# Raptor University

## Raptor v6.1.5 Volunteer Management

Instructor:

# Table of Contents

This document provides information for using the Volunteer Management features in Raptor.

The following topics are covered in this presentation:



**Note:** The screens and instructions in this section apply to users with District Volunteer and Building Volunteer Coordinators unless otherwise indicated.

RAPTOR TECHNOLOGIES

# Raptor Volunteer Management

Welcome to Raptor Technologies®, the nation's leading provider of integrated school safety technologies. Our mission is to protect every child, every school, every day.

The Raptor Volunteer Management System streamlines the volunteer process from application to screening applicants to tracking hours to reporting.

First, volunteers applicants apply in an easy-to-use, customizable application. They are then checked for sex offender status and criminal background. Finally, the applications are compiled for easy review and approval. Hours are automatically tracked when the volunteer signs in and out of a building, or the volunteer can self-enter their hours and sign up for events in Raptor's Volunteer Portal. A variety of reports—including volunteer hours and top volunteers—can quickly be accessed and exported.

# Manage Volunteer Module Settings

Users with Administrative permissions can manage what displays in the Volunteer module using the **Volunteers** tab on the **Module Settings** workspace. The **Volunteers** tab includes a drop-down menu where you can select the workspace in which you want to navigate:

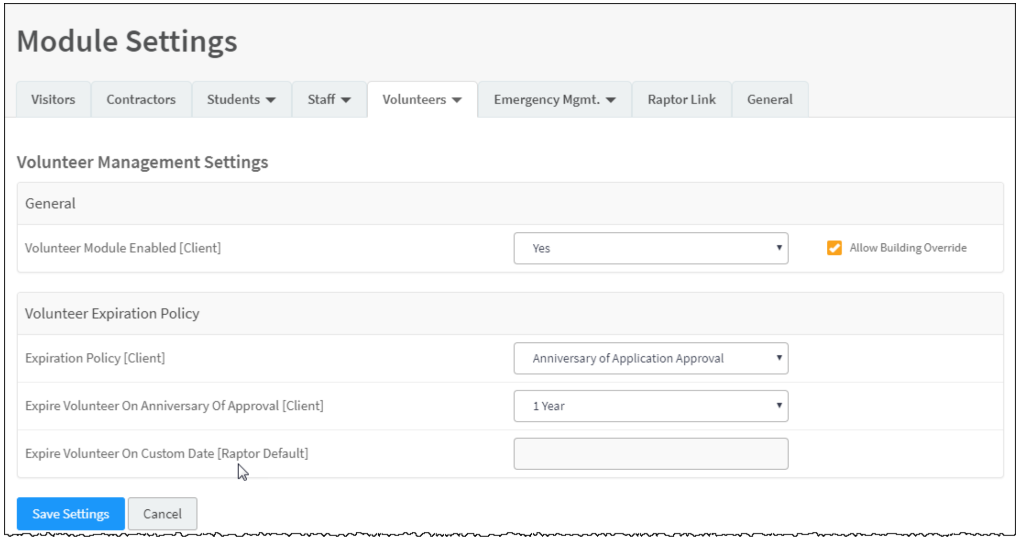
- Volunteer Management Settings – This workspace is used to manage what displays on the Volunteer workspace, including volunteer expiration policy, functions, organizations, affiliations, and custom profile fields.
- Volunteer Sign-In/Sign-Out Settings – This workspace is used manage volunteer sign-in and sign-out settings.
- Volunteer Application Settings – This workspace is used to manage volunteer application settings, notifications and customize online volunteer application features.
- Volunteer Portal Settings – This workspace is used to manage the volunteer portal settings.
- Event Management Settings – This workspace is used to enable volunteer event management.

# Volunteer Management Settings

The Volunteer Management Settings workspace is used to specify volunteer module settings. To access this workspace, select **Admin > Module Settings** in the navigation menu and then click the **Volunteer** tab and select **Volunteer Management**.

From this workspace, you can perform the following tasks:

- Enable/Disable Volunteer Management
- Specify Volunteer Expiration Policy
- Manage Functions
- Manage Requirements
- Manage Organizations
- Manage Affiliations
- Add Custom Profile Fields
- Modify Custom Profile Fields



# Enable/Disable Volunteer Management

By default, Raptor is configured with the Volunteer Management feature enabled. It can be disabled to hide Volunteer features in the navigation menu, Reports workspace and Volunteer dashboards.

Perform the following steps to enable or disable the Volunteer Management feature:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Management** from the drop-down menu.
3. In the **Volunteer Module Enabled** field, select **Yes** (to enable) or **No** (to disable).
4. Select the **Allow Building Override** check box if the setting can be overridden at the building level. Otherwise, clear the check box.
5. Click **Save Settings**.
6. Log out of Raptor and then log in to see the change.

**Note:** If you disable the Volunteer Module, all associated features will be also be disabled (Volunteer Management, Volunteer Sign In/Out, Volunteer Application, Volunteer Events, and Volunteer Portal). Subsequently, when you enable the Volunteer Module, you will then need to enable all of the other features that were previously disabled.

# Volunteer Expiration Policy

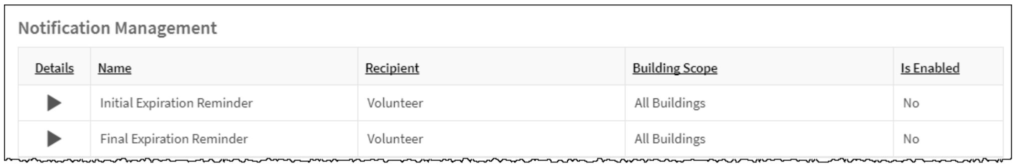
Users with Administrative permissions can specify when a volunteer's ability to volunteer for functions will automatically expire, at which time they will be required to resubmit a volunteer application.

