Raptor University
Volunteer Admin Training

Instructor:

Learning Objectives

This presentation includes the detailed instruction of the following tasks to get you started using Raptor:

- Navigating Volunteer Workspace
- View/Edit Volunteer Details
- Create Volunteer Portal Account
- Email Volunteers
- Activate/Deactivate Volunteer Accounts
- Manage Volunteer Hours
- Create/Import Volunteers
- Delayed Sign In/Out
- Batch Printing
- Volunteer Reports
- Volunteer Events

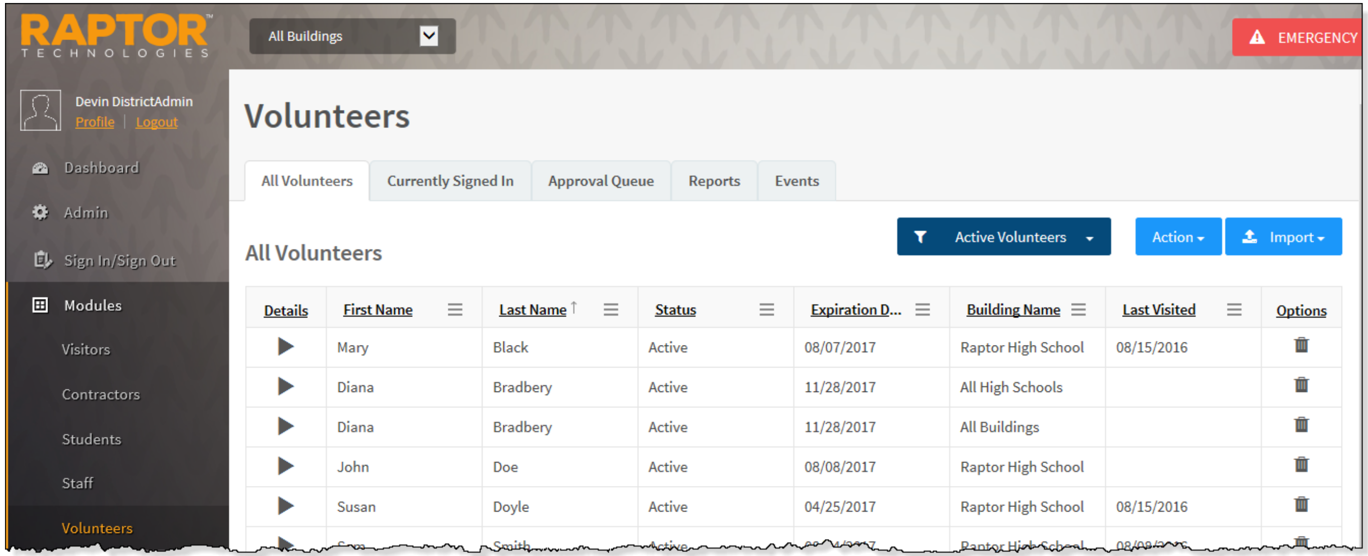
Agenda

The Volunteer Module is used to manage the volunteers who enter your building and the volunteer application process. The workspace is organized as follows:

- Volunteers Workspace
- All Volunteers
- Currently Signed In Volunteers
- Delayed Sign In and Sign Out
- Batch Printing
- Approval Queue
- Volunteer Reports
- Volunteer Events

Volunteer Workspace

You can manage volunteers using the **Volunteers** workspace. Select **Modules > Volunteers** in the navigation menu and then click the tab in the Volunteers workspace for the tasks you want to perform.



Administrators with the *Can Manage Volunteers* permission can use the **All Volunteers** tab to:

- Filter to view Active, Inactive or All volunteers
- View, edit and delete volunteers
- Create an application for a volunteer
- Email all volunteers
- Deactivate and activate all volunteers
- Reset volunteer hours
- Import approved volunteers and applications (*Can Import Volunteers* permission)

View and Modify Volunteer Details

Filter Volunteers

You can filter which volunteers display on the **All Volunteers** workspace.

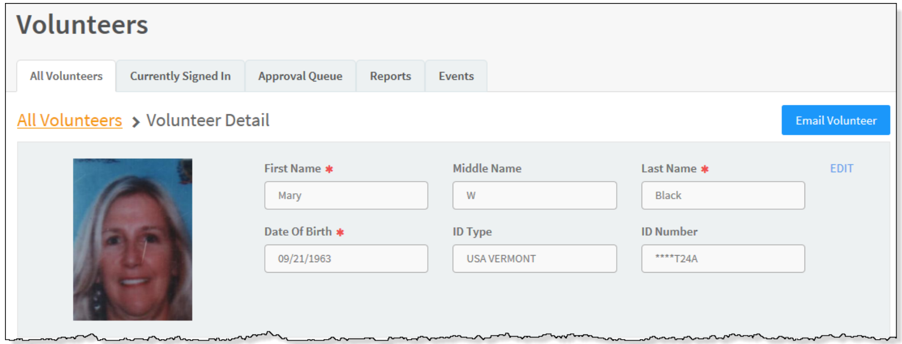
1. From the navigation menu, select **Modules > Volunteers**.
2. In the **Filter** drop-down list on the **All Volunteers** workspace, select **Active Volunteers**, **Inactive Volunteers** or **All Volunteers** to specify which volunteers display in the workspace.

View or Modify Volunteer Details

Perform the following steps to view or modify the details about a specific volunteer.

1. From the navigation menu, select **Modules > Volunteers**.
2. On the **All Volunteers** workspace, click the ▶ icon next to the volunteer's name to expand the **Volunteer Detail** workspace.

   Note: The icon in the **Options** column indicates the record can only be modified at the client level (All Buildings).



3. If you want to modify the volunteer record, click **Edit** (asterisk * indicates a required field).
4. Click **Save** to update the record.

Delete Volunteer

On the **All Volunteers** workspace, click the icon in the **Options** column and then click **OK** to confirm the deletion.

RAPTOR TECHNOLOGIES

View Application History/Hours Logged

Application History

At the client level (All Buildings), the **Application History** area on the **Volunteer Detail** workspace displays a log of all applications submitted by the volunteer. By default, the submission date, application status, approval date, and who approved the application displays.

Application History

Details	Submit Date	Application Status	Approval Date	Approved By
▶	08/07/2016	Approved	08/07/2016	Devin DistrictAdmin

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To view the details for a specific application, click the ▶ icon in the **Details** column.

Hours Logged

The **Hours Logged** area on the **Volunteer Detail** workspace displays each function the volunteer has signed in for, the sign-in date and time, the sign-out date and time, and the total hours volunteered.

Administrators with the *Can Manage Volunteers* permission can edit the function, sign-in or sign-out date/time or delete an entry. Any of these actions will not alter the Sign In/Sign Out History.

Click **Reset Hours** to clear the tracked hours and reset the count to zero.

Notes:

- You can also reset volunteer hours at the building or district level.
- Resetting a volunteer's hours at any level will reset the hours across all buildings for that volunteer.

Hours Logged

Function	Sign-In	Sign-Out	Total Hours	Options
School Event	08/08/16 2:45 PM	08/08/16 3:15 PM	00:30	
School Event	08/08/16 6:00 PM	08/08/16 6:00 PM	00:00	
School Event	08/15/16 1:54 PM	08/15/16 6:00 PM	04:05	

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Reset Hours (Last Reset Date : 08/07/2016)

View Sign-In/Sign-Out History

The **Sign-In/Out History** area on the **Volunteer Detail** workspace displays a log of sign in and sign out events for the selected volunteer.

By default, the Date/Time, Event Type, Building Name and Destination columns display. From the column menu, you can also choose to display the Event Method column.

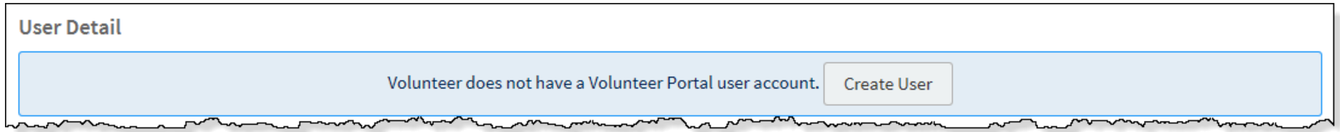
Sign-In/Out History

Date Time ↓	Event Type	Event Method	Building Name	Function
05/09/16 4:32 PM	Sign In	Operator Assisted	Raptor High School	School Event
04/27/16 12:12 PM	Sign Out	Operator Assisted	Raptor High School	School Event
04/27/16 11:06 AM	Sign In	Operator Assisted	Raptor High School	School Event

Create Volunteer Portal User Account

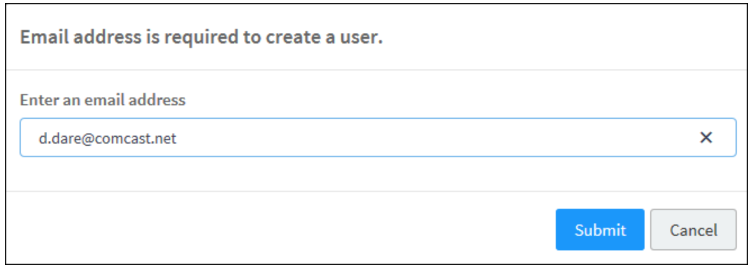
If the Volunteer Portal is enabled and the volunteer does not have a volunteer portal user account set up, the **User Detail** area on the **Volunteer Detail** workspace displays a message bar.

