VolunteerHub User's Guide

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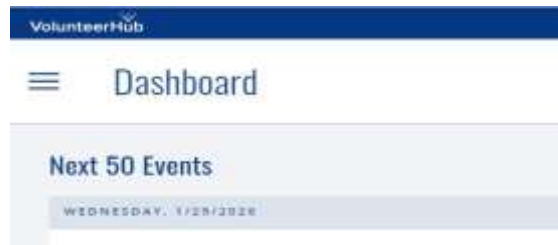# Contents

1 Finding a User in Volunteer Hub

As a driver, you may want to look someone up for a variety of reasons, such as signing a user up for an event, removing a user from an event, or to avoid creating a duplicate account

1. Log in to Volunteer Hub using your DRIVER account
2. Select ADMIN
3. Select the button to the left of Dashboard

   a.

4. Select Users

   a.

5. Begin typing the volunteer's name. This can be first name, last name, partial names
   a. Example: Searching for the volunteer Merton J. Dingle

6. Click Enter on your keyboard
7. Click the volunteer's name to view their account information, edit their account, or see their schedule

   a.

8. If you cannot find the volunteer, try searching alternate spellings of their name

www.phs.volunteerhub.com
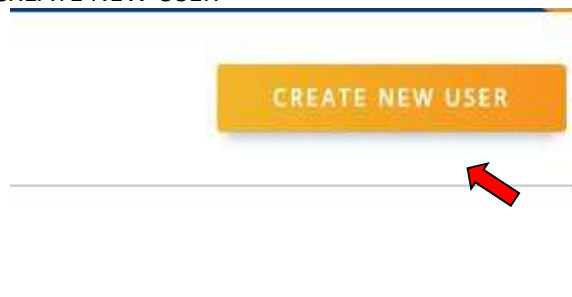
2 Creating a User Account in Volunteer Hub

Always encourage volunteers to create their own accounts. Only create a new user account after double checking they are not already registered.

1. Log in to Volunteer Hub using your DRIVER account
2. Select ADMIN
3. Select the button next to Dashboard
4. Select Users

    a.

5. Select CREATE NEW USER

    a.

6. Fill in all required information
    a. Username
    b. Password
    c. First and Last name
    d. Email
    e. Membership info
    f. Emergency Contact Name
    g. Emergency Contact Number (if unknown, use 1234567890)
    h. Birthday (If unknown, enter 1/1/1900 for anyone over 18 years of age)
    i. Group Membership (Check the box next to the appropriate Flower Show job)
7. Click Save
8. **IMPORTANT** - Make note of the username and password given to this account and share it with the volunteer

3 Adding a User to an Event from the User Account

1. Log in to Volunteer Hub using your DRIVER account
2. Select ADMIN
3. Find user (same as above)
4. Click on the user's name to see a summary of their account
5. Click ADD REGISTRATION
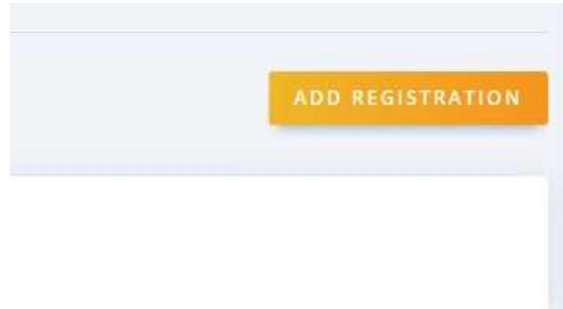
   a.

6. Select the Filter button

   a.
7. Fill in a Start Date for the shift and then start typing the Event Group in the EVENT GROUP search bar

   a.
   b. After you click the Event Group, click SAVE
   c. Click ADD REGISTRATION once more

8. Scroll to the exact shift that you want for that User within that Event Group for that day and click INCLUDE

   a.

9. **IMPORTANT** - Click SAVE

a.

10. To view their future shifts, click Upcoming

a.