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Management** from the drop-down menu.
3. In the **Volunteer Expiration Policy** area, specify the following information:
   - **Expiration Policy** – Select one of the following options from the drop-down list to specify how the expiration policy will be implemented:
     - **None** – No expiration policy will be set for volunteers. If this option is selected, the **Expire Volunteer on Anniversary of Approval** and **Expire Volunteer On Custom Date** fields will be disabled (grayed out).
     - **Anniversary of Application Approval** – If this option is selected, Volunteers will be expired on the anniversary date of application approval. You must select the anniversary year in the **Expire Volunteer On Anniversary of Approval** field.
     - **Custom Date** – Select this option to be able to select a date from the calendar in the **Expire Volunteer On Custom Date** field to specify the expiration policy.
   - **Expire Volunteer On Anniversary of Approval** – This field is enabled if the **Expiration Policy** is set to **Anniversary of Application Approval**. From the drop-down list, select the anniversary year on which to expire the volunteer. By default, the expiration is set to 1 Year.
   - **Expire Volunteer On Custom Date** – This field is enabled if the **Expiration Policy** is set to **Custom Date**. From the calendar icon, select the date on which to expire the volunteer.
4. Click **Save Settings**.
5. Log out of Raptor and then log in to see the change.

# Manage Expiration Notifications

You can manage and customize volunteer expiration notifications from **Notification Management** grid on the **Volunteer Management Settings** workspace. Notifications can only be managed at the client level (All Buildings).

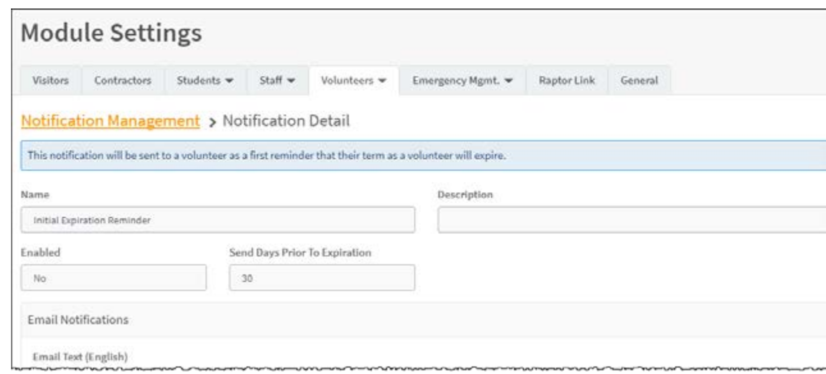
- **Initial Expiration Reminder** – Sent to volunteer as first reminder that their term as a volunteer will expire.
- **Final Expiration Reminder** – Sent to volunteer as final reminder that their term as a volunteer will expire.



Notification Management

| Details | Name | Recipient | Building Scope | Is Enabled |
|---|---|---|---|---|
| ▶ | Initial Expiration Reminder | Volunteer | All Buildings | No |
| ▶ | Final Expiration Reminder | Volunteer | All Buildings | No |

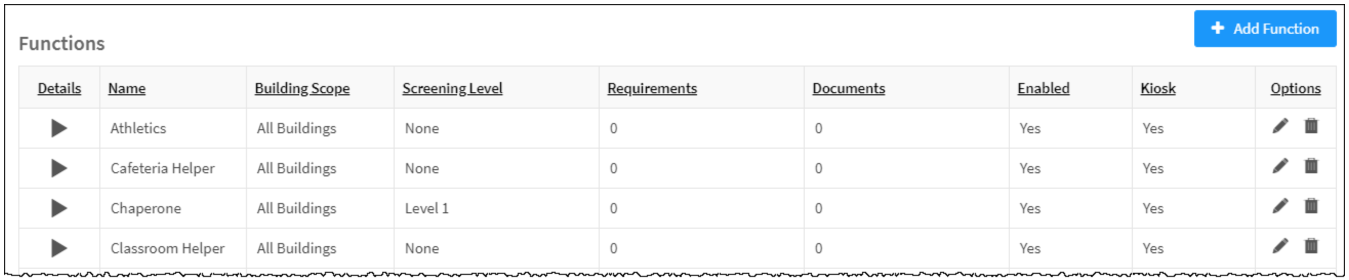
1. In the **Notification Management** area, click the ▶ icon in the **Details** column to expand the **Notification Detail**, and specify the following information:




   - **Name** – *Read-only*
   - **Description** – Optional description.
   - **Enabled** – Select **Yes** or **No** to indicate whether the notification is enabled (active).
   - **Send Days Prior To Expiration** – Select the number of days the notification is to be sent prior to the volunteer's expiration date.
   - **Email Text** – Use the default message that will be sent in an email or modify it with a custom email message.
2. Click **Save**.

# Add Functions

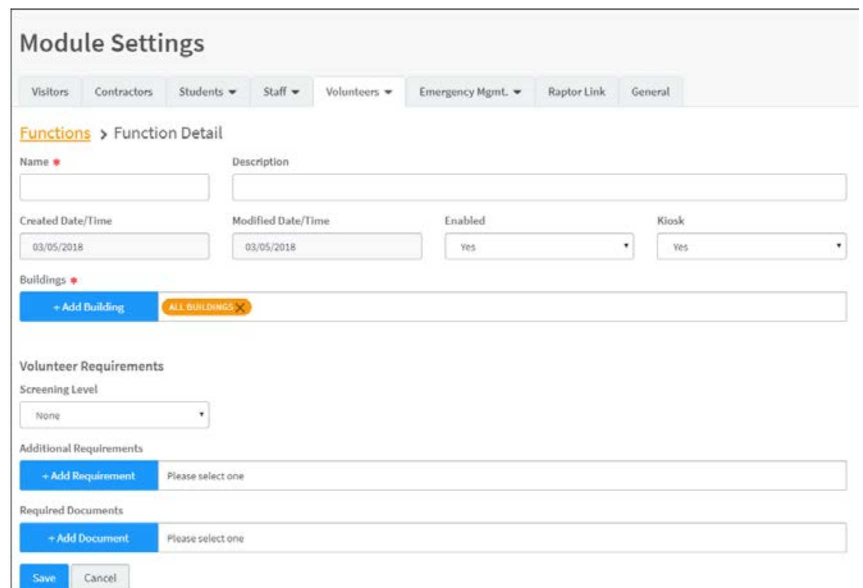
You can add the functions that display during volunteer sign in from the **Functions** grid on the **Volunteer Management Settings** workspace. Functions can only be managed at the client level (All Buildings).