1. In the **User Detail** area on the **Volunteer Detail** workspace, click **Create User**.



If the volunteer's detail already includes an email address, the user account is created and the Volunteer user created message displays.

If the volunteer does not have an email address saved in the Volunteer Detail, the following dialog displays.



2. Enter an email address for the volunteer and click **Submit**.

The *Volunteer user created* message displays and an email with instructions on how to access the Volunteer Portal are sent to the email address.

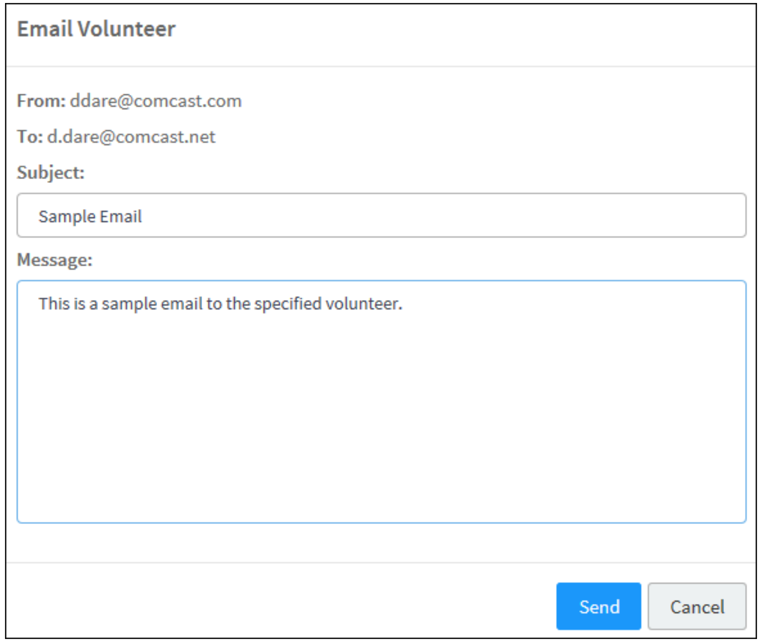
Note: If the volunteer's email is already associated with another user account, an error will display. You must use an email address that is not in use by the Raptor System.

Email Volunteer

Volunteer Coordinators can send an email to a specific volunteer from the **Volunteer Detail** workspace.

1. From the navigation menu, select **Modules > Volunteers**.
2. On the **All Volunteers** workspace, click the icon next to the volunteer's name to expand the **Volunteer Detail**.
3. Click **Send Email**.
4. Enter the email **Subject** and **Message**, and then click **Send**.

Note: The **To** field (email recipient) will not be populated if the Email field in the Volunteer Profile does not contain a value.



Deactivate/Activate All Volunteers

Users can deactivate and activate all volunteers from the **All Volunteers** workspace. You can perform this action at the client level (All Buildings) or for a specific building.

Deactivate Active Volunteers

Perform the following steps to deactivate all active volunteers.

1. From the navigation menu, select **Modules > Volunteers**.
2. Select the building or All Buildings from the Building Selector.
3. On the **All Volunteers** workspace, click **Action > Deactivate All**.
4. On the **Deactivate Volunteers Confirmation** dialog, click **Submit**.

   A confirmation displays stating all volunteers have been deactivated.

Activate All Volunteers

Perform the following steps to activate all inactive volunteers.

1. From the navigation menu, select **Modules > Volunteers**.
2. Select the building or All Buildings from the Building Selector.
3. On the **All Volunteers** workspace, click **Action > Activate All**.
4. On the **Activate Volunteers Confirmation** dialog, click **Submit**.

   A confirmation displays stating all volunteers have been activated.

Reset All Hours

Users can reset volunteer hours for the district, building or an individual volunteer. The Reset All Hours feature clears the volunteer's tracked hours and reset the count to zero.

The **Reset All Hours** feature can be used to reset all volunteers based on the value in the building selector (for example district-wide or building-wide), or for an individual volunteer.

Note: Resetting a volunteer's hours at any level will reset the hours across all buildings for that volunteer.

Reset All Hours from Volunteer Detail

In the **Volunteer Detail** workspace for an individual volunteer, the **Reset Hours** button resets the hours for the volunteer and clears the **Hours Logged** data grid for the volunteer.

When the **Reset Hours** button is clicked, a message displays summarizing the action, and the ability to **Submit** or **Cancel** the action.

Resetting volunteer hours at any of the levels does not affect the user's ability to report on volunteer hours prior to the reset date.

Reset All Volunteer Hours

Users can also reset all volunteer hours from the **All Volunteers** workspace.

1. From the navigation menu, select **Modules > Volunteers**.
2. On the **All Volunteers** workspace, click **Action > Reset All Hours**.
3. On the **Reset All Hours Confirmation** dialog, click **Submit**.

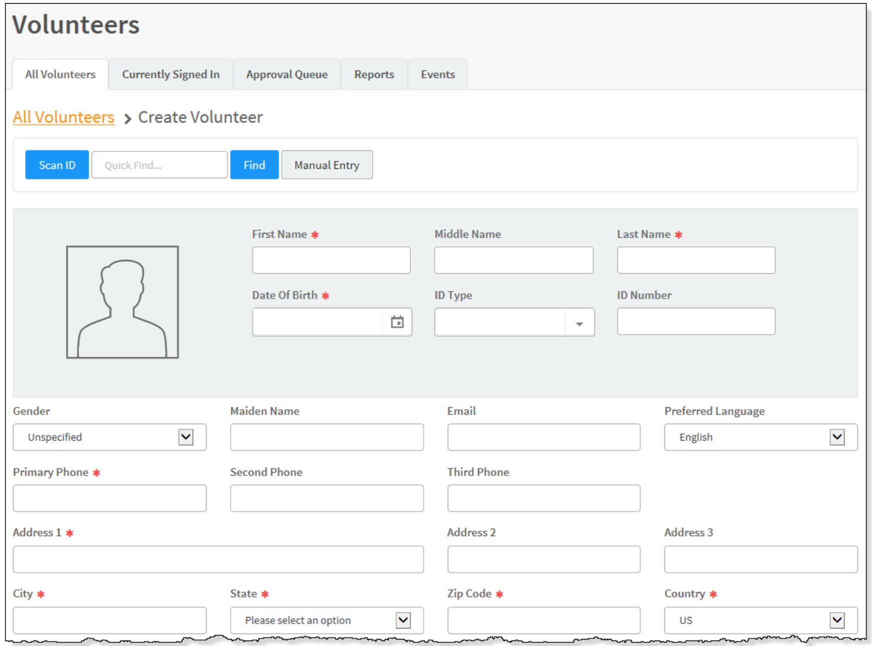
WARNING!

This action will reset the hours for all volunteers at All Buildings.

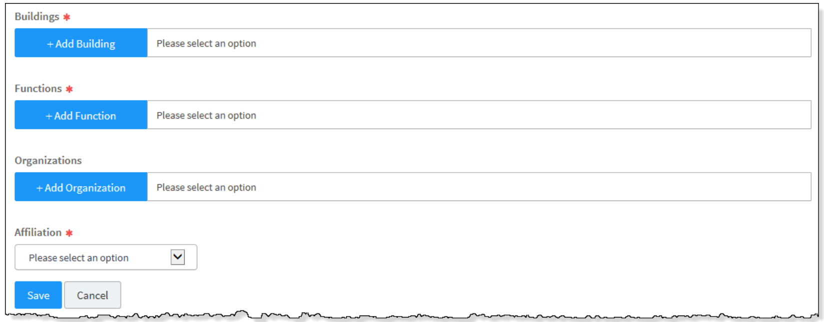
Create Volunteer

A volunteer application must be completed and approved before the applicant can participate as a volunteer. The operator assisted application is available from the **All Volunteers** tab.

1. From the navigation menu, select **Modules > Volunteers**.
2. On the **All Volunteers** tab, click **Action > Create Volunteer**.
3. Add the volunteer's information by one of these methods: **Scan ID**, **Find** (if previously scanned or have an official record) or **Manual Entry**.
4. In the lower portion of the screen, specify the **Buildings*** the volunteer is allowed to visit, the **Functions*** the person is volunteering for, the **Organizations** they are associated with, and their **Affiliations*** to a student in



Note: Only the functions created at the All Buildings level and for the specific buildings selected will be available.