4 Adding a User to an Event from the Event Page

1. Log in to Volunteer Hub using your DRIVER account
2. Select ADMIN
3. Select the button next to Dashboard
4. Click Events
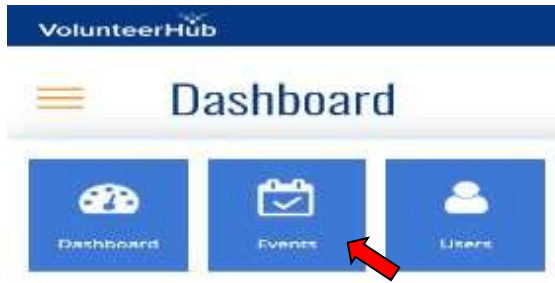
5. Use Filter to help find the event easier.
   a. Select the Filter button

   b. Fill in a Start Date for the shift and then start typing the Event Group in the EVENT GROUP search bar

   c. After you click the Event Group, click the Filter button again to exit. The filter bar should look like this

6. Scroll through the list and look for the correct event name and shift. When you find the correct shift, click that event.
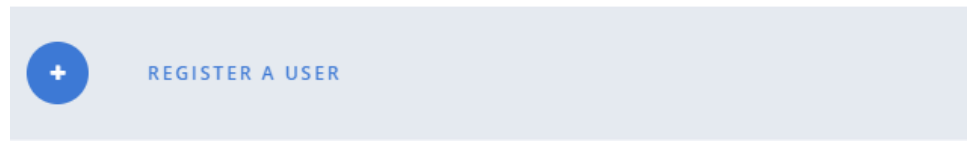
Home Gardening Hub - Shift 4

Flower Show Volunteer Opportunities > Approval not required \`chools > Home Gardening Hub

GROUP RESERVATIONS

None

Mon March 2 3 PM - 6 PM (3 hours)

7. Scroll down until you see Register a User next to a plus sign. Click Register a User

+ REGISTER A USER

8. Click the blank text box under Existing User

EXISTING USER

Enter at least 2 characters.

    a.
9. Begin typing the volunteer name to see a list of registered users
10. Select the correct volunteer from the dropdown list
11. Click Register User after selecting the correct volunteer

EXISTING USER

Merton Dingle (Merton)

☐ Add to Waitlist

✅ Send registration confirmation email

REGISTER USER

5 Removing a User from an Event in Volunteer Hub

1. Log in to Volunteer Hub using your DRIVER account
2. Select ADMIN
3. Find user (same as above)
4. Click on the user's name to see a summary of their account
5. Click Upcoming to see the user's upcoming volunteering shifts
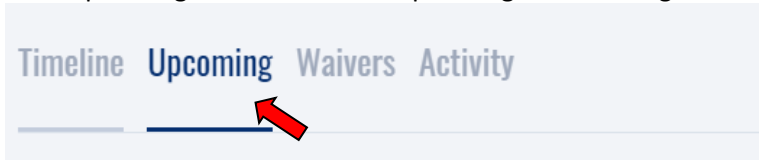
6. Click the orange button next to the shift
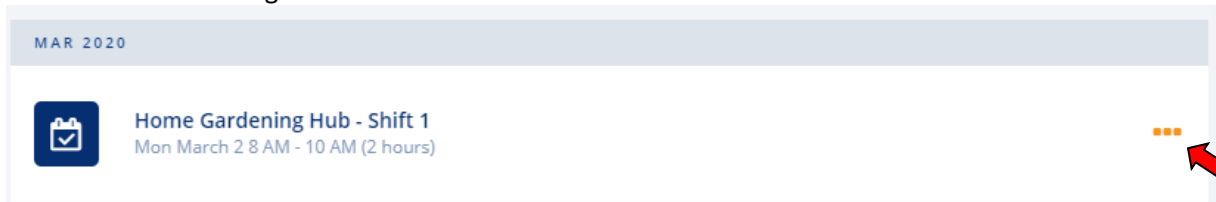
7. In the drop-down menu, click Remove from Event