Functions

+ Add Function

| Details | Name | Building Scope | Screening Level | Requirements | Documents | Enabled | Kiosk | Options |
|---|---|---|---|---|---|---|---|---|
| ▶ | Athletics | All Buildings | None | 0 | 0 | Yes | Yes | |
| ▶ | Cafeteria Helper | All Buildings | None | 0 | 0 | Yes | Yes | |
| ▶ | Chaperone | All Buildings | Level 1 | 0 | 0 | Yes | Yes | |
| ▶ | Classroom Helper | All Buildings | None | 0 | 0 | Yes | Yes | |

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Management**.
3. In the **Functions** grid, click **Add Function**.
4. Enter a **Name** and **Description** and specify the following:
   - **Enabled** – Select **Yes** (to enable) or **No** (to disable).
   - **Kiosk** – Select **Yes** (to enable) or **No** (to disable).
5. Click **Add Building** and select the building or building group.
   Click the X to delete building.



# Add Functions

6. Select the **Screening Level** for criminal background screening required for the function.

   **Note:** Criminal background screening is only done on volunteer applications received from the online volunteer application.

7. Click **Add Requirement** and select the requirement(s) associated with the function.

   **Note:** One or more requirements must already be created. See Add Requirements.

8. In the **Required Documents** field, click **Add Document** and select the required document(s) associated with the function.

   **Note:** To use this feature, one or more required documents must already be created. See Add Required Document.

9. Click **Save**.

# Modify Function Details

You can modify and delete functions at the client level (All Buildings).

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Management** from the drop-down menu.
3. In the **Functions** grid, click the ▶ icon to expand the **Function Detail** and modify any of the information.
4. Click **Save**.

**Note:** After the changes have been saved, the **Modified Date/Time** *read-only* field is updated.

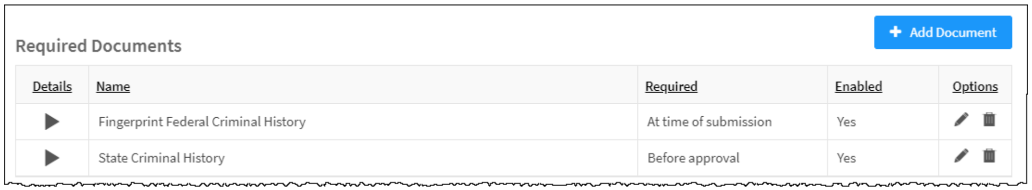
You can also click the ✎ icon in the **Options** column to perform in-line edits and then click the ✔ icon to save your changes.

## Delete Function

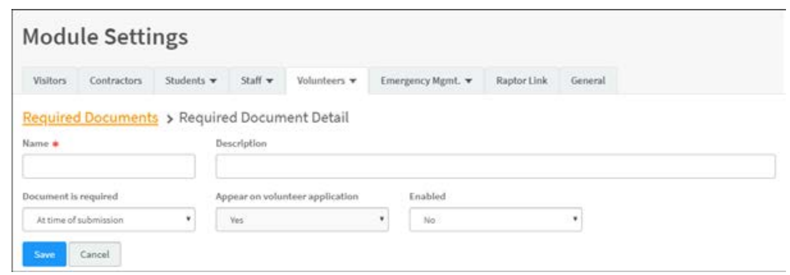
To delete a function, click the 🗑 icon to remove the item from the list of Functions.

# Add Required Document

The **Required Documents** grid on the **Volunteer Management Settings** workspace is used to view and manage required documents that volunteers must provide prior to approval. The required documents can be displayed on the volunteer application and can be associated to functions.




1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Management**.
3. In the **Required Documents** grid, click **Add Document** and specify the following:




   - **Name***
   - **Description** (*Optional*)
   - **Document is required** – Select when the document must be provided (At time of submission or Before approval).

     **Note:** When **Document is required** is set to **At time of submission**, the **Appear on volunteer application** field is set to **Yes** and cannot be changed.
   - **Appear on volunteer application** – Select **Yes** or **No** to indicate whether this required document should be displayed on the volunteer application.
   - **Enabled** – Select **Yes** (to enable) or **No** (to disable) to specify whether the required document is currently enabled or disabled.
4. Click **Save**.

# Modify Required Document

You can edit the required document name, when it is required, and if the required document is enabled or disabled.

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Management**.
3. In the **Required Documents** grid, click the icon in the **Options** column to modify any of the following information:
   - **Name*** – Modify the name of the required document.
   - **Required** – Select when the document must be provided (At time of submission or Before Approval).
   - **Enabled** – Select **Yes** (to enable) or **No** (to disable) to specify whether the required document is currently enabled or disabled.
4. Click the ✔ icon to save your changes. If you want to discard your changes, click the icon.

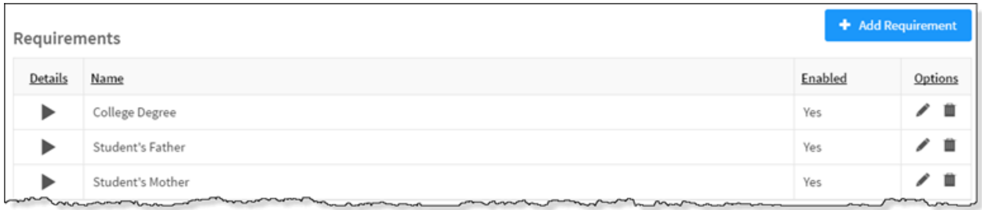
## Delete Required Document

To remove a required document, click the icon in the **Required Documents** grid on the **Volunteer Management Settings** workspace and then click **OK** on the confirmation dialog.

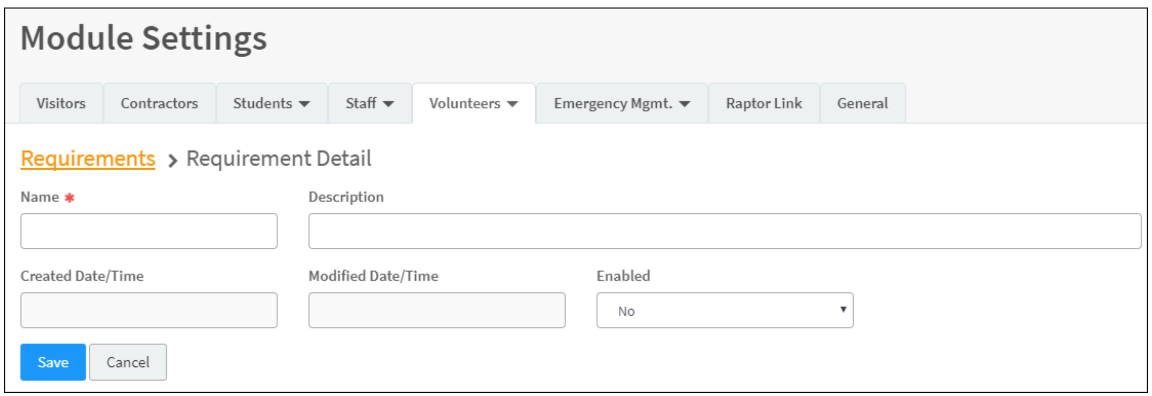
**Note:** A warning message displays if you attempt to delete a required document that is associated with one or more functions.