5. Click **Save**.

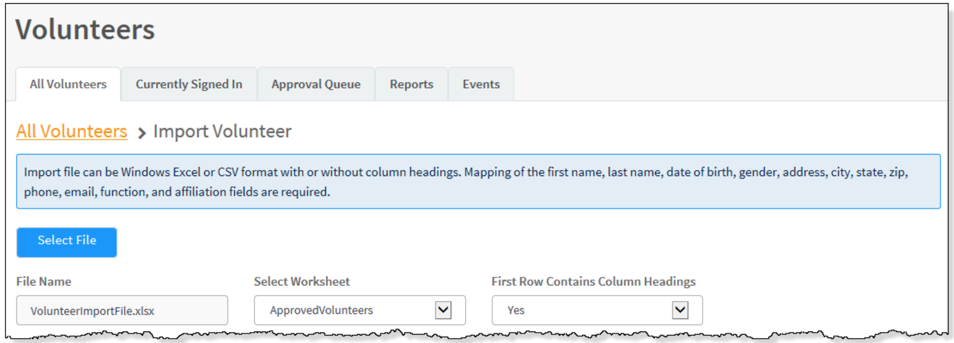
   A message displays indicating the application was successfully saved.

Import Approved Volunteers

For Administrators with the *Can Import Volunteers* permission, the Import Volunteers utility enables you to import a list of pre-approved volunteers into the Raptor system (they do not go through the approval process). It also includes the ability for unattended import of volunteers by creating a manifest file that includes information about the field mapping and file to be imported.

Note: To use the Import feature, you must first create an Excel spreadsheet or comma delimited file that contains the required information. The use of special characters in an Excel formatted import file may cause unexpected results.

1. In the navigation menu, select **Modules > Volunteers**, and then click **Import > Approved Volunteers**.
2. Click **Select File**, navigate to the **Excel** or **CSV** file and click **Open**.
3. If you used Excel and the file contains multiple worksheets, select the worksheet that contains
   the volunteer information from the **Select Worksheet** drop-down list.
4. If the first row of the worksheet contains column headings, select the **Yes** from the **First Row Contains Column Headings** drop-down list and this row will not be imported. Otherwise, select **No**.



The file can contain the following Volunteer information to be imported:

- First Name*
- Last Name*
- Middle Name
- Date of Birth*
- ID Number
- Gender*
- Address*/City*/State*/Zip Code*
- Primary Phone*
- Email*
- Function*
- Affiliation*
- Organization

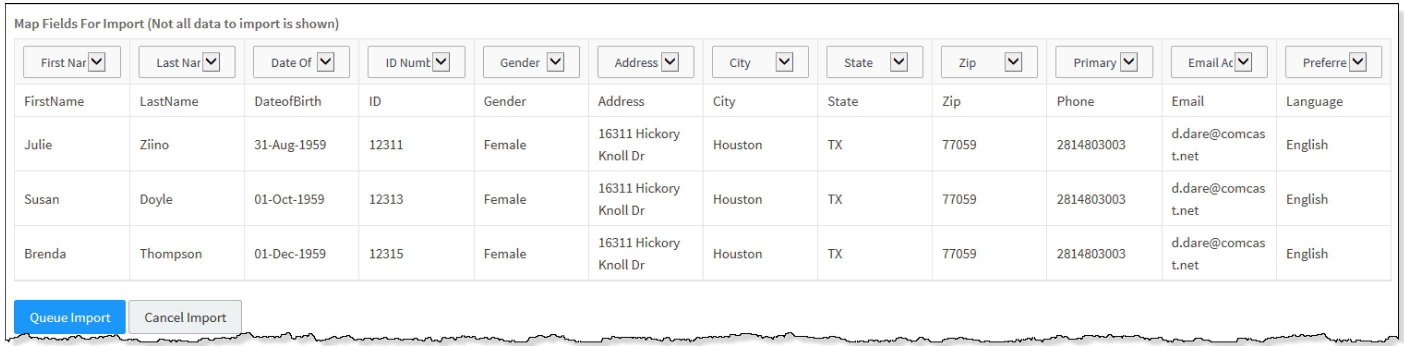
*Indicates required information.

Note: To import multiple Functions and/or Organizations, enter all items into the appropriate Excel cell of your import file, separating each function and or organization with a vertical bar (|). For example, if you have multiple functions, in the Function cell, enter Hall Monitor | Mentor.

Import Approved Volunteers, cont.

5. Map each of the columns to be imported by selecting the appropriate field in the drop-down menu above each column that displays. First Name, Last Name, Date of Birth, Gender, Address/City/State/Zip Code, Primary Phone, Email, Function and Affiliation are required columns. are required columns.

   Note: The columns with **Ignore** selected with not be imported.



Map Fields For Import (Not all data to import is shown)

First Nar	Last Nar	Date Of	ID Numb	Gender	Address	City	State	Zip	Primary	Email Ac	Preferre
FirstName	LastName	DateofBirth	ID	Gender	Address	City	State	Zip	Phone	Email	Language
Julie	Ziino	31-Aug-1959	12311	Female	16311 Hickory Knoll Dr	Houston	TX	77059	2814803003	d.dare@comcast.net	English
Susan	Doyle	01-Oct-1959	12313	Female	16311 Hickory Knoll Dr	Houston	TX	77059	2814803003	d.dare@comcast.net	English
Brenda	Thompson	01-Dec-1959	12315	Female	16311 Hickory Knoll Dr	Houston	TX	77059	2814803003	d.dare@comcast.net	English

Queue Import | Cancel Import

6. If you want to create a manifest file to schedule automatic imports, click **Save Manifest** and save the file. You can then schedule the imports using a scheduling utility.

7. Click **Queue Import**.

   A message displays in the lower right corner of the screen stating that the import job was successfully added to the import queue for processing.

   When the import has completed processing, an email will be sent to the email address of the user indicating the number of records successfully imported and any error that may have occurred.

Import Volunteer Applications

You can import a list of volunteer applications into the Raptor system for a specific building. The applications are sent to the **Approval Queue** where the Volunteer Coordinator can decide to approve or deny the application. If approved, the volunteer record is created in the system.

Note: To use this feature, you must first create an Excel spreadsheet or comma delimited file that contains the required information. The use of special characters in an Excel formatted import file may cause unexpected results.

1. From the navigation menu, select **Modules > Volunteers**, and then click **Import > Applications**.
2. Click **Select File**, navigate to the **Excel** or **CSV** file and click **Open**.
3. If you used Excel, select the worksheet from the **Select Worksheet** drop-down.
4. If the first row of the worksheet contains column headings, select the **Yes** from the **First Row Contains Column Headings** drop-down list and this row will not be imported. Otherwise, select **No**.
5. Map each of the columns to be imported by selecting the appropriate field in the drop-down menu above each column that displays. First Name, Last Name, Date of Birth, Gender, Address/City/State/Zip Code, Primary Phone, Email, Function and Affiliation are required columns. The columns with **Ignore** selected will not be imported.
6. If you want to create a manifest file to schedule automatic imports, click **Save Manifest** and save the file. You can then schedule the imports using a scheduling utility.
7. Click **Queue Import**. A message displays indicating the import job was successfully added to the import queue for processing. When completed, an email will be sent to the email address of the user indicating the number of records successfully imported and any error that may have occurred.

The file can contain the following Volunteer information to be imported:

- First Name*
- Last Name*
- Middle Name
- Date of Birth*
- ID Number
- Gender*
- Address*/City*/State*/Zip Code*
- Primary Phone*
- Email*
- Function*
- Affiliation*
- Organization

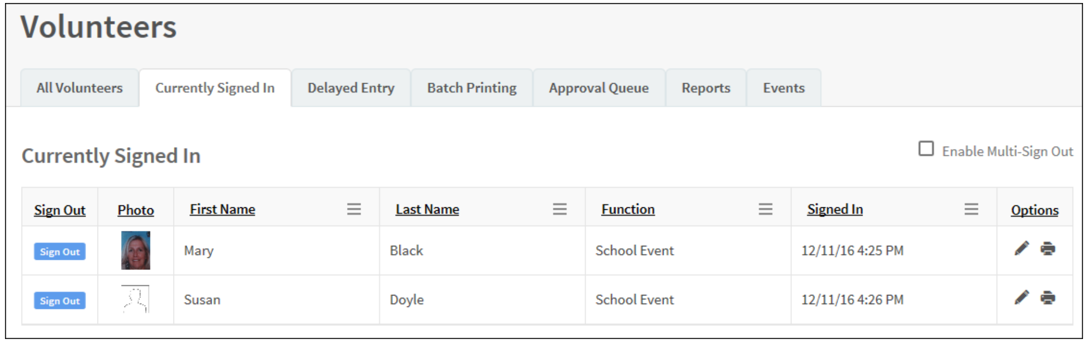
*Indicates required information.

Note: To import multiple Functions and/or Organizations, enter all items into the appropriate Excel cell of your import file, separating each function and or organization with a vertical bar (|). For example, if you have multiple functions, in the Function cell, enter Hall Monitor | Mentor.

