the screen.



Step 3: Find the task that you want to unbook the volunteer for:

Step 4: Now find the volunteer in that list and click on the ❌ icon. You should get a message box confirming that you want to unbook the Volunteer:



Step 5: Click **OK** to unbook the volunteer or click **Cancel** to disregard the changes.

Linking to an Event

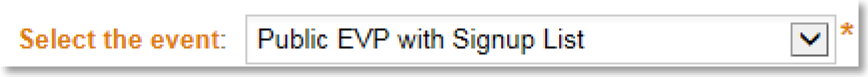
In order to see the Signup List in your ClubRunner site you will need to link it to an existing Event. *Please note the **Basic** version only allows you to associate one signup list to an event. The **Enhanced** version allows you to associate more than one signup list to an event and can create standalone signup lists not associated with an event!*

Below are the steps to link a signup list to an event:

1. Under the Volunteers section on the left side click on the **View Signup Lists** (link).

2. You should now see a list of your signup Volunteer signups, click on the **Settings** (link) found under the Actions column.

3. Now select the **Event** from the provided dropdown field.



4. Once the event has been selected click on the **Save** button to save the changes.

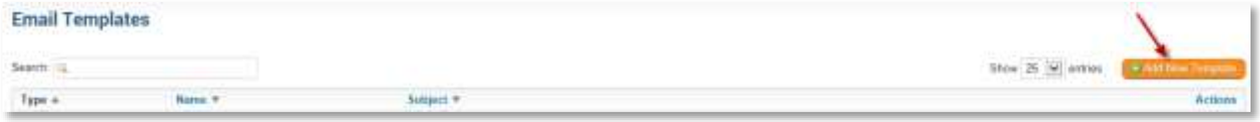
Email Templates

An ***Enhanced*** feature, Email Templates allows you to create a custom email template for sending members invitations to sign up. Note that there are system templates for each of the automated confirmation emails that can go out. You can preview these within this screen, but you cannot change them. If you wish to disable automated emails, see the next section, Notification Settings.

Below are the steps to create a new Email Template:

1. Under the **Settings & Customization** section on the left side click on the **Email Templates** (link).

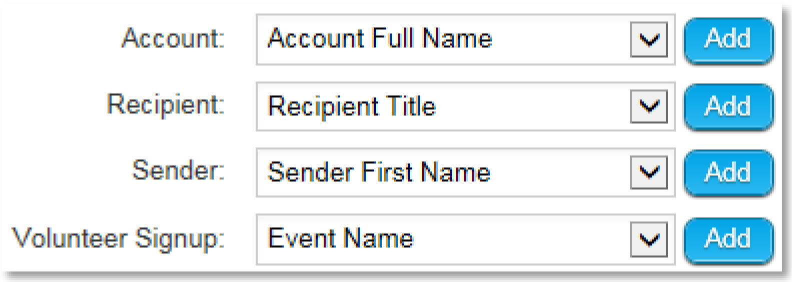
2. Next click on the **Add New Template** (button) found in the top right corner.



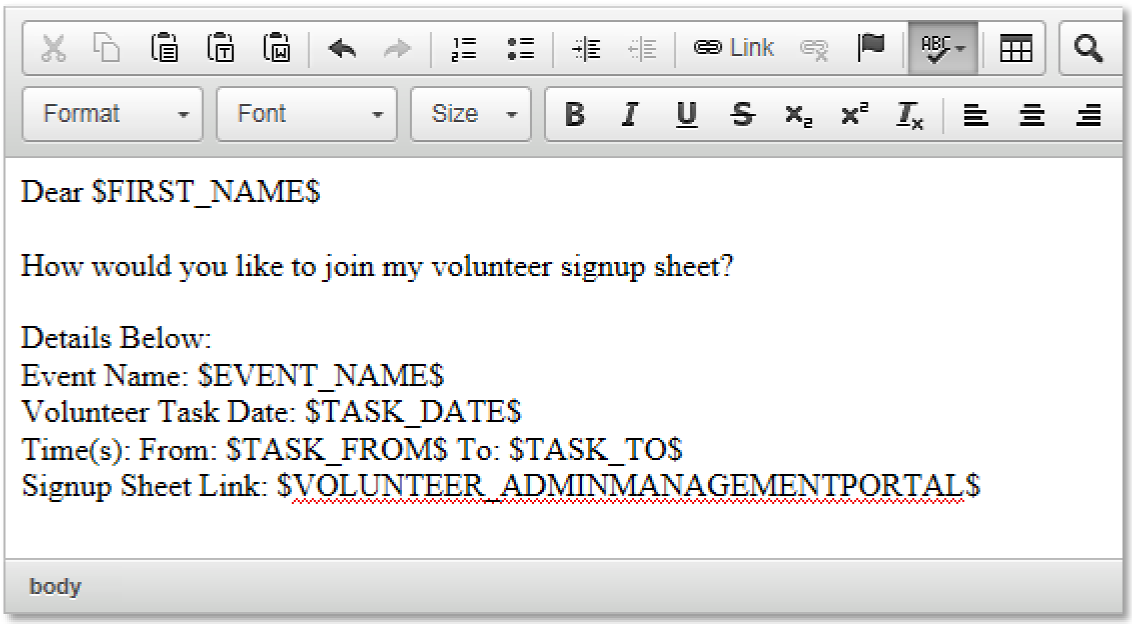
3. Now enter a **Name** for this Email template (required field). The **Subject** field is available but not a required field.