# Add Requirements

You can view and manage the requirements that can be associated to functions and displayed during the application approval process from the **Requirements** grid on the **Volunteer Management Settings** workspace.




1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Management**.




3. In the **Requirements** grid, click **Add Requirement** and enter a **Name** and **Description**.
4. In the **Enabled** field, select **Yes** (to enable) or **No** (to disable).
5. Click **Save**.

# Modify Requirements

You can modify and delete requirements at the client level (All Buildings).

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Management** from the drop-down menu.
3. In the **Requirements** grid, click the ▶ icon to expand the **Requirement Detail** and modify any of the information.
4. Click **Save**.

**Note:** After the changes have been saved, the **Modified Date/Time** *read-only* field is updated.

You can also click the ✎ icon in the **Options** column to perform in-line edits and then click the ✔ icon to save your changes.

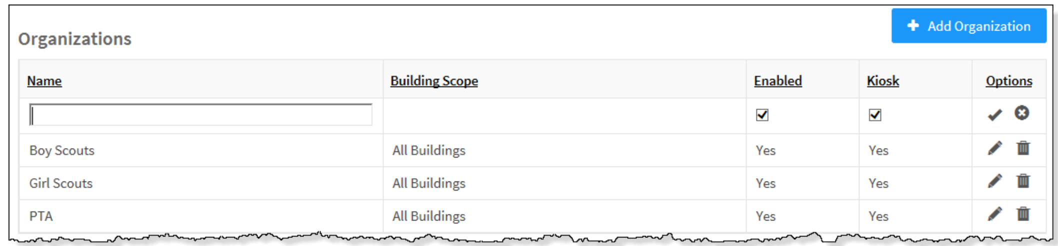
## Delete Requirement

To delete a requirement, click the 🗑 icon to remove the item from the list of Requirements.

**Note:** A warning message displays if you attempt to delete a requirement that is associated with one or more functions.

# Manage Organizations

You can manage the organizations that display during volunteer sign in from the **Organizations** grid on the **Volunteer Management Settings** workspace at the client level (All Buildings). An organization is who the volunteer is representing.




| Name | Building Scope | Enabled | Kiosk | Options |
|---|---|---|---|---|
| | | ☑ | ☑ | |
| Boy Scouts | All Buildings | Yes | Yes | |
| Girl Scouts | All Buildings | Yes | Yes | |
| PTA | All Buildings | Yes | Yes | |

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Management**.
3. In the **Organizations** grid, click **Add Organization**.
4. Enter a **Name** and specify the following:
   - **Enabled** – If you want the organization to display on the **Sign In** workspace, leave the check box selected. Otherwise, clear the check box.
   - **Kiosk** – If you want the organization to display on the Kiosk, leave the check box selected. Otherwise, clear the check box.
4. Click the icon to save the new organization. If you want to discard your changes, click the icon.

## Modify Organization

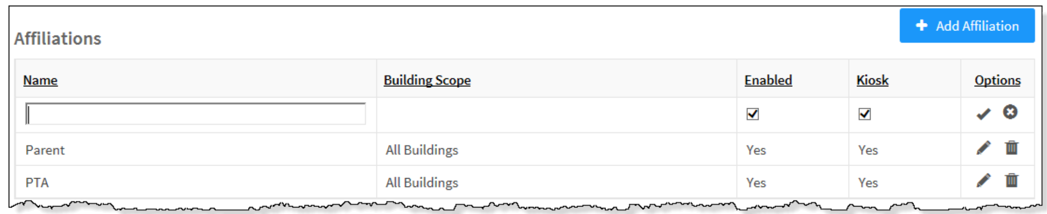
Click the icon in the **Options** column and modify the information. Click to save the organization. If you want to discard your changes, click the icon.

## Delete Organization

Click the icon in the **Options** column and then click **OK** on the confirmation dialog.

# Manage Affiliations

You can manage the affiliations that display during volunteer sign in from the **Affiliations** grid on the **Volunteer Management Settings** workspace at the client level (All Buildings). An affiliation is the relationship to a student who attends the school (for example, mother, father, or uncle).




1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Management**.
3. In the **Affiliations** grid, click **Add Affiliation**.
4. Enter a **Name** and specify the following:
   - **Enabled** – If you want the affiliation to display on the **Sign In** workspace, leave the check box selected. Otherwise, clear the check box.
   - **Kiosk** – If you want the affiliation to display on the Kiosk, leave the check box selected. Otherwise, clear the check box.
4. Click the icon to save the new affiliation. If you want to discard your changes, click the icon.

## Modify Affiliation

Click the icon in the **Options** column and modify the information. Click to save the affiliation. If you want to discard your changes, click the icon.

## Delete Affiliation

Click the icon in the **Options** column and then click **OK** on the confirmation dialog.

# Volunteer Custom Profile Fields

A Custom Profile field is associated with the person being signed in (such as eye color) and displays on the **Volunteer Details** workspace. It may also be configured to display on the **Sign In/Sign Out** workspace.

**Note:** Custom Profile fields are not available in the Kiosk.

## Add Custom Profile Field

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Management** from the drop-down menu.
3. In the **Custom Profile Fields** grid, click **Add Custom Field**.


4. Enter the **Field Name** and **Description**.
5. From the **Field Type** drop-down list, select the type of field (Lookup, Text, Text Area).
6. Select or clear the **Enabled** check box.
7. If this is a required field that must be completed during staff sign in, select the **Required** check box.

# Volunteer Custom Profile Fields, cont.

8. Select the **Display on Sign-In Page** check box if you want the field to display on the **Sign In** workspace.

   **Note:** Custom Profile fields are displayed on the **Sign In** workspace only if the **Display on Sign-In Page** check box is selected. This field displays as *read-only* unless using the manual entry feature.

9. In the **Order** column, specify the order in which the custom profile field displays on the **Volunteer Detail** workspace, the **Personal Information** page of the online volunteer application, and the **Application Detail** workspace. By default the fields appear in the order in which they were created.