RAPTOR TECHNOLOGIES

Currently Signed In Volunteers

Use the **Currently Signed In** tab to view all volunteers who are currently signed in. You can also perform the following tasks from this tab.



View Sign-In Information

View the volunteers who are currently signed in, the sign in date and time, and their function.

You can hover the cursor over the photo in the data grid to view an enlarged photo.

Print or Reprint Badge

If a volunteer has lost their badge or changed their destination, or the printer has malfunctioned, you can reprint their badge. In the **Options** column, click the icon to print or reprint the badge.

Sign Out Volunteers

You can sign out a single volunteer or multiple volunteers:

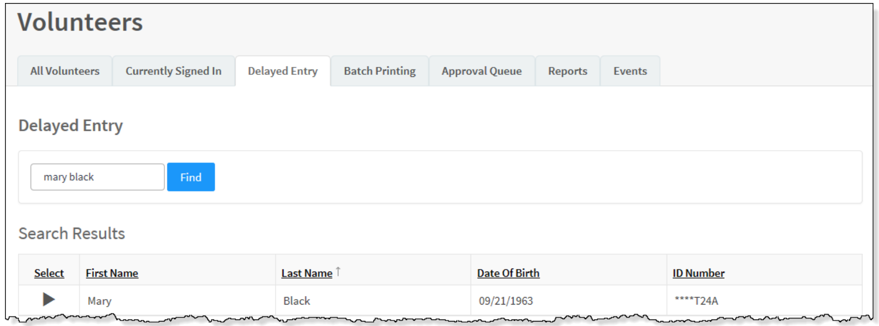
- To sign out a single volunteer, click **Sign Out** next to their name.
- To sign out multiple volunteers, select the **Enable Multi-Sign-Out** check box in the upper right corner, select the check box next to all the volunteers to be signed out, and then click **Sign Out**.

  To return to single sign-out mode, clear the **Enable Multi-Sign-Out** check box.

Delayed Sign In and Sign Out

If you are unable to sign in or sign out due to equipment issues or internet connection issues, you can use the **Delayed Entry** feature to manually enter the sign-in or sign-out date and time. This feature allows users with the *Can Sign In Volunteers* permission to record the actual sign-in or sign-out times but the entry is delayed until the system is available.

1. Select the school from the Building selector.
2. From the navigation menu, select **Modules > Volunteers** and then click the **Delayed Entry** tab.
3. Enter the **First Name** or **Last Name** and click **Find**.



4. Select the person from the search results and complete the following information:
   - **Sign-In and Sign-Out Date/Time** – Click the icon to select the date and then click the icon to select the time that the person actually signed in or signed out.
   - **Function*** – From the drop-down list, select the reason the volunteer is signing in.
   - **Organization** – From the drop-down list, select the organization associated with the volunteer.

5. Click **Submit**.

   A *Delayed Entry Successful* message displays in the lower right corner of the screen.

Note: This feature is not visible at the All Buildings level.

Batch Printing

The Batch Printing feature enables users to run a batch of volunteers through the sex offender and custom alert checks, and then print their badges in advance of a school event where many people are expected to sign in for the same event at the same time.

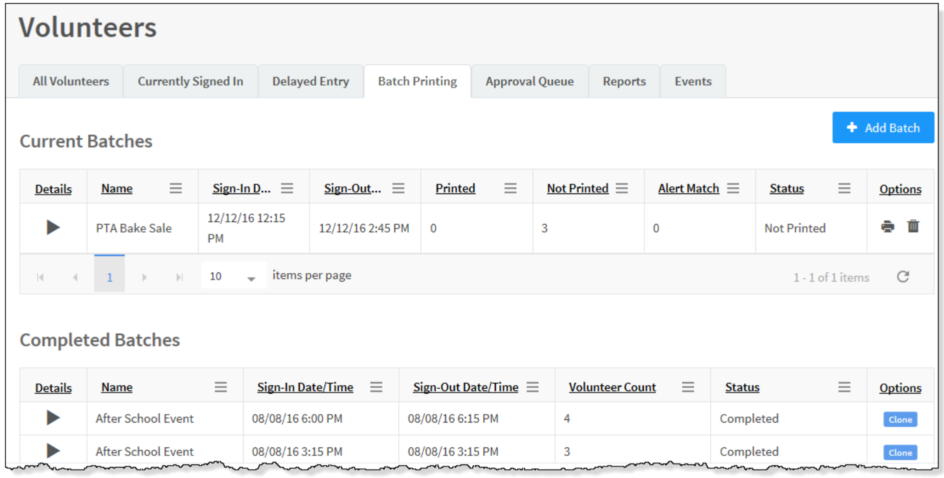
Using this feature speeds up the sign in process for an event and helps prevent a long line of people at the Front Desk. When the volunteers arrive, you simply look at their ID and hand them their badge.

While running the batch, if one or more volunteers are flagged with an offender or custom alert, the user can view the alerts and decide if the person is a match. If they are a match, no badge is created and they will not be signed in at the time designated in the Batch Detail.

Note: This feature is not visible at the All Building level.

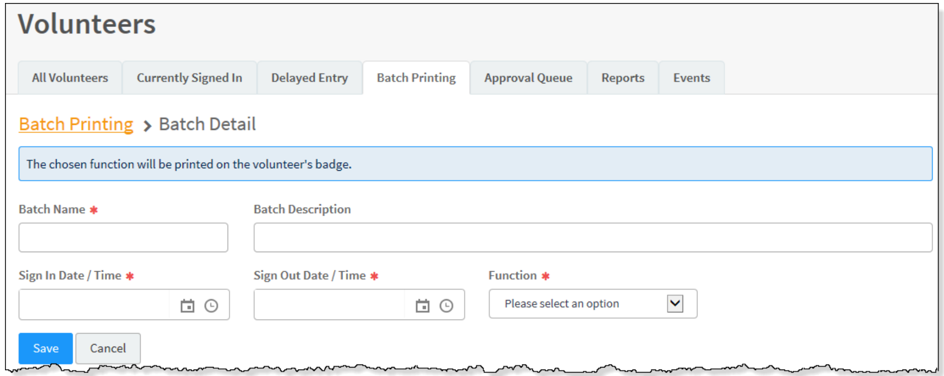
Add Batch Print Job

1. Select the school from the Building Selector (you must select a specific building).
2. From the navigation menu, select **Modules > Volunteers** and click the **Batch Printing** tab.



Batch Printing, cont.

3. Click **Add Batch**. You can also copy a Completed Batch job and modify it to create a new batch job.



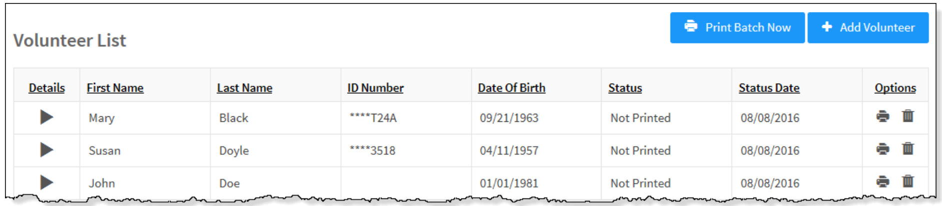
4. Enter the following information (the asterisk * indicates a required field):
   - **Batch Name*** – Enter a name for the batch job.
   - **Batch Description** – Enter a description for the batch job.
   - **Sign-In Date/Time*** – Click the icon to select the sign-in date and then click the icon to select the sign-in time.
   - **Sign-Out Date/Time*** – Click the icon to select the sign-out date and then click the icon to select the sign-out time.

     Note: The Sign-In Date and Sign-Out Date must be the same date.
   - **Function*** – From the drop-down list, select the reason the volunteer is signing in.
5. Click **Save**.

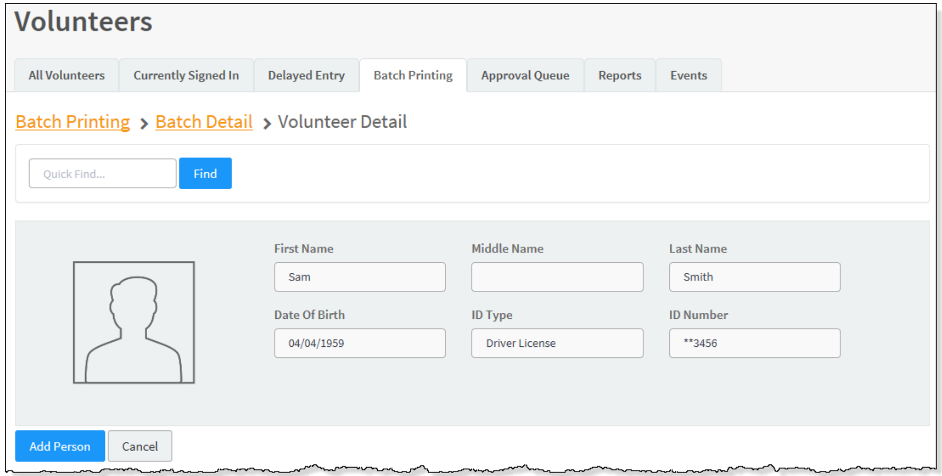
Batch Printing, cont.