4. Next is creating the message using the Mail Merge Fields.

   The Mail Merge Fields act as place holders for the dynamic information. For example Sender First Name will send out the member's first name of whom is sending out the invitation to the members.



5. Scroll all the way down until you get to the editor. In the editor you can start to configure your message. Use the Mail Merge fields to reference the event or members.



6. Once your message is configured scroll to the bottom of the page and click on the **Save** (button).

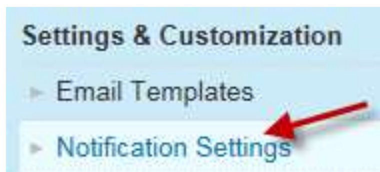
Notification Settings

An ***Enhanced*** feature, Notification Settings allows you to define which templates to be used when sending Emails. The options are:

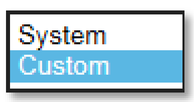
- Send Email to Confirm Volunteer Signup
- Send email To Confirm cancellation of Booking.

Below are the steps to indicate which email template to use:

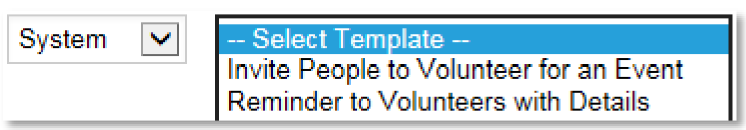
1. Under the **Settings & Customization** section on the left side click on the **Notification Settings** (link).



2. First choose if you want to link to a **System** Email Template or a **Custom** Email Template. *(Applies to both Volunteer Signup and Cancellation of Book)*



3. Then select the appropriate **email template** from the list of templates next to it.



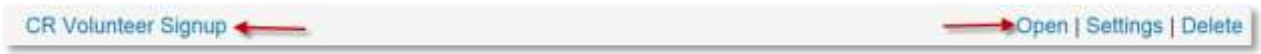
4. Once a template has been selected click on the **Save** (button) to save the changes.

Volunteer Reports

Currently there are two reports to choose from: Summary Report and Volunteer Report.

Below are the steps to execute the Summary Report:

Step 1: Go to the View Signup Lists link and open your volunteer signup sheet.



Step 2: In the Top Left corner you should see a section called Reports. Click on the **Summary Report** link.

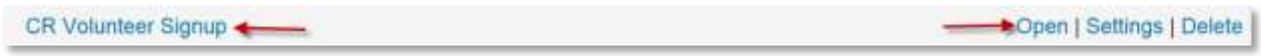
Step 3: You should now see the report specific to this Volunteer Signup. This summary report gives you a quick snapshot of how many tasks have been booked, who has been booked and what is there contact information.


Summary Report of Signup List CR Volunteer Signup II

Name	Date	Start Time	End Time	Volunteer	Email	Phone
Group 1						
Shift 1 2 of 3 booked	Mar 07, 2014	11:00 AM	1:00 PM	ron murrell	ron@doxess.c...	1 (905) 555-5555
	Mar 07, 2014	11:00 AM	1:00 PM	vi tran	vi@doxess.com	0 6666666666
Shift 2 1 of 3 booked	Mar 07, 2014	1:00 PM	3:00 PM	John Doe	johnnyDoe@h...	0 5555555555
Shift 3 0 of 3 booked						

Below are the steps to execute the Volunteer Report:

Step 1: Go to the View Signup Lists link and open your volunteer signup sheet.



Step 2: In the Top Left corner you should see a section called Reports. Click on the **Volunteer Report** link.

Step 3: You should now see the report specific to this Volunteer Signup. This volunteer report gives you a quick list of all of the booked volunteers with their contact information.

Volunteers CR Volunteer Signup II

Volunteer	Email	Phone
ron murrell	ron@doxess.com	1 (905) 555-5555
vi tran	vi@doxess.com	0 6666666666
John Doe	johnnyDoe@hotmail.com	0 5555555555

Training and Support

Visit our **Support Center** at www.ClubRunnerSupport.com to access all resources available, including submitting a support ticket, searching the Knowledge Base, downloading helpful "how-to" documents and viewing on-demand demos.