   **Note:** You must edit each custom profile field to change the sequence order.

10. Click the ✔ icon to save the newly created custom field. To discard your changes, click the ✖ icon.
11. If the Lookup field type is selected, click **Manage Values** to specify the **Lookup Values** for the field.
12. Click **Add Lookup Value**, enter the **Value** in the text field and click ✔ to save it.

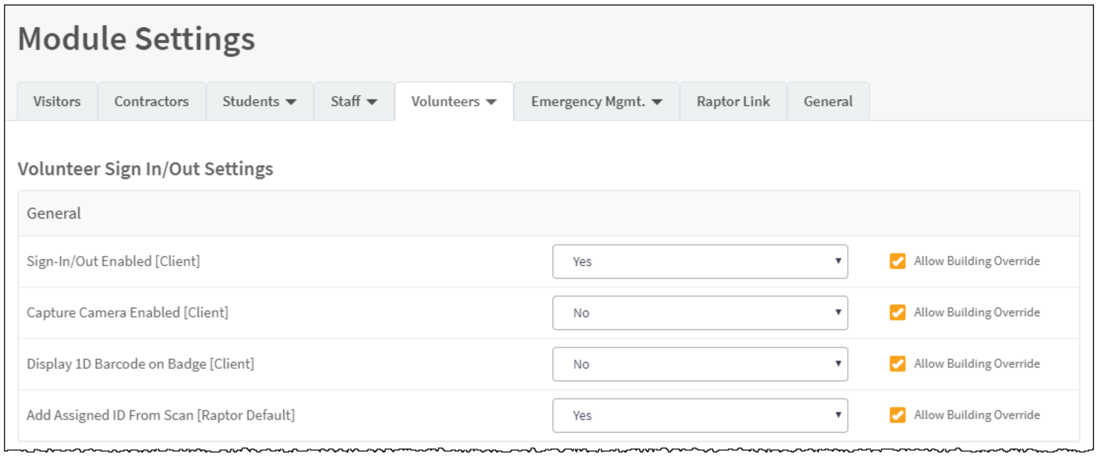
## Modify or Delete Custom Profile Field

To modify a custom profile field, click the ✎ icon in the **Options** column in the **Custom Profile Field** grid on the **Volunteer Management** workspace and edit the information. Click the ✔ icon to save your changes. If you want to discard your changes, click the ✖ icon.

To delete a custom profile field, click the 🗑 icon in the **Custom Profile Field** grid on the **Volunteer Management** workspace and then click **OK** on the confirmation dialog.

# Volunteer Sign-In/Sign-Out Settings

Use the Volunteer Sign-In/Sign-Out Settings workspace to specify sign-in and sign-out settings that display during Volunteer Sign In and Sign Out. To access this workspace, select **Admin > Module Settings** in the navigation menu and then click the **Volunteers** tab and select **Volunteer Sign-In/Out**.




From this workspace, you can perform the following tasks:

- Enable/Disable Volunteer Sign-In/Out
- Enable/Disable Capture Camera
- Display 1D Barcode on Badge
- Specify Volunteer Sign-In Settings
- Add Volunteer Custom Sign-In Fields
- Specify Auto Sign-Out Time

# Enable/Disable Volunteer Sign-In/Out

By default, Raptor is configured with the Volunteer Sign In/Out feature enabled. The feature can be disabled to hide Volunteer Sign In and Sign Out features in the **Sign In/Sign Out** workspace.

Perform the following steps to enable or disable the Volunteer Sign-In and Sign-Out features:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Sign-In/Out** from the drop-down menu.
3. From the **Enable Volunteer Sign In/Out** drop-down list, select **Yes** (to enable) or **No** (to disable).
4. Select the **Allow Building Override** check box if the setting can be overridden at the building level. Otherwise, clear the check box.
5. Click **Save Settings**.
6. Log out of Raptor and then log in to see the change.

# Enable Capture Camera

The capture camera feature allows the user to take a photo of the person signing in and associate that photo with the person's record in the Raptor system. This feature is useful when the person signing in does not have an official ID that can be scanned, such as a passport.

By default, Raptor is configured with the Capture Camera disabled. Users can enable this feature using the **Capture Camera Enabled** setting on the **Volunteer Sign-In/Sign-Out Settings Settings** workspace. When the capture camera is enabled, the Camera button displays on the **Sign In** workspace below the photo.

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Sign In/Out** from the drop-down menu.
3. From the **Capture Camera Enabled** drop-down list, select **Yes** (to enable) or **No** (to disable).
4. Select the **Allow Building Override** check box if the setting can be overridden at the building level. Otherwise, clear the check box.
5. Click **Save Settings**.
6. Log out of Raptor and then log in to see the change.

**Note:** A camera is required to use this feature. If you are using a Windows Internet Explorer (IE) browser, you must have Adobe Flash Player installed to use the Capture Camera feature.

# Add Assigned ID From Scan

Users with the *Can Manage Volunteer Settings* permission can specify whether to allow a 1D barcode to be captured from a volunteer's ID card and populated in the Assigned ID field for that volunteer.

Perform the following steps to enable or disable this feature:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Sign In/Out** from the drop-down menu.
3. In the **Add Assigned ID From Scan** field, select **Yes** (to enable) or **No** (to disable) from the drop-down list.
4. Select the **Allow Building Override** check box if the setting can be overridden at the building level. Otherwise, clear the check box.
5. Click **Save Settings**.
6. Log out of Raptor and then log in to see the change.

# Display 1D Barcode on Badge

Users with Administrative permissions can control whether or not a 1D barcode is printed on the volunteer badge. If the 1D barcode is printed on the badge, the volunteer can simply scan the code on their badge when signing out at the front desk or kiosk.

Perform the following steps to display the 1D barcode on the contractor badge:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Sign In/Out** from the drop-down menu.
3. From the **Display 1D Barcode on Badge** drop-down list, select **Yes** (to enable) or **No** (to disable).
4. Select the **Allow Building Override** check box if the setting can be overridden at the building level. Otherwise, clear the check box.
5. Click **Save Settings**.
6. Log out of Raptor and then log in to see the change.

# Volunteer Sign-In Settings

Use these settings to specify what is required when a volunteer signs in.