6. In the **Volunteer List** area on the **Batch Detail** workspace, click **Add Volunteer**.

   Note: You can only add volunteers to the batch if they are in the Raptor system.



7. Enter the volunteer's name in the text box and then click **Find**.
8. In the search results, click **Select** next to the volunteer's name.
9. On the **Volunteer Detail** workspace, click **Add Person**.



10. Repeat Step 6 through Step 9 for all volunteers to be added to the batch.

Batch Printing, cont.

Execute Batch Printing

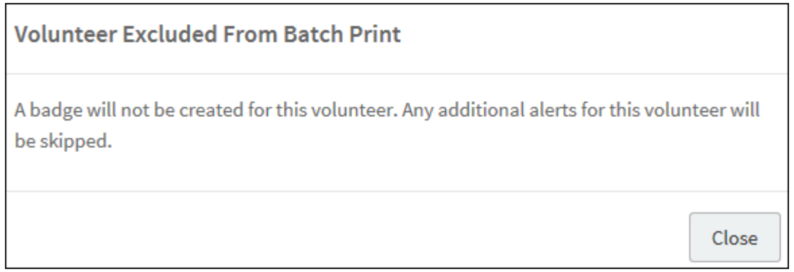
You can execute and print the batch from either the **Batch Printing** workspace or the **Batch Detail** workspace.

1. Use one of the following methods to execute and print the batch:
   - From the **Current Batches** area on the **Batch Printing** workspace, click the icon in the **Options** column to execute the batch.
   - From the **Volunteers List** area on the **Batch Print Details** workspace, click **Print Batch Now**.

   The Print Confirmation dialog displays.

2. Click **Continue**.
3. If a Possible Offender alert displays for any of the visitors in the batch, review the information and determine if it is a match.

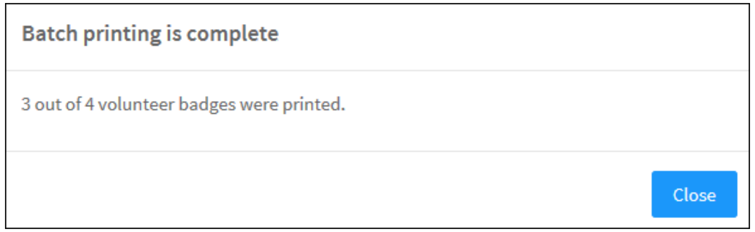
   If the visitor is a match to an offender or custom alert, the badge will not be printed and the following dialog displays.



Batch Printing, cont.

3. Click **Close** to exit the dialog and continue with the batch printing.

   When all the badges have printed, a dialog displays indicating the *Batch printing is complete* and displays how many badges were printed.

4. Click **Close** to exit the dialog.

   On the date and at the time specified in the Batch Print **Sign-In Date/Time**, the volunteer will be automatically signed in to the Raptor system.

   On the date and at the time specified in the Batch Print **Sign-Out Date/Time** field, the volunteers will be automatically signed out.

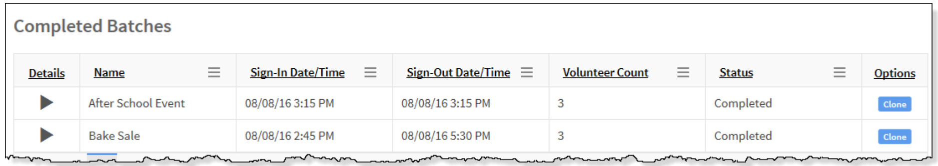
   Note: A batch print is not complete until both the sign-in and sign-out times have elapsed. Up until the sign-out time has elapsed, the batch print is still considered active and can be modified.

   Once the sign-out time has elapsed, the batch print is considered complete and will be moved to the **Completed Batches** grid.

Cloning Batch Print Job

The Clone Batch feature enables you to copy a Completed Batch job and modify it to create a new batch job. Perform the following procedure to clone a batch print job:

1. Select the school from the Building Selector (you must select a specific building).
2. From the navigation menu, select **Modules > Volunteers** and then click the **Batch Printing** tab.
3. In the **Completed Batches** area, click **Clone** in the **Options** column for the batch job you want to copy.



Completed Batches

Details	Name	Sign-In Date/Time	Sign-Out Date/Time	Volunteer Count	Status	Options
▶	After School Event	08/08/16 3:15 PM	08/08/16 3:15 PM	3	Completed	Clone
▶	Bake Sale	08/08/16 2:45 PM	08/08/16 5:30 PM	3	Completed	Clone

4. On the **Batch Detail** workspace, enter the following information (asterisk * indicates a required field):
   - **Batch Name*** – Optionally, modify the batch job name.
   - **Batch Description** – Optionally, modify the description for the batch job.
   - **Sign-In Date/Time*** – Click the icon to select the sign-in date and then click the icon to select the sign-in time.
   - **Sign-Out Date/Time*** – Click the icon to select the sign-out date and then click the icon to select the sign-out time.

     Note: The Sign-In Date and Sign-Out Date must be the same date.
   - **Function*** – From the drop-down list, select the reason the volunteer is signing in.
5. Click **Save**.

Approval Queue

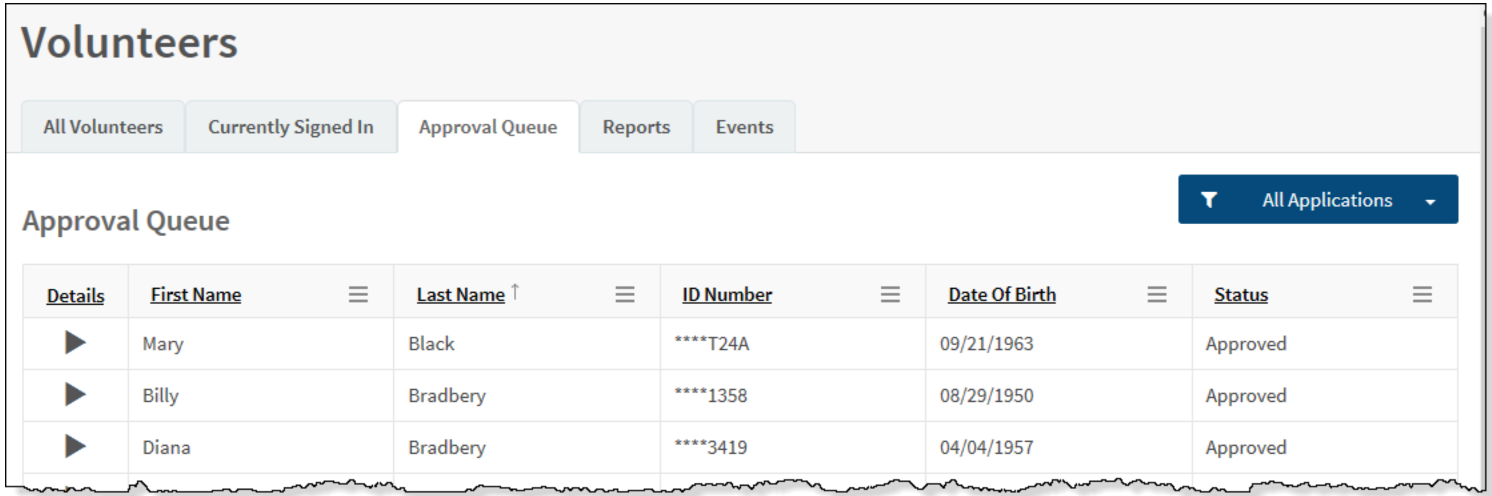
The **Approval Queue** tab is used by the Volunteer Coordinator to approve or deny imported volunteer applications, and to review the application history log to see the status of an application.

If you have the Raptor Volunteer Management System enabled and the *Automatically Approve When Requirements Satisfied* feature enabled, only those applications that do not meet the approval requirements will display in the **Approval Queue** for manual approval (**Pending Applications**).

If you have the Raptor Volunteer Management System enabled, you can view the reason these applications were flagged in the **Application History Log** section on the workspace before you approve the application.

If you only have the Raptor System enabled, proceed to Approve Volunteer Applicants.

You must have the *Can Approve Volunteers* permission to see this tab.