8. A Cancel Registration window will pop up. Click Cancel Registration to officially remove the user

6 Volunteer Hub Reports

After logging into VolunteerHub
1. Select ADMIN
2. Select the button next to Dashboard
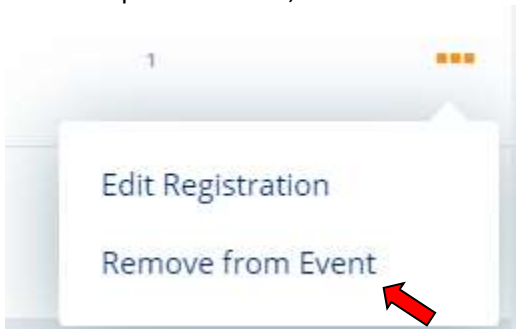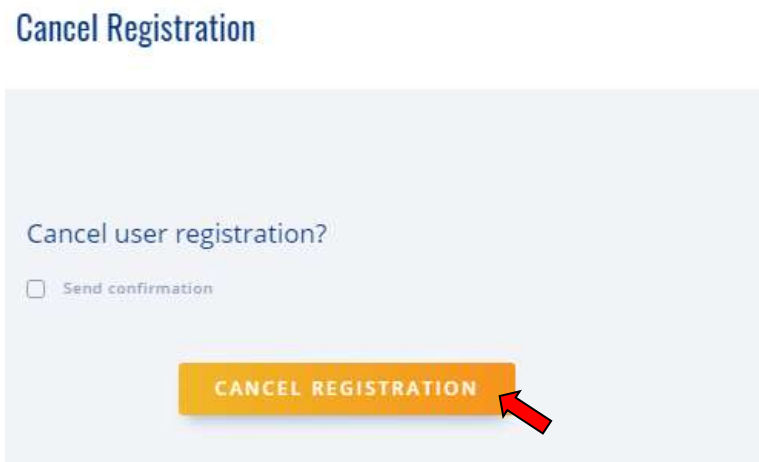3. Select Reports – You can manage volunteers using the following reports:
    a. In Formatted Reports tab
        i. Event Participation by Event
        ii. Event Summary
        iii. Multi-Event Sign-in Sheet
    b. In Unformatted Reports tab
        i. Raw Event Registration Data
        ii. User Roster Report
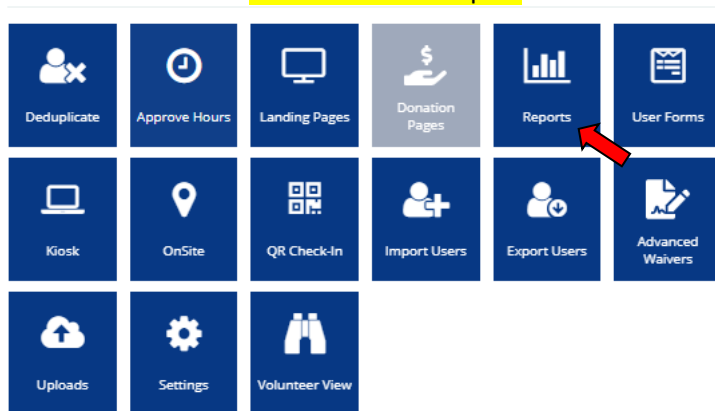
6.1 Event Participation by Event Report
This report shows all volunteers signed up for a specific job.

1. Select Event Participation by Event
2. You can generate a report for 1 day or a range of dates by entering a single day or a date range
3. Click the Event Group box to show the list of volunteer jobs that you can report on. Select a volunteer job.
4. Check the Show Users box
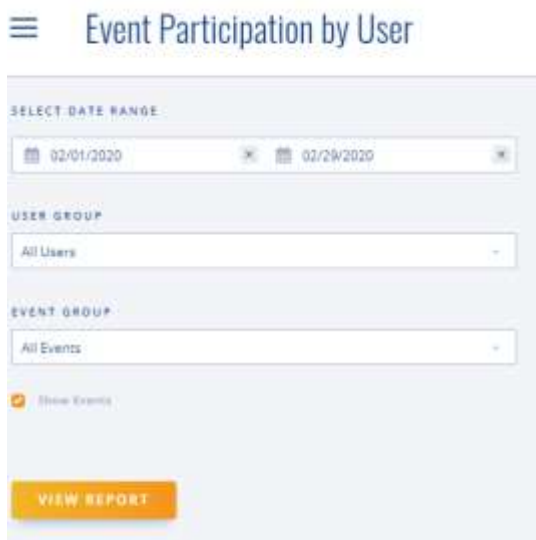
5. Click the View Report button
   a. Results will be listed by date, then shift.