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Sign In/Out** from the drop-down menu.
3. Specify whether the following field is required to be completed during sign in and whether individual buildings can override this settings:
   - **Volunteer Can Sign In to Any Building** – Select **Yes** or **No** from the drop-down list to specify whether the Find search returns the volunteers name when they sign into any building in the district; not just those buildings listed on their volunteer application.
   - **Require Sign-In Organization** – Select **Yes** or **No** from the drop-down list to specify whether an organization is required during volunteer sign in.
   - **Allow Building Override** – Select or clear the check box for each of the fields. If selected, the settings can be overridden at the building level. Otherwise, clear the check boxes.
4. Click **Save Settings**.
5. Log out of Raptor and then log in to see the change.

# Volunteer Auto Sign-Out Time

By default, Raptor is configured to automatically sign out all volunteers at 6:00 PM. Users with Administrator permissions can change this time and specify whether the setting can be changed at the building level.

Perform the following steps to modify the auto-sign out time:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Sign In/Out** from the drop-down menu.
3. In the **Auto Sign Out Time** field, click the icon and select the time from the drop-down list.
4. Select the **Allow Building Override** check box if you want buildings to be able to change this time. Otherwise, clear the check box.
5. Click **Save Settings**.
6. Log out of Raptor and then log in to see the change.

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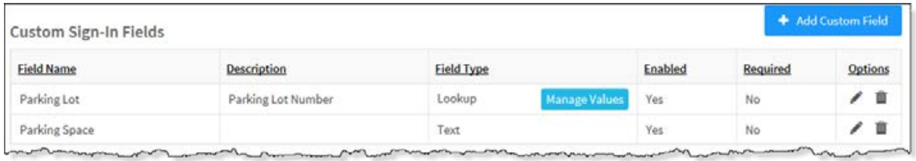
# Volunteer Custom Sign-In Fields

You can create custom sign-in fields that are associated with sign-in events (such as Parking Lot) to display on the **Volunteer Sign In** and **Volunteer Delayed Entry** workspaces for all buildings or specific buildings.

**Note:** Custom Sign-In fields are not available in the Kiosk.

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Sign In/Sign Out**.
3. In the **Custom Sign-In Fields** grid, click **Add Custom Field**.
4. Enter the **Field Name** and **Description**.




5. In the **Field Type**, select the type of field (Lookup, Text, Text Area).
6. Select or clear the **Enabled** check box.
7. If this is a required field that must be completed during volunteer sign in, select the **Required** check box.
8. Click the ✔ icon to save the newly created custom field.
9. If the Lookup field type is selected, click **Manage Values** to specify the **Lookup Values** for the field.
10. Click **Add Lookup Value**, enter the **Value** in the text field and click ✔ to save it.

## Modify Custom Sign-In Field

Click the icon in the **Options** column and edit the information. Click the ✔ icon to save your changes. If you want to discard your changes, click the icon.

## Delete Custom Sign-In Field

Click the icon in the **Options** column and then click **OK** on the confirmation dialog.

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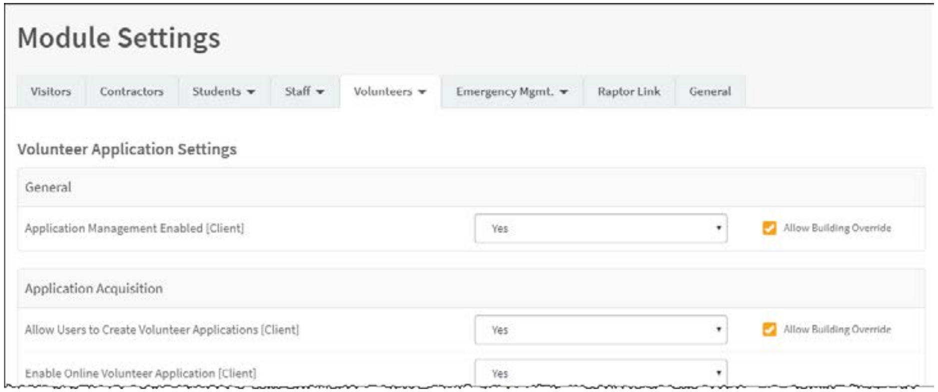
# Volunteer Application Settings

The Volunteer Application Settings workspace includes settings for volunteer applications. To access this workspace, select **Admin > Module Settings** in the navigation menu and then click the **Volunteers** tab and select **Volunteer Application**.

**Note:** This workspace is available with both the Raptor System and Raptor Volunteer Management System, however settings are limited with the Raptor System.

From this workspace, you can perform the following tasks:

- Enable/Disable Application Management
- Specify Application Acquisition Settings
- Specify Approval Queue Settings
- Specify Application Renewal Policy
- Manage Volunteer Notifications
- Manage Online Volunteer Application Page



# Enable/Disable Application Management

By default, Raptor is configured with the **Volunteer Application Management** feature enabled, however, the feature can be disabled to hide these settings.

Perform the following steps to enable or disable the Volunteer Application Management features:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Application** from the drop-down menu.
3. From the **Application Management Enabled** drop-down list, select **Yes** (to enable) or **No** (to disable).
4. Select the **Allow Building Override** check box if the setting can be overridden at the building level. Otherwise, clear the check box.
5. Click **Save Settings**.
6. Log out of Raptor and then log in to see the change.

# Application Acquisition Settings

Users with the *Can Manage Volunteer Settings* permission can specify the settings for how volunteer applications are managed.

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Application**.
3. In the **Application Acquisition** area, specify the settings (see next slide).
4. Click **Save Settings**.
5. Log out of Raptor and then log in to see the change.

# Application Acquisition Settings, cont.

Specify the following settings:

- **Allow Users to Create Volunteer Applications** – Select **Yes** (to enable) or **No** (to disable) to indicate whether users can create volunteer applications in the Volunteer Module.

  Select the **Allow Building Override** check box if the setting can be overridden at the building level. Otherwise, clear the check box.
- **Enable Online Volunteer Application** –Select **Yes** (to enable) or **No** (to disable) to indicate whether the online application is available.
- **Application Return URL** – Enter the URL where the browser will be sent when a volunteer applicant clicks Finish on the last page of the online volunteer application.

  **Note:** URLs ending with a forward slash (/) are not supported.
- **Enable Spanish Localization** – If the Online Volunteer Application feature is enabled, you can also enable the application to display in Spanish. Select **Yes** (to enable) or **No** (to disable).
- **District Email Address** – Enter the email address that will be displayed on the Personal Information page of the online volunteer application to be used if the applicant does not have an email address.
- **Enable Building Groups** – Select **Yes** (to enable) or **No** (to disable) to specify whether building groups display on the online volunteer application. When enabled, the user can select a building group, such as All Elementary Schools, rather than selecting each elementary school where they want to volunteer.