View Application History Log

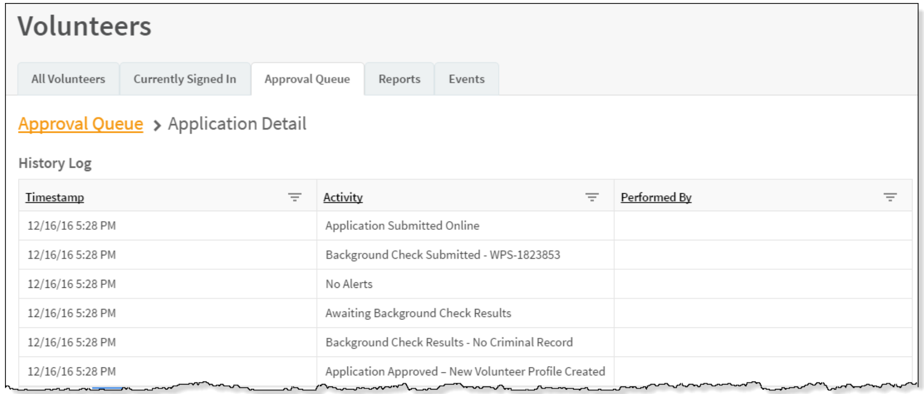
Users with the *Can Approve Volunteers* permission can view a detailed log of a volunteer’s application as it goes through the approval process. This allows the user to view the current state and take action if required.

Note: This feature is only available if the Raptor Volunteer Management System enabled.

1. From the navigation menu, select **Modules > Volunteers** and then click the **Approval Queue** tab.
2. From the **Filter** drop-down list in the upper right corner, select the volunteer applications to display (Pending Applications, Approved Applications, Denied Applications, or All Applications).
3. In the **Details** column, click the ▶ icon for the volunteer applicant.
4. On the **Application Detail** workspace, view the **History Log** of the volunteer’s application.

   The History Log includes the date and time of the activity, the activity description and the Username of the user performing the activity:

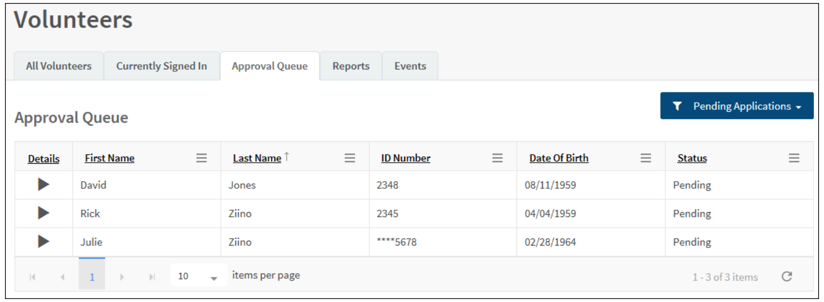
   - Application Submitted Online
   - Background Check Submitted
   - Alerts Ready for Review
   - No Alerts
   - Awaiting Background Check Results
   - Background Check Results Ready for Review
   - Background Check Results – No Criminal Record
   - Application Approved

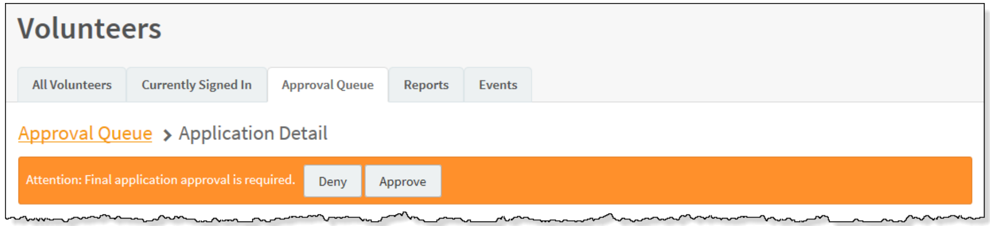


Approve Volunteer Applicants

Volunteer Coordinators can manually approve or deny a volunteer application from the Approval Queue.

1. From the Building Selector, select the building or **All Buildings**.
2. From the navigation menu, select **Modules > Volunteers** and then click the **Approval Queue** tab.
3. From the **Filter** drop-down list in the upper right corner, select Pending Applications.
4. In the Details column, click the ▶ icon for the volunteer applicant.
5. If no alerts are generated for the applicant, click **Deny** or **Approve** in the banner.





- If you click **Approve**, the **Approval Confirmation** dialog displays. Click **Submit** to approve the application or **Cancel** to cancel the action.
- If you click **Deny**, the **Reason for denial** dialog displays. Enter the reason why the application has been denied and then click **Continue**. If you want to cancel your action, click **Cancel**.

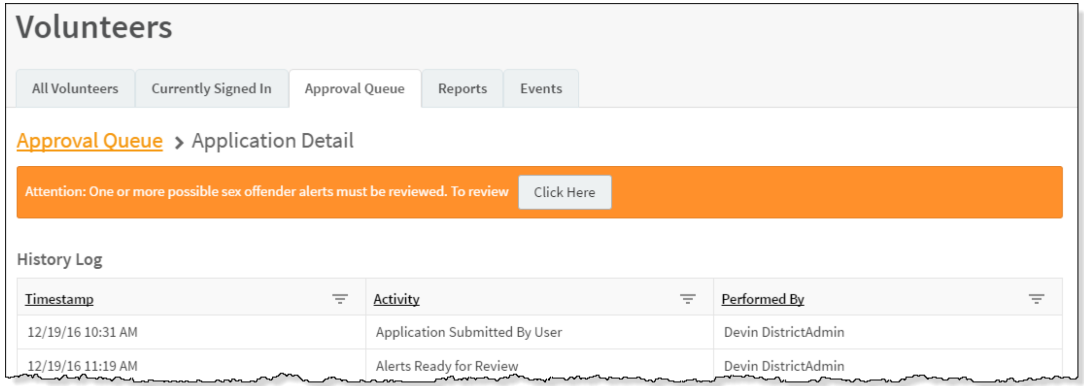
If the Volunteer Portal is enabled, a user account will be automatically created for the Volunteer Portal and an email with instructions on how to log in is sent to the volunteer applicant. If the automated process is unable to create a Volunteer Portal user account, the volunteer coordinator can manually create a user account for the Volunteer Portal.

Possible Offender Alert for Applicant

If a Possible Offender Alert is generated from a volunteer applicant, the volunteer coordinator will be prompted to review the information before approving the applicant.

Note: The Offender Check for volunteer applications feature must be enabled by Raptor.

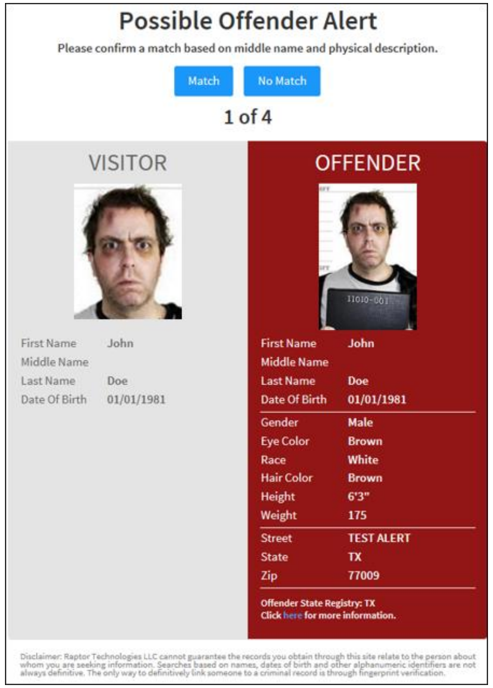
1. On the **Application Detail** workspace, click the **Click Here** button in the banner.



2. Analyze the search results. Because there can be multiple possible matches, it is very important that you carefully compare the information displayed on the screen for **Your Volunteer Applicant** and the **Offender Alert** information.

   It is recommended that you compare the middle name, height, weight, race, and other physical details to verify a match. Not all states provide a photo and details of their offenders.

   Note: Raptor also matches on offender alias names. If this occurs, an *Alias Match* message displays below the offender's photo.



Possible Offender Alert for Applicant

3. Confirm whether the information displayed on your screen is a match to the person being signed in. Perform one of the following actions:

   Match

   If the information displayed on the screen is a match, click **Match**.

   You are prompted to confirm the match. Click **Yes**, it is a match to confirm, or click **Cancel**.

   Follow your school/district policies and procedures for handling alerts. The relevant response personnel and a Raptor technician are notified.

   The number of matches and the number of total Possible Offender Alerts are recorded in the History Log on the Volunteer Application, which will force the application to be manually approved (if the *Automatically Approve When Requirements Satisfied* feature is set to **Yes** on the **Volunteer Application Settings** workspace).

   No Match

   If the information displayed on the screen does not match your visitor's information, click **No Match**. If there are multiple records, the next possible match will display on the screen.

   When **No Match** is selected, the record for that person is flagged by Raptor on the backend so that it does not display on subsequent sign ins.

