

VolunteerHub User's Guide



PHS

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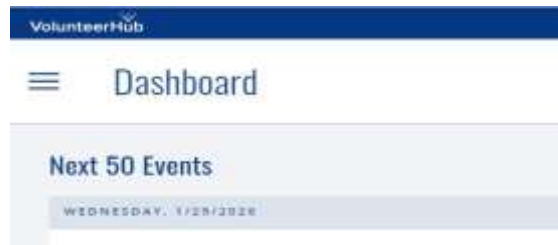
Contents

1 Finding a User in Volunteer Hub	3
2 Creating a User Account in Volunteer Hub	4
3 Adding a User to an Event from the User Account.....	5
4 Adding a User to an Event from the Event Page	7
5 Removing a User from an Event in Volunteer Hub	9
6 Volunteer Hub Reports	10
6.1 Event Participation by Event Report	10
6.2 Event Participation by User Report	112
6.3 Event Summary Report	122
6.4 Multi-Event Sign-In Sheet Report.....	133
6.5 Raw Event Registration Data Report	144
6.6 User Roster Report.....	166
7 Sign-In Sheets.....	177
8 Adding User Group Permissions to Volunteer Accounts	188
9 Checking in Users after an Event ends	199

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

2 Creating a User Account in Volunteer Hub

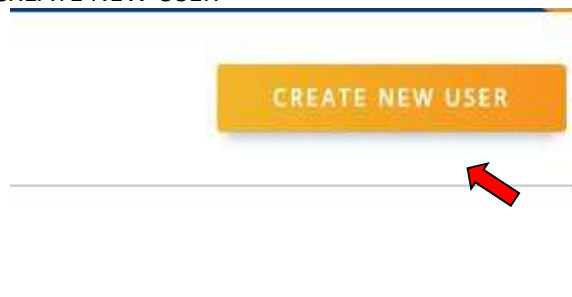
Always encourage volunteers to create their own accounts. Only create a new user account after double checking they are not already registered.

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

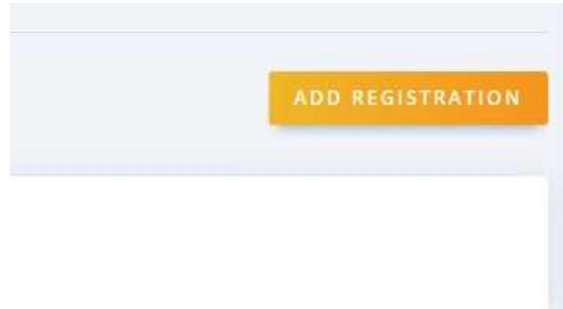


a.

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 screenshot of a registration form with four input fields arranged in a 2x2 grid. The top-left field is labeled 'DATE (REQUIRED)' and contains a calendar icon, the date '03/02/2020', and a placeholder '00/00/0000'. The top-right field is labeled 'EVENT GROUP' and contains a dropdown menu with 'Home Gardening Hub' selected. The bottom-left field is labeled 'EVENT CONTACT' and contains the placeholder text 'Enter Event Contact'. The bottom-right field is labeled 'RECURRENT MASTER' and contains a dropdown menu with 'Select Recurrence Master' selected.

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

The screenshot shows the 'Add Registration' form. At the top right are 'CANCEL' and 'SAVE' buttons. Below the title is a search bar with a magnifying glass icon and an 'INCLUDE ALL' button. The 'Where' field contains filters for 'FROM 05/2/2020' and 'EVENT GROUP: HOME GARDENING HUB'. The date 'MONDAY, 3/2/2020' is displayed. The main entry is 'Home Gardening Hub - Shift 1' with a description: 'Power Show Volunteer Opportunities - Approval not required - activity - Home Gardening Hub'. To the right, there is a progress bar showing '0' filled and '1' reserved, with a 'RESERVED LIMIT' of 1. A 'DONE' button is at the bottom right.

a.

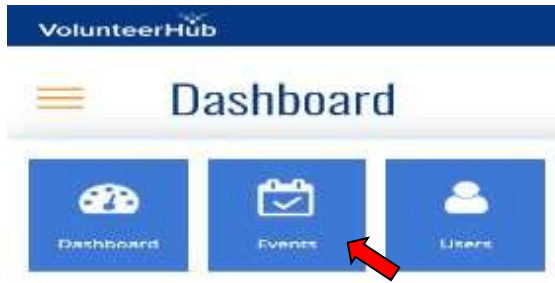
10. To view their future shifts, click Upcoming

The screenshot shows a user profile for 'Merton Dingle (Merton)'. The profile includes a menu icon, the name 'Merton Dingle (Merton)', and a blue header with 'MD' initials, 'STATUS Active', and 'TOTAL HOURS 26.98'. Below the header are tabs for 'Timeline', 'Upcoming', 'Waivers', and 'Activity'. The 'Upcoming' tab is selected, showing a calendar icon and the event 'Home Gardening Hub - Shift 1' for 'Mon March 2 8 AM - 10 AM (2 hours)'. The month 'MAR 2020' is indicated above the event.

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

Add Registration



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

DATE (REQUIRED)	EVENT GROUP
<input type="text" value="03/02/2020"/> <input type="text" value="00/00/0000"/>	<input type="text" value="Home Gardening Hub"/>
EVENT CONTACT	RECURRENCE MASTER
<input type="text" value="Enter Event Contact"/>	<input type="text" value="Select Recurrence Master"/>

- 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

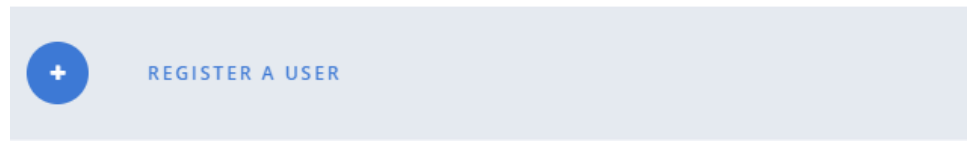
Flower Show Volunteer Opportunities > Approval not required schools > Home Gardening Hub

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



8. Click the blank text box under Existing User

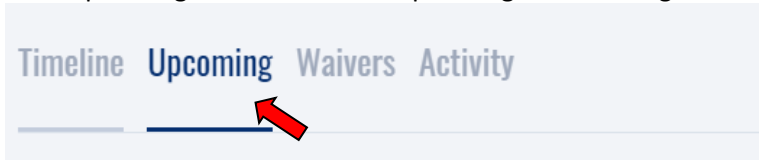
A form section titled 'EXISTING USER' containing a white text input box. A red arrow points to the input box. Below the input box is a white error message box with the text 'Enter at least 2 characters.' in blue.

- 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

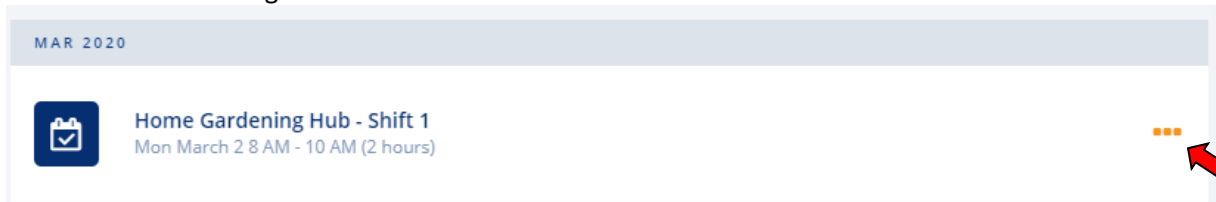
A form section titled 'EXISTING USER' containing a white dropdown menu with the text 'Merton Dingle (Merton)'. Below the dropdown are two checkboxes: 'Add to Waitlist' (unchecked) and 'Send registration confirmation email' (checked). At the bottom is an orange button with the text 'REGISTER USER' in white capital letters. A red arrow points to the button.

5 Removing a User from an Event in Volunteer Hub

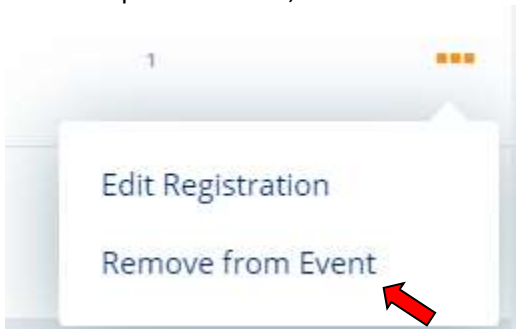
1. Log in to Volunteer Hub using your DRIVER account
2. Select ADMIN
3. Find user (same as above)
4. Click on the user's name to see a summary of their account
5. Click Upcoming to see the user's upcoming volunteering shifts



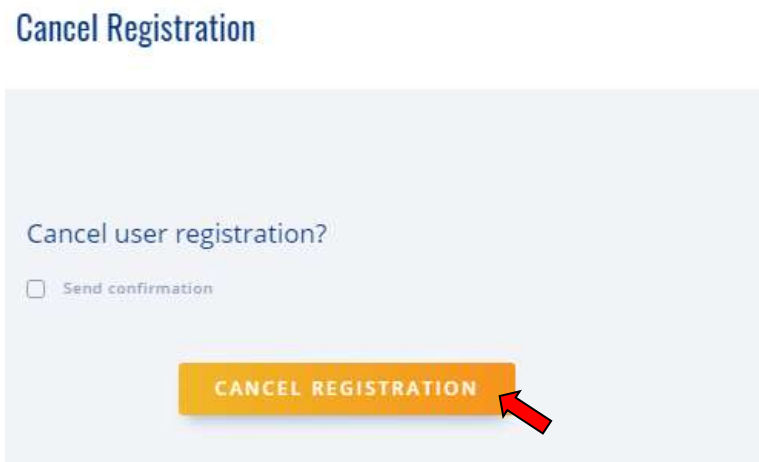
6. Click the orange button next to the shift



7. In the drop-down menu, click Remove from Event



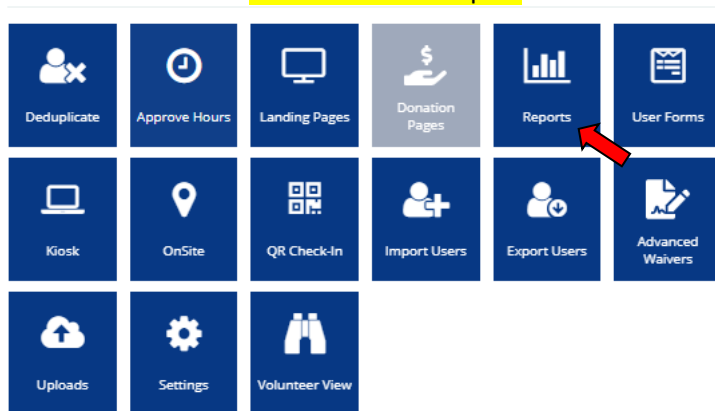
8. A Cancel Registration window will pop up. Click Cancel Registration to officially remove the user



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 ²

A screenshot of a web form titled 'SELECT DATE RANGE' and 'EVENT GROUP'. The 'SELECT DATE RANGE' section has a date range input field with '05/01/2020' and '05/09/2020' entered. The 'EVENT GROUP' section has a dropdown menu with 'All Events' selected. Below the dropdown is a checkbox labeled 'Show Users' which is checked. At the bottom is an orange button labeled 'VIEW REPORT'. Red arrows and numbers point to: '2' pointing to the date range input field, '3' pointing to the 'Show Users' checkbox, and '4' pointing to the 'VIEW REPORT' button.

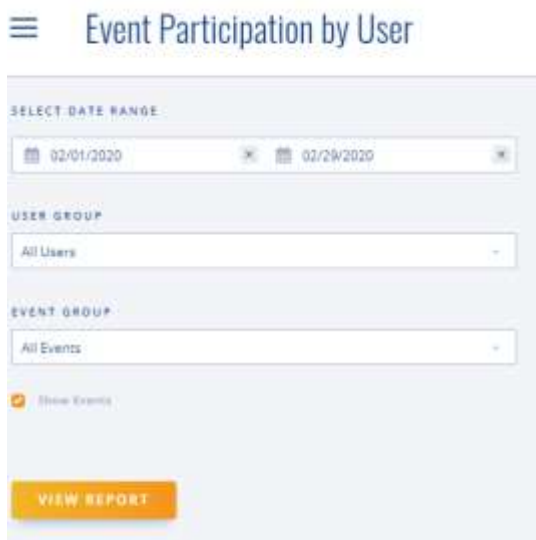
5. Click the View Report button
 - a. Results will be listed by date, then shift.

Event Participation by Event		5/1/2020 - 5/9/2020	
Date	Event	Expected	Hours
All Events			
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



Event Participation by User

SELECT DATE RANGE

02/01/2020 02/29/2020

USER GROUP

All Users

EVENT GROUP

All Events

Show Events

VIEW REPORT

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



The screenshot shows the 'Event Summary (v2)' interface. At the top left is a hamburger menu icon. The title 'Event Summary (v2)' is displayed in a large, dark blue font. Below the title is a light blue panel containing the following elements:

- SELECT DATE RANGE:** A date range selector with two calendar icons. The first date is '05/01/2020' and the second is '05/09/2020'. Each date has a small 'x' icon to its right for clearing the selection.
- EVENT GROUP:** A dropdown menu with 'All Events' selected and a downward arrow on the right.
- Show User Info:** A checkbox that is checked, with the text 'Show User Info' to its right.
- VIEW REPORT:** A prominent orange button with white text.

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.

1 of 1 Find | Next

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. Philadelphia, PA 19103 C: 111-111-1111 jcelius@pennhort.org	1
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

Multi-Event Sign-In Sheet

SELECT DATE RANGE

📅 05/01/2020
×
📅 05/09/2020
×

EVENT GROUP

All Events
▼

VIEW REPORT

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


1 of 2 ? Find | Next

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
 - 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

 Raw Event Registration Data

SELECT DATE RANGE

 02/01/2020  02/29/2020

EVENT GROUP

All Events

USER GROUP

All Users

PREVIEW REPORT

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

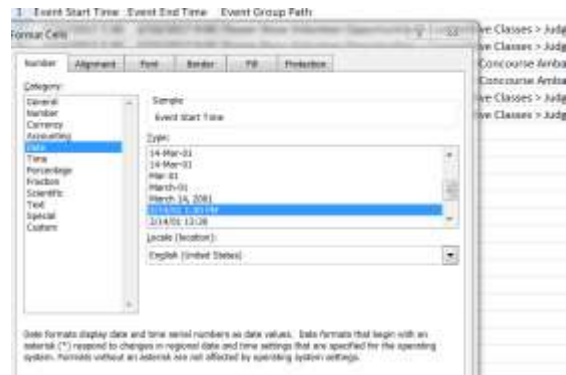
- b. Click the Event Group box to show the list of volunteer jobs that you can report on. Select the volunteer job for which you want a report.
- c. Always use “All Users” as your User Group.
 - i. **Important**- Using All Users is the only way to get an accurate report of all your signups.
- d. Click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

EVENT START TIME	EVENT END TIME	ASSIGNED DATE	EVENT GROUP PATH	EVENT NAME	EVENT LOCATION
2/5/2020 10:00:00 AM	2/5/2020 1:00:00 PM	11/1/2019 11:20:50 AM	Flower Show Volunteer Opportunities > Competitive Classes > Judging > Points and Computer Support > Points Assistance-Pre-Show	Points Assistance-Pre-Show	100 N. 20th St, Philadelphia PA 19103
2/5/2020 10:00:00 AM	2/5/2020 1:00:00 PM	1/24/2020 9:30:00 AM	Flower Show Volunteer Opportunities > Competitive Classes > Judging > Points and Computer Support > Points Assistance-Pre-Show	Points Assistance-Pre-Show	100 N. 20th St, Philadelphia PA 19103

- 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:

	A	B	C	D
1	Event Start Time	Event End Time	Event Group Path	Event Name
2	3/10/2017 7:30	3/10/2017 9:00	Flower Show Volunteer Opportunities > Competitive Classes > Judging > Design Nomenclature & Passing	Design
3	3/10/2017 7:30	3/10/2017 9:00	Flower Show Volunteer Opportunities > Competitive Classes > Judging > Design Nomenclature & Passing	Design
4	3/11/2017 18:30	3/11/2017 21:00	Flower Show Volunteer Opportunities > Inforum > Concourse Ambassador	Concourse
5	3/12/2017 8:00	3/12/2017 12:00	Flower Show Volunteer Opportunities > Inforum > Concourse Ambassador	Concourse
6	3/15/2017 7:30	3/15/2017 9:00	Flower Show Volunteer Opportunities > Competitive Classes > Judging > Design Nomenclature & Passing	Design
7	3/15/2017 7:30	3/15/2017 9:00	Flower Show Volunteer Opportunities > Competitive Classes > Judging > Design Nomenclature & Passing	Design
8				
9				

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

☰ User Roster

User Group Membership

MEMBERSHIP

Show users who are members of the

All Users

group.

Activity

Show only users created between

01/12/2020 02/12/2020

Show only users who registered for events between

01/12/2020 02/12/2020

in the

All Events

event group.

Affiliation

Show all affiliations.

Show only users who registered for an event with

Hon Staging Chair

Show only users who registered for an event without an affiliation.

PREVIEW REPORT DOWNLOAD FULL REPORT

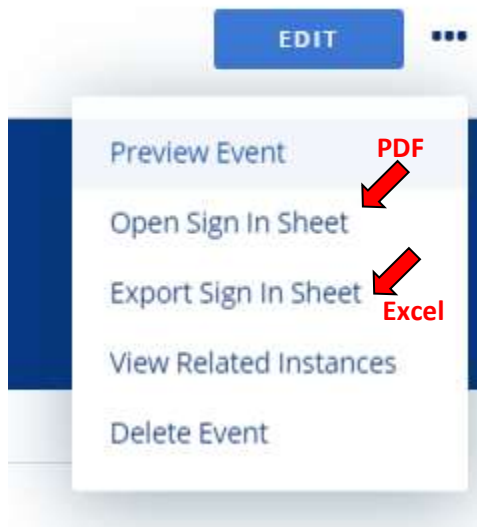
7 Sign-In Sheets

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

User Group Memberships

- I'm a NEW Flower Show volunteer!
- Approval Not Required
- PHS Volunteer Opportunities
- Unapproved Volunteers

SELECT USER GROUP

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

CANCEL SAVE

all.com

User Group Memberships

- I'm a NEW Flower Show volunteer!
- Approval Not Required
- PHS Volunteer Opportunities
- Unapproved Volunteers
- *A **New group chosen**

SELECT USER GROUP

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