

Organisation Registration process

On your Volunteer Centre website click on the organisation page (e.g. We Want Volunteers) and then click on your *Login/Register* button to take you to the **Organisation Login** screen, as below.



Organisation Login

Username

This is the email address you used when signing up

Password

Login or register as a new user

Already registered

If you have previously registered with Volunteer Connect:

- enter your **Username** (email address) and **Password**
- click **Log In**

Now go to **Page 8**.

New Organisation Registration

- Click the **Register** button
- Enter your name, email address and create your own password
- Click **Save**

Sign Up

First Name

Surname

Email Address for Login

Confirm Email Address

Password

Confirm Password

Complete the organisation profile

On the next page, in the **Organisation** field start to type in the name of your organisation – this will auto complete with your organisation details, if your organisation is already in the VC Connect database.

If your organisation is not already in the database, then please enter the organisation name and complete all the fields on the profile page, e.g. address, service, client group, areas.

Organisation Profile

You have been registered.

Organisation

Select your organisation - this will automatically complete most of the information below.
Type your organisation name in the box below to bring up a list of matching organisations.
If you are not already on the list, completing this form will add it to our database.

Organisation

Building

House Number

Street

Town

County

Postcode

Phone

Voluntary Action
Third Sector Essentials - GIO Project
Voluntary Action Barnsley
Voluntary Action Calderdale
Voluntary Action Charnwood
Voluntary Action Epping Forest
Voluntary Action Kirklees
Voluntary Action Leeds

The profile form asks for/includes information on:

- **Contact details** of your organisation. This is the main contact point for your organisation – often the reception or admin contact, ***not*** the main contact for volunteering.
NOTE - you are able to enter the contact details of the role when you add/edit roles
- **Aims and activities** of the organisation
- **Client groups** you work with
- Areas of **interests** that your organisation fits into. This will directly influence the search results when volunteers search for and enter their 'areas of interest'

Once this information is completed, click **Save**.

You are able to **COPY** a role also.

New organisation registrations will receive an email notification that their registration is pending and will be reviewed by the Volunteer Centre.

Once reviewed by the Volunteer Centre the organisation will receive an email confirming their registration has been approved.

An organisation is now able to:

- Add and edit their volunteer roles
- Invite volunteers to apply for their roles
- Communicate with volunteers who have registered interest in the role
- Edit their organisation profile

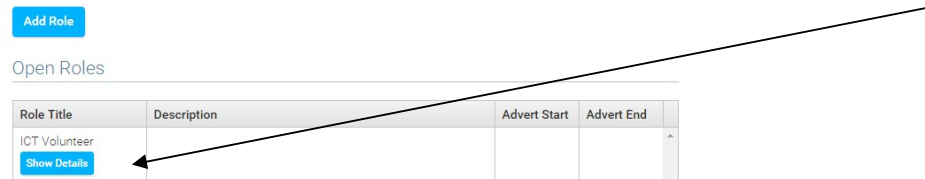
Editing existing roles

Click on **Manage Roles** on the menu bar.

To edit an existing role please click on the **Show Details** button under the role title



Managing your roles



Here you can edit all the role details, contact details for the role and control the dates that the role will be advertised online. Please check:

1. The advertising dates are correct

Note – you will receive an automated email when your role is soon to expire

2. The 'closed' button - ticking the closed button will remove the role off the website, leaving it open / un-ticked means the role will be advertised online.
3. Phone vs public phone:
'phone' is only visible to VC / VAS staff
4. Contact e-mail: Receive notification of all applications
5. There are other fields which you can complete for each role these are:
 - Number of volunteers required
 - How to find out more e.g. details of a recruitment drop in session
 - Skills required
 - Benefits from this role
6. Click **Save**

Adding roles

Click on **Manage Roles** on the menu bar.