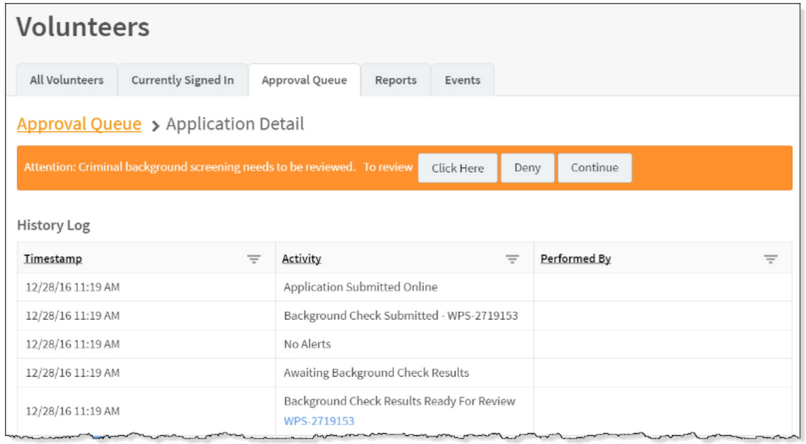
4. After the applicant has been reviewed, the volunteer coordinator can approve or deny the application using the instructions in Approve Volunteer Applicants.

Criminal Background Screening

If the Criminal Background Screening feature is enabled and a criminal record is returned for a volunteer applicant, the volunteer coordinator will receive an email indicating that a volunteer application needs your attention.

1. From the Building Selector, select the building or **All Buildings**.
2. From the navigation menu, select **Modules > Volunteers** and then click the **Approval Queue** tab.
3. From the **Filter** drop-down list in the upper right corner, select **Pending Applications**.
4. In the **Details** column, click the icon for the volunteer applicant.

   If the criminal background screening determines that the application needs additional review, the *Criminal background screening needs to be reviewed* displays on a banner on the **Application Detail** workspace and an entry *Background Check Results Ready For Review* is logged in the History Log.



Note: The user must have the *Can View Background Check Information* permission to view the criminal record for an applicant.

Criminal Background Screening, cont.

5. Perform one of the following actions depending on your permissions:

   View Criminal Background

   If you have the *Can View Background Check Information* permission:

   a. Click the **Click Here** button to review the criminal background search results.

   b. After reviewing the criminal record, click **Deny** or **Continue**.

      If you click **Deny**, the **Reason for denial** dialog displays. Enter the reason why the application has been denied and then click **Continue**. If you want to cancel your action, click **Cancel**.

      If you click **Continue**, the application is approved if the *automatically approve applications* feature is enabled.

   Manually Approve Application

   If the *automatically approve applications* feature is disabled, you are prompted to manually approve or deny the application.

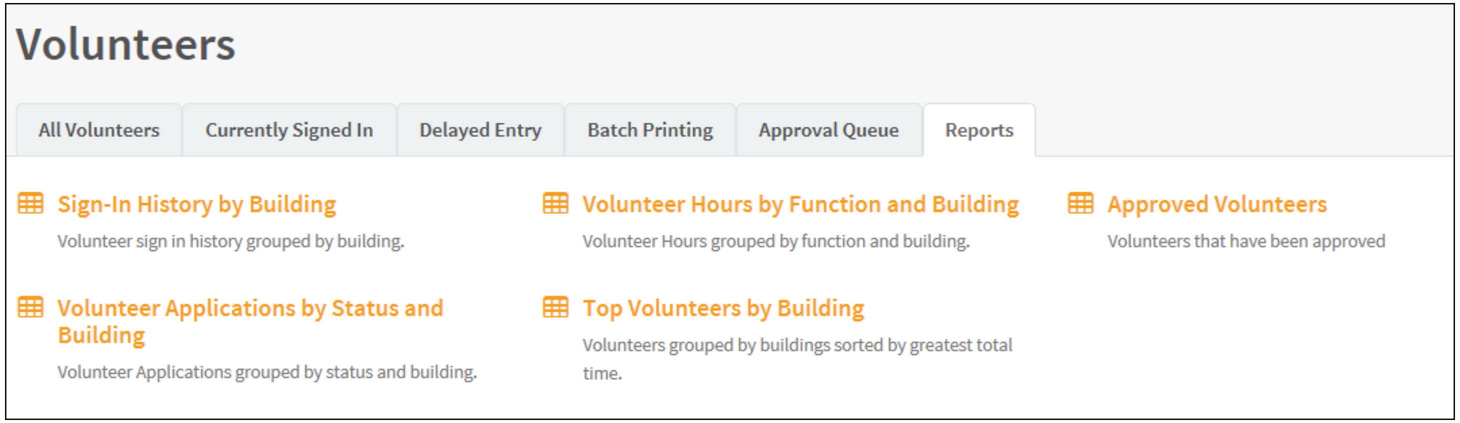
   On the **Application Detail** workspace, click **Deny** or **Approve** in the banner.

   - If you click **Approve**, the **Approval Confirmation** dialog displays. Click **Submit** to approve the application or **Cancel** to cancel the action.
   - If you click **Deny**, the **Reason for denial** dialog displays. Enter the reason why the application has been denied and then click **Continue**. If you want to cancel your action, click **Cancel**.

Note: For active volunteers that have submitted new applications that have been approved, the volunteer's profile will not be updated with the information on the new application until their expiration date, at which time their volunteer profile will be replaced with information from the newly approved application.

Volunteer Reports

Use the **Reports** tab to run reports for volunteer activity. The following Volunteer reports are available:

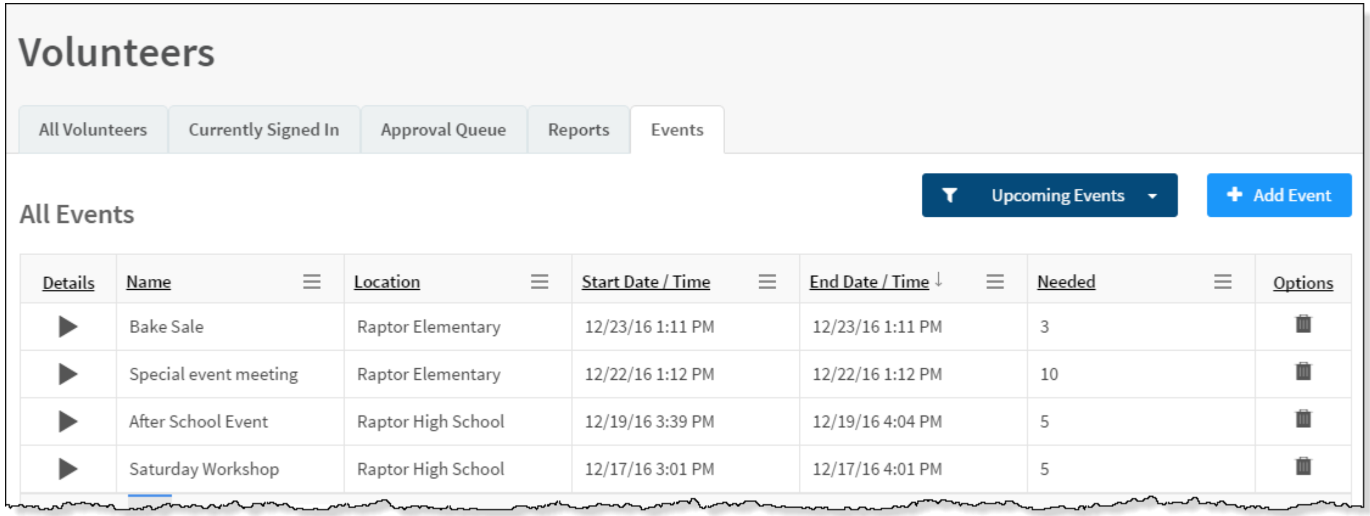


- **Sign-In History by Building** – Volunteer sign in history grouped by building.
- **Volunteer Hours by Function and Building** – Volunteer hours grouped by function and building.
- **Approved Volunteers** – Volunteers that have gone through the approval process.
- **Volunteer Status by Applications and Building** – Volunteer applications grouped by status and building.
- **Top Volunteers by Building** – Volunteers grouped by buildings and sorted by greatest total time.

See Reports for more information.

Volunteer Events

The **Events** tab is used by the Volunteer Coordinator to manage events, such as creating an event, viewing all events, modifying an event and deleting an event. You must have the *Can Manage Events* permission and the Raptor Volunteer Management System enabled to see this tab.

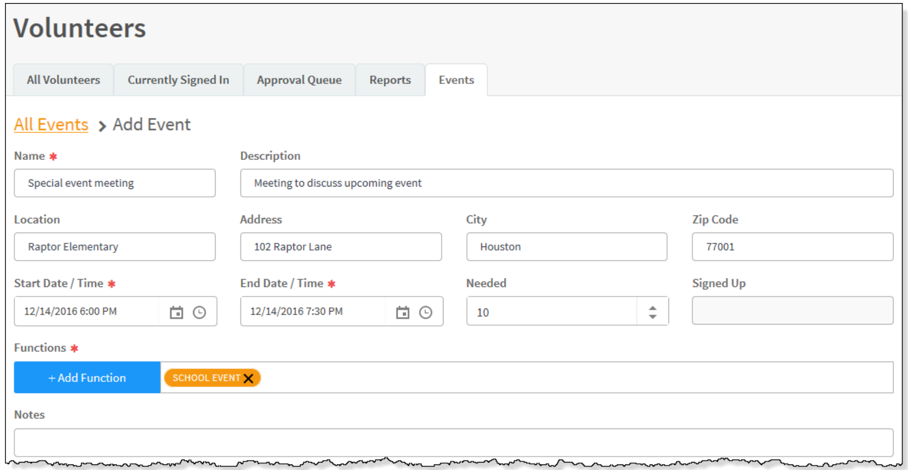


You can view all the events on the **All Event** workspace. Use the **Filter** drop-down to narrow the search for specific events. You can filter to display Scheduled Events, Past Events and All Events.