Event Participation by Event — 5/1/2020 - 5/9/2020
All Events

Date	Event	Expected	Hours
5/4/2020 2:00pm	All Events > Plant Time Event (Test)		
Unaffiliated Users			
Alice Aardvark (aardvark)		1	
Jenna Celius (jcelius)		1	
Rachel Cieri (rcieri)		1	
Merton Dingle (Merton)		1	
Betty Greene (bgreene)		1	
		5	0.00
		5/5 (100%)	0.00
(Events with slot limits) Subtotal		5/5 (100%)	0.00
Total		5	0.00

6. To run the report again for a different date, simply change the From and Through dates and click View Report again.
7. This report can be printed or exported

   a. To export, click the 📥 button. In the drop-down menu, choose a format you want to save this report as. You can save it as a Word, Excel, PowerPoint, PDF, TIFF file, MHTML, CSV, and XML file.

   b. To print, click the 🖶 button. A PDF file will be automatically downloaded and ready to print.

6.2 Event Participation by User Report

1. Select Event Participation by User

2. You can generate a report for 1 day or a range of dates by entering a single day or a date range
3. Use the group "All Users" as your User Group
   a. **Important**- Using All Users is the only way to get an accurate report of all your signups.
4. Click the Event Group box to show the list of volunteer jobs that you can report on. Select your volunteer job.
5. Click Show Events
6. Click the View Report button
7. Export or print (same as above)
8. To run the report again for a different date, simply change the From and Through dates and click View Report again.

6.3 Event Summary Report

1. Select Event Summary

2. You can generate a report for 1 day or a range of dates by entering a single day or a date range
3. Click In the Event Group box to show the list of volunteer jobs that you can report on. Select a volunteer job.
4. Check the Show User Info box
5. Click the View Report button
6. Results will be listed by date, then shift.

Event Summary
Monday, May 4, 2020

All Events
Plant Time Event (Test)

Monday, May 4 2:00pm - 5:00pm   Contact: Rachel Cieri (rcieri)

Unaffiliated Users

Merton Dingle (Merton)   100 N. 20th St.   1
                                              Philadelphia, PA 19103
                                              C: 111-111-1111
                                              jcelius@pennhort.org

                                              Unaffiliated Users Total   1
                                              Plant Time Event (Test) Total   1

    a. To run the report again for a different date, simply change the From and Through dates and click View Report again.

6.4 Multi-Event Sign-In Sheet Report

1. Select Multi-Event Sign-In Sheet

2.
    a. Change date range. You can generate a report for 1 day or a range of dates by entering a single day or a date range
    b. Click the Event Group box to show the list of volunteer jobs for which you can create a report. Select a volunteer job.
    c. Click the View Report button

Pennsylvania Horticultural Society

Multi-event Sign-In Sheet

5/1/2020 - 5/9/2020

Name	Signature	Time In	Time Out
Alice Aardvark (aardvark)			
5/4/2020 2:00PM - 5:00PM Plant Time Event (Test)			
Jenna Celius (jcelius)			
5/4/2020 2:00PM - 5:00PM Plant Time Event (Test)			
Rachel Cieri (rcieri)			
5/4/2020 2:00PM - 5:00PM Plant Time Event (Test)			
Merton Dingle (Merton)			
5/4/2020 2:00PM - 5:00PM Plant Time Event (Test)			
Betty Greene (bgreene)			
5/4/2020 2:00PM - 5:00PM Plant Time Event (Test)			

    d. To export the report to a spreadsheet

        i. Click ![button] button
        ii. In the drop-down menu, choose Excel
        iii. The spreadsheet will be downloaded.

    e. To run the report again for a different date, simply change the From and Through dates and click View Report again.

6.5   Raw Event Registration Data Report

This report will generate a spreadsheet with volunteer contact and job information.