# Specify Approval Queue Settings

Users with the *Can Manage Volunteer Settings* permission can enable or disable the automatic approval of a volunteer application when all requirements are met, such as no matches to possible sex offender alerts, a clean criminal background screening and all custom defined requirements.

You can also enable automated notifications to the Building Volunteer Coordinator when a volunteer has been approved.

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Application** from the drop-down menu.
3. Specify the following information:
   - **Automatically Approve When Requirements Satisfied** – Select **Yes** (to enable) or **No** (to disable) to enable or disable automatic approval of volunteer applications when requirements have been satisfied.
   - **Notify Building Volunteer Coordinator On Approval** – Select **Yes** (to enable) or **No** (to disable) to enable or disable automatic notifications to the Building Volunteer Coordinator associated with the same buildings selected on the application, when volunteer applications have been approved.

     **Note:** This feature requires the Application Approved - Internal Notification to be enabled.

     **Allow Building Override** – Select the check box if the setting can be overridden at the building level. Otherwise, clear the check box.
   - **Texas DPS User ID** – Enter the Texas DPS user ID to be referenced when creating a new batch of volunteer applications that are formatted specifically for Texas DPS.
4. Click **Save Settings**.
5. Log out of Raptor and then log in to see the change.

# Specify Application Renewal Policy

Users with the *Can Manage Volunteer Settings* permission can select the number of days prior to the volunteer's expiration date at which time the volunteer can submit a new application. The renewal options are in 30-day increments.

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Application** from the drop-down menu.
3. From the **Allow Application Renewal Prior to Expiration** drop-down list, select the number of days prior to expiration that the volunteer can resubmit a volunteer application (30 Days is the default).

   To disable this feature, select **Never** from the drop-down list.
4. Select the **Allow Building Override** check box if the setting can be overridden at the building level. Otherwise, clear the check box.
5. Click **Save Settings**.
6. Log out of Raptor and then log in to see the change.

# Manage Volunteer Notifications

Use the **Notification Management** grid on the **Volunteer Application Settings** workspace to enable and disable the notifications that are automatically sent to volunteer applicants and to people who are specified in contacts during the application process.

Notification Management

| Details | Name | Recipient | Building Scope | Is Enabled |
|---|---|---|---|---|
| ▶ | Application Received | Applicant | All Buildings | Yes |
| ▶ | Application Approved | Applicant | All Buildings | Yes |
| ▶ | Application Renewal Notice | Volunteer | All Buildings | No |
| ▶ | Application Approved - Internal Notification | Client Contacts | All Buildings | Yes |
| ▶ | Volunteer Application Disclaimer | Client Contacts | All Buildings | Yes |
| ▶ | Application Requires Attention | Client Contacts | All Buildings | Yes |
| ▶ | Application Denied | Client Contacts | All Buildings | Yes |

- **Application Received** – Sent only to volunteer applicants upon receipt of application.
- **Application Approved** – Sent only to volunteer applicants upon approval of application.
- **Application Renewal Notice** –Sent to active volunteers when their application renewal window begins as defined by the volunteer application renewal policy.
- **Application Approved - Internal Notification** – Sent to volunteer coordinator contact(s) when application has been approved.
- **Volunteer Application Disclaimer** – Sent to the volunteer coordinator contacts when applicant has read and accepted the disclaimer on the volunteer application.
- **Application Requires Attention** – Sent to volunteer coordinator contact(s) when application needs attention.

# Manage Volunteer Notifications, cont.

- **Application Denied** – Sent to volunteer coordinator contact(s) when application has been denied.
- **Criminal Background Screening Maintenance** – Sent to volunteer coordinator contact(s) to notify volunteer application service is entering maintenance mode (only customers with criminal background screening feature enabled).
- **Criminal Background Screening Funds Low Depleted or Replenished** – Sent to the specified client contact when criminal background screening low funds threshold has been met, or fund is depleted or replenished.
- **Volunteer Portal User Account Creation Failed** – Sent to volunteer coordinator contact(s) when volunteer portal user account fails to be created because the email address is already used by another user account.

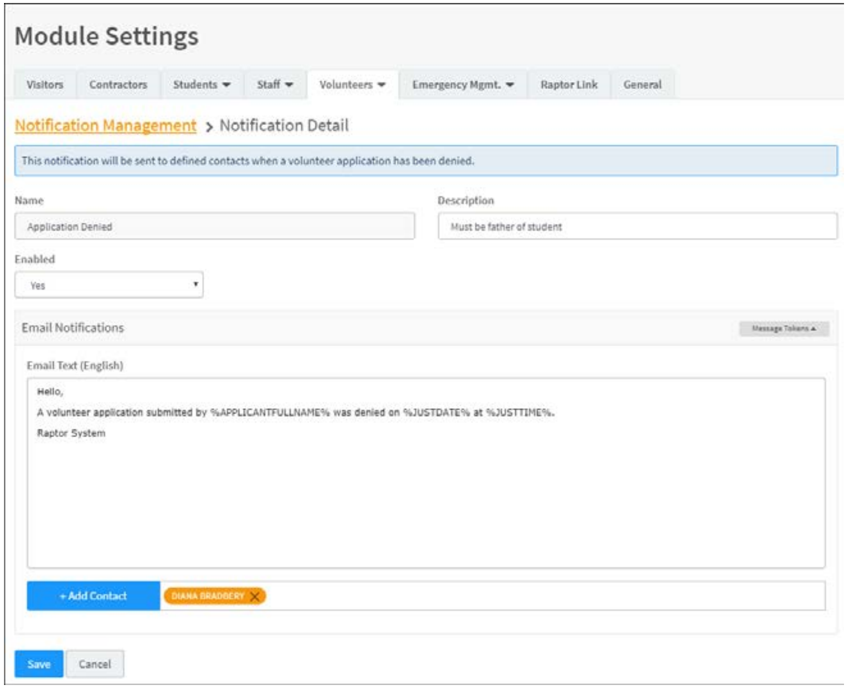
# Volunteer Notifications, cont.

**Note:** Contacts must be defined prior to using this feature where the applicant is the recipient of the notification.

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Application**.
3. In the **Notification Management** grid, click the ▶ icon in the Details column and specify the following:
   - **Enabled** – Select **Yes** (enable) or **No** (disable).
   - **Description** – Optional description.
   - **Email Text** – Message that will be sent via email. You can also use Message Tokens to compile the message.
   - **Email Contacts** – Click **Add Contact** and select the contact name.

     To remove an email contact, click the **X** in the contact label.

     **Note:** If the contact name is gray, it was defined at the district level and cannot be removed at the building level.
4. Click **Save Settings**.
5. Log out of Raptor and then log in to see the change.




**Note:** In the **Add Contact** drop-down list, the icons that display represent the contact's preferred method of notification. If the contact has selected both Text and Email as their preferred notification method, when one method is populated with the contact name, the other method will be automatically populated.

RAPTOR TECHNOLOGIES

# Message Tokens for Volunteer Notifications

You can also use Message Tokens, which are variables, in the notification message so that when the message is sent, the tokens will be replaced by their associated value.

Click **Message Tokens** to view the variables that can be entered in the message.

**%APPLICATIONID%** - Unique Application ID Number
**%CLIENTNAME%** - District Name
**%BUILDINGNAME%** - Building Name
**%JUSTDATE%** - Date Logged - MM/DD/YYYY

**Example:**

Congratulations. Your application has been approved and you are now able to volunteer at %CLIENTNAME%.

# View Online Application URLs

Use the **Online Volunteer Application Page Management** area on the **Volunteer Application Settings** workspace to manage the online volunteer application page that can be accessed from your district website.

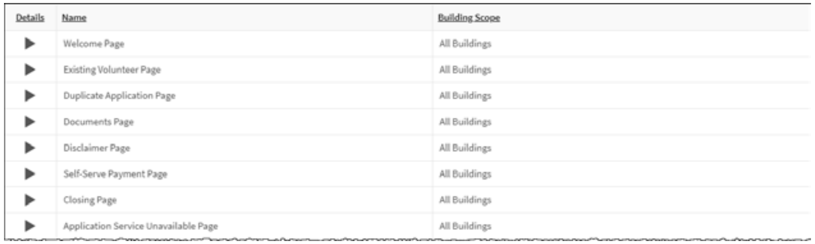
If the **Online Volunteer Application** feature is enabled, the URLs to access the online volunteer application are generated in the **Online Volunteer Application Page Management** area in the lower portion of the **Volunteer Application Settings** workspace. You can use these URLs to display on your client website.


1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Application** from the drop-down menu.
3. In the **Online Volunteer Application Page Management** area on the **Volunteer Application Settings** workspace, view the URLs in the appropriate fields:
   - **English Language URL** –If Online Volunteer Application is enabled, the URL to access the English language online volunteer application displays in this field.
   - **Spanish Language URL** – If Spanish Localization is enabled, the URL to access the Spanish language online volunteer application displays in this field.

**Note:** If the Online Volunteer Application feature is disabled, these fields will be disabled. You must enable the feature to enable the URL fields.

# Online Application Content

Users with the *Can Manage Volunteer Settings* permission can specify the text that displays on the following pages of the online volunteer application.



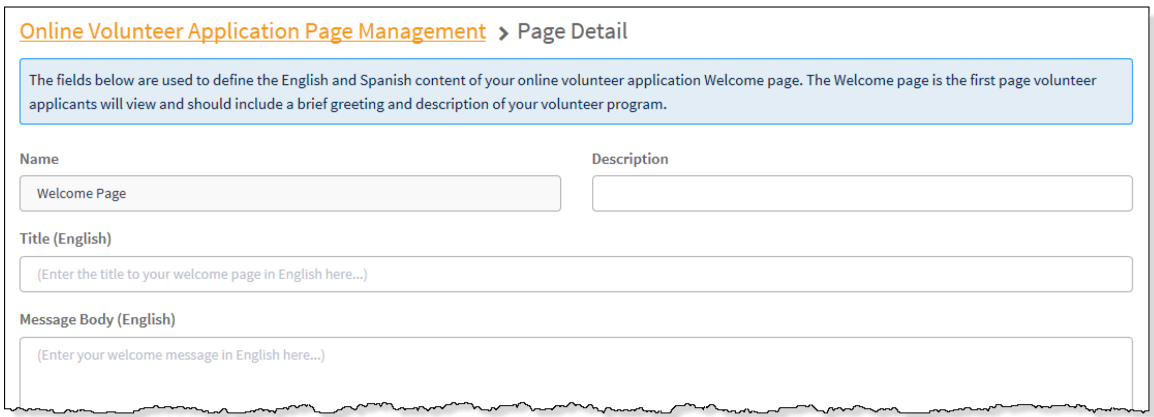
| Details | Name | Building Scope |
|---|---|---|
| ▶ | Welcome Page | All Buildings |
| ▶ | Existing Volunteer Page | All Buildings |
| ▶ | Duplicate Application Page | All Buildings |
| ▶ | Documents Page | All Buildings |
| ▶ | Disclaimer Page | All Buildings |
| ▶ | Self-Serve Payment Page | All Buildings |
| ▶ | Closing Page | All Buildings |
| ▶ | Application Service Unavailable Page | All Buildings |

- **Welcome Page** – First page that displays in the online volunteer application.
- **Existing Volunteer Page** – Displays for a volunteer who has already been approved and is resubmitting an online volunteer application but it is not within their renewal window.
- **Duplicate Applications Page** – Displays when a person is attempting to submit an application using the online volunteer application however that person already has an application under review.
- **Documents Page** – This page displays the required documents that applicants must provide either at time of submission or before approval.
- **Disclaimer Page** – This page displays before the application Self-Serve Payment page or the Closing page, and provides a disclaimer and signature field for the applicant.
- **Self-Serve Payment Page** – This page displays if you have selected one or more functions that require a background check that has an associated cost that will be paid by the applicant; allows applicant to provide payment information.
- **Closing Page** – Last page of the online volunteer application.
- **Application Service Unavailable Page** – Displays when the online volunteer application is down due to maintenance.

# Online Application Content, cont.

Perform the following steps to specify the content that displays on the online volunteer application:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Application** from the drop-down menu.
3. In the **Online Volunteer Application Page Management** area on the workspace, click the ▶ icon in the **Details** column for the [page name].




4. On the **Page Detail** workspace, specify the **Title** (for English and Spanish) and the **Message Body** (English and Spanish).