Add Volunteer Events

Volunteer events can be created at the building level or client level (All Buildings).

1. From the navigation menu, select **Modules > Volunteers** and then click the **Events** tab.
2. On the **All Events** workspace, click **Add Event**.



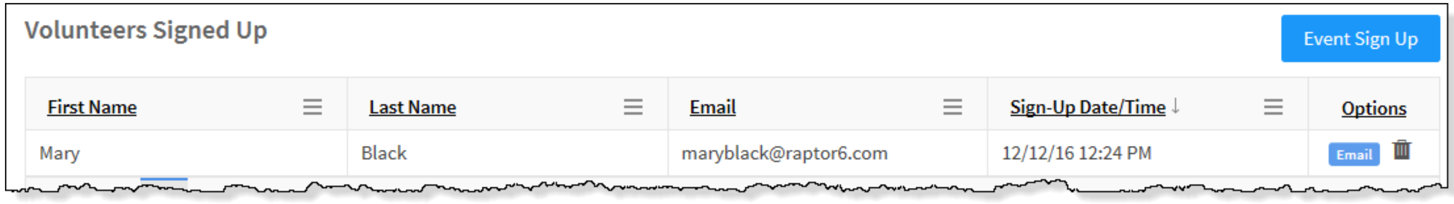
3. Complete the following fields:
   - Name* – Name for the event.
   - Description
   - Location – Building where event occurs
   - Address – Physical address
   - City/Zip Code
   - Start Date/Time* – Click the icon to select the date of the event and then click the icon to select the time the event starts.
   - End Date/Time* – Click the icon to select the date the event ends and then click the icon to select the time the event ends.
   - Needed – Select the number of volunteers needed to help with the event.
   - Signed Up – This *read-only* field indicates the number of volunteers who have already signed up for the event.
   - Functions* – Click **Add Function** and select the type of event from the drop-down list.
   - Notes – Enter any additional notes about the event.
4. Click **Save**.

View Volunteers Signed Up for Event

Volunteer Coordinators can view who has signed up to volunteer for an event from the **Event Detail** workspace.

Note: You must have the Raptor Volunteer Management System enabled to see this feature.

1. From the navigation menu, select **Modules > Volunteers** and then click the **Events** tab.
2. On the **All Events** workspace, click the icon next the event you want view.
3. On the **Event Detail** workspace, you can view the number of volunteers who have signed up for the event in the **Signed Up** field in the upper portion of the workspace.
4. Navigate to the **Volunteers Signed Up** area to view the volunteers who have signed up for the event.


Volunteers Signed Up

Event Sign Up

First Name	Last Name	Email	Sign-Up Date/Time	Options
Mary	Black	maryblack@raptor6.com	12/12/16 12:24 PM	Email

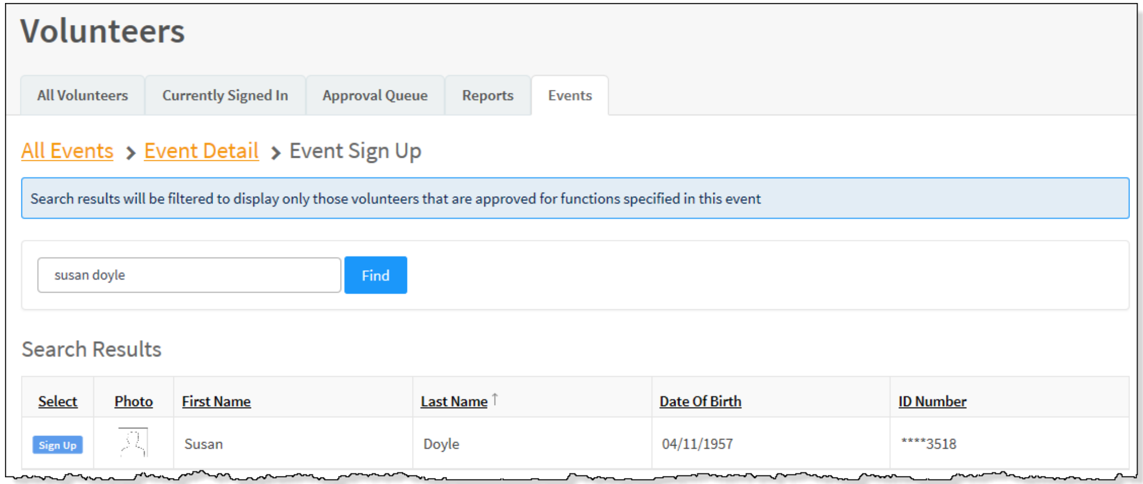
To remove a volunteer who has signed up for an event and reset the **Signed Up** number to reflect the change, click the icon and then click **Yes** on the **Removal Confirmation** dialog.

Sign Up Volunteers for Event

Volunteer Coordinators can view who has signed up to volunteer for an event from the **Event Detail** workspace.

Note: You must have the Raptor Volunteer Management System enabled to see this feature.

1. From the navigation menu, select **Modules > Volunteers** and then click the **Events** tab.
2. On the **All Events** workspace, click the ▶ icon next the you want to add volunteers.
3. On the **Event Detail** workspace, navigate to the **Volunteers Signed Up** area and click **Event Sign Up**.
4. Enter the volunteer's **First** and/or **Last Name** in the text field and click **Find**.



5. In the **Search Results** area, click **Sign Up** next to the volunteer's name.

   Note: Only those volunteers that match the search criteria and the Functions selected in the event detail will be returned in the Search Results.

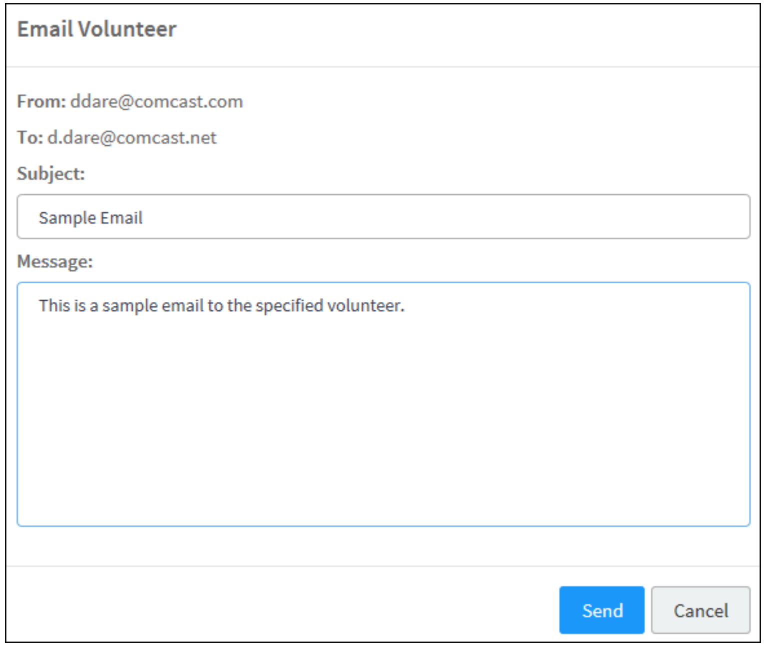
   The volunteer displays in the **Volunteers Signed Up** area for the event and the number in the **Signed Up** field in the event detail increments.

Email Volunteers Signed Up for Event

Volunteer Coordinators can send an email to those volunteers who have signed up for an event from the Event Detail workspace.

1. From the navigation menu, select **Modules > Volunteers** and then click the **Events** tab.
2. On the **All Events** workspace, click the ▶ icon next to the event to expand the **Event Detail**.
3. In the **Volunteers Signed Up** area, click **Email** for the volunteer who you want to send an email.

   Note: If the volunteer does not have an email address in their profile, the **Email** button does not display.
4. Enter the email **Subject** and **Message**, and then click **Send**.



Remove Volunteer from Event

Event Coordinators can remove a volunteer who is signed up for an event and reset the **Signed Up** number to reflect the change on the **Event Detail** workspace.

1. From the navigation menu, select **Modules > Volunteers** and then click the **Events** tab.
2. On the **All Events** workspace, click the ▶ icon next to the event to expand the **Event Detail**.
3. In the **Volunteers Signed Up** area, click the icon and click **Yes** on the **Removal Confirmation** dialog.
4. The **Email Removed Volunteer** dialog displays to send the volunteer an email that they have been removed from the event. Complete the **Message** and click **Send**.

   If the volunteer does not have an email address in their profile, the **To** field displays *null*. Click **Cancel** to cancel the email.