1. In the Unformatted Reports tab, select Raw Event Registration Data

2.

    a. Change the date range. You can generate a report for 1 day or a range of dates by entering a single day or a date range

b. Click the Event Group box to show the list of volunteer jobs that you can report on. Select the volunteer job for which you want a report.
c. Always use "All Users" as your User Group.
   i. **Important**- Using All Users is the only way to get an accurate report of all your signups.
d. Click the Preview Report button
   i. Results will be listed by date, then shift, then volunteer.

e. To open the report in a spreadsheet:
   i. Select Download Full Report
   ii. Click open on the downloaded report
   iii. Event Start Time and Event End Time is shown as military time. To change to standard time:

   1. Highlight columns A and B.
   2. Right click on the columns
   3. Select Format Cells
   4. Select Date
   5. In the Type: box select the date and time as shown below:
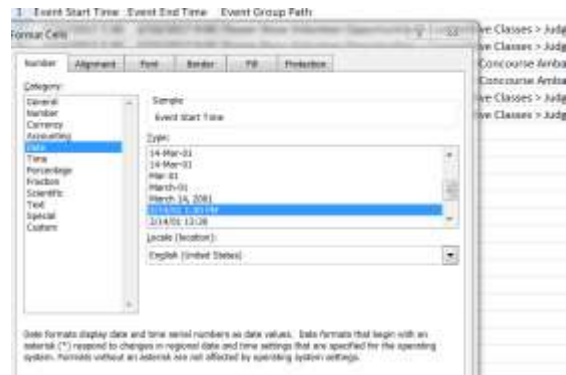
a.

    f.   To run the report again for a different date, simply change the From and Through dates and click View Report again.

    g.   To exit this report, click exit.

6.6   User Roster Report

1.   In the Unformatted Reports tab, choose User Roster

7 Sign-In Sheets

There are two ways to create sign-in sheets. The first way is to run a Multi-Event Sign-In Sheet as outlined in step 6.4. The second way is to create the sign in sheet from the Event itself.

1. Log in to Volunteer Hub using your DRIVER account
2. Select ADMIN
3. Click the button next to Dashboard
4. Select Event
5. Filter the Event Group (same as above)
6. Choose the correct Event
7. At the top of the page, click the orange button next to Edit

8. In the drop-down menu, click either Open Sign-In Sheet for PDF file or Export Sign-In Sheet for Excel file.
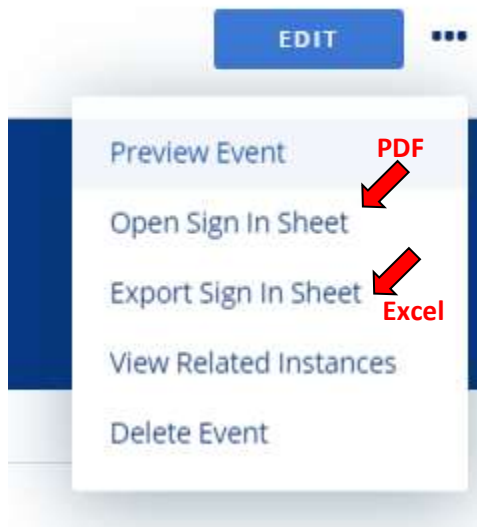
8 Adding User Group Permissions to Volunteer Accounts

As a driver, you may sometimes need to add users to events. In order for these volunteers to show up in all reports make sure that user has the proper User Group permissions.

Volunteers get User Group permissions by either
1. Logging in through the appropriate Landing Page -or-
2. An Admin or Driver assigning the proper permission

Please note - this is especially important for the User Roster report. A volunteer will only appear in the User Roster report if they have permission for that user group. As a driver, signing a volunteer up for a shift does not add that volunteer to the User Group. Follow the steps below to add a user to a specific group.

Assigning User Group Permissions to a Volunteer
1. Log in to Volunteer Hub using your DRIVER account
2. Search for the user
3. Click the appropriate user name
4. Click Edit
5. In User Group Memberships on the right side of the screen, enter the desired user group in Select User Group box and check the appropriate User Group

6. The chosen user group will appear above. **Important** - Click Save on top of the page to save the change

New group chosen

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9 Checking in Users after an Event ends

1. Log in to Volunteer Hub using your DRIVER account
2. Select ADMIN
3. Select Event
4. Filter the date and Event Group (same as above)
5. Choose the correct Event
6. Select Record Hours

7. Enter the number of hours worked next to each volunteer name
8. Click Save
9. **Please note**- To receive an automatic Thank You email, hours must be added within 24 hours of the Event