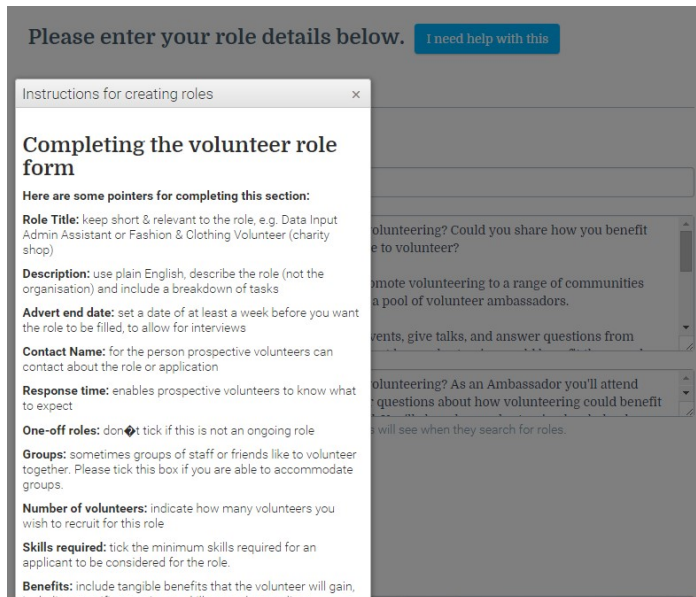
To add a role please click **Add Role**



Managing your roles



When completing the form, if you need any help or guidance, click on the **I need help with this** button. This provides additional guidance on completing the role profile e.g. using clear role titles, being concise etc.



Role available in multiple locations

Please tick the box if the role is available in multiple locations, postcode areas. Once ticked then the role will appear in all role searches. You can enter additional information on the location (e.g. wards, postcodes, boroughs) in the **Role Address** field.

Available in multiple locations

If this role is available in multiple locations you must select the tick box above, and you can enter further location details in the Role Address box below.

Role Address

Please enter the role address, or further location details, if it is different from your organisation address.

You can edit any of your roles at any time - click on **Show Details** next to the role.

Once you have edited the details of the role click **Save**, at the bottom of the page.

Managing your Volunteers

Click **Manage Volunteers** on the main menu bar.

Edit Profile Manage Roles Manage Volunteers Volunteer Bank Signed in as Judith Lennox
Admin (Voluntary Action Sheffield) Change User Log Out Change Password

Manage Volunteers Dashboard

Help

Volunteers In Progress

The Status option 'Contacted' used to be named Invited Awaiting Reply
The headings can be filtered by clicking on the filter symbol, To clear a filter (search) click the CLEAR button
To update a record click EDIT and Click UPDATE to save the record.

	Name	Role	Post code	Status	Profile	Notes	Last Edited	Started Volun...	End Date	Volun... Hours
▶ <input type="button" value="Edit"/>	Jill Malcol...	Garden...	S1	Stopped	I am interested in gardening	Email Jill again	10/12/...	05/12/...	07/12/...	
▶ <input type="button" value="Edit"/>	Peter Test	Garden...	S1	Regist... Interest	Something about me		01/11/...			

When viewing a role you can view what stage you are at, in terms of contact with the volunteers.

Volunteers in Progress dashboard

Please do take a moment to watch this short video that explains how the organisation dashboard for our Volunteering Platform works

<http://www.simplyconnectsolutions.co.uk/volunteer-organisation-dashboard/>

Please note click the **UPDATE** button to save all edits and updates on the dashboards.

These three dashboards provide you with the option to invite volunteers to apply for your role, include notes against the volunteer, flag when they start volunteering etc.

There are three dashboards available onscreen:

1. Volunteers in Progress

Flags the progress and status of your volunteers, e.g. volunteers contacted, application in progress, volunteers started

2. Possible Matching Volunteers

You can read the volunteers profile or invite them to apply.

3. Volunteers who have started a role

Volunteers move to this box once they Start a placement. Once the person finishes volunteering and the Status field is changed to Stopped the volunteer moves back to the Volunteer in Progress dashboard.

To Filter and Search

- Click the filter icon (in the column headings)
- Select an option from the drop down list:
 - **contains**
 - **is equal to**
 - **starts with**
- Enter your search text in the white box e.g. Smith, to search for all contacts with this surname
- Click Filter

Click the filter symbol and click **Clear** to un-filter the data.

Navigation

Please use the scroll bars to navigate the tables. Drag the scroll bars to navigate the table.

Edit

Click the EDIT button to edit and update a volunteer's profile.

Update

Click the UPDATE button (left hand side) to save updates to the volunteer's record.

Name

Click the volunteer's name to view the volunteer's profile (skills, interests, profile and availability).

Volunteer Unsuitable

If the volunteer is deemed unsuitable for the role, you can remove the volunteer and an automated email will be sent to the volunteer.

Volunteers in Progress dashboard

Status options

The options available in the status field:

- **Application in Progress** - e.g. The volunteer has accepted an invite to apply for a role, awaiting the return of an application form, due to interview volunteer
- **Application not processed** – e.g. Volunteer not suitable for role, volunteer no longer interested
- **Contacted** (previously named **Invited Awaiting Reply**) – When the organisation invites the volunteer to apply for the role, from either the possible matched volunteers or registered interest in a role
- **Declined interest** – Volunteer will flag this if they decline the invite to apply for the role
- **Registered interest** – Volunteer registers interest in your role
- **Started** – The date the volunteer started volunteering
- **Stopped** – The date the volunteer stopped volunteering

Column headings

Notes – Can add and update notes about the volunteer

Start Date – Date they started volunteering

End Date – Date they stopped volunteering

Volunteer Hours – Average number of hours the person volunteers

Edit – Click to edit the fields, i.e. status, notes, volunteer hours

Update – Click save to save all edits

Invite a volunteer to apply

You are able to invite volunteers to apply for your roles.

On the role profile form, click on the name of the volunteer and review their profile.

Complete the **Message to Volunteer** box and then click the green **Invite to Apply** button.

Message To Volunteer

Invite to Apply Close

Volunteer is unsuitable (will send auto email) **Remove Volunteer** An automated email will be sent to the volunteer on clicking this button. Your contact details will be included in the email.

You can also view if the volunteer has applied for other roles at the same organisation.

Other roles applied for

- Admin Helper

After reviewing a volunteer's profile you may feel they are not suitable to the role - you can remove them for the list by selecting **Volunteer is unsuitable (will send auto email) – Remove Volunteer**.





An automated email will be sent to the volunteer, gently explaining they have been found unsuitable for the role and they can contact the organisation direct or the local volunteer centre for further advise or support.

To view the volunteer's historic status notes

Click the small arrow, at the left hand side of the volunteer's name to view the historic notes.

Volunteers In Progress

Any of the headings can be filtered by clicking on the filter symbol. To clear a filter (search) click CLEAR, in the filter symbol.
To update a record click EDIT.

	Name	Role	Post code	Status	Profile	Notes	Last Edited	Started Volunteering	End Date	Volunteer Hours
 	Sarah Grindrod	Gardener	S1	Stopped			12/10/2018	17/09/2018	30/09/2018	4
		Role		Notes			Last Edited			
		Gardener					01/10/2018			
		Gardener					01/10/2018			

1 - 2 of 2 items

Possible Matching Volunteers dashboard

Click on the volunteer's name to access their volunteer profile.

You can send a message to the volunteer or you can remove the volunteer from the dashboard if you feel they are unsuitable.

If you invite the volunteer to apply for the role, please enter a message in the 'message to volunteer' box and click invite to apply. Then click Close once you have received confirmation the message has been successfully sent.

If you invite the volunteer to apply for your role, the volunteer's name will move to the Volunteers in Progress dashboard. The Status field will state Application in Progress.

The dashboard includes a date registered and date last registered interest in a role.


Volunteers Profile

A volunteer's profile will include:

- Skills they have
- Activities they want to be involved with
- Their availability

See the example below of a volunteer profile:

Volunteer Profile

Contact Information	
First name	Judith 
Surname	Test

Skills and Interests	
Skills	Admin, Evaluating & Reviewing
Interests	Disability
Activities	
Where I want to volunteer	
Communication Methods	
Brief profile	I am great....

Availability			
	Morning	Afternoon	Evening
Monday	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Tuesday	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Wednesday	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Thursday	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Friday	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Saturday	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Sunday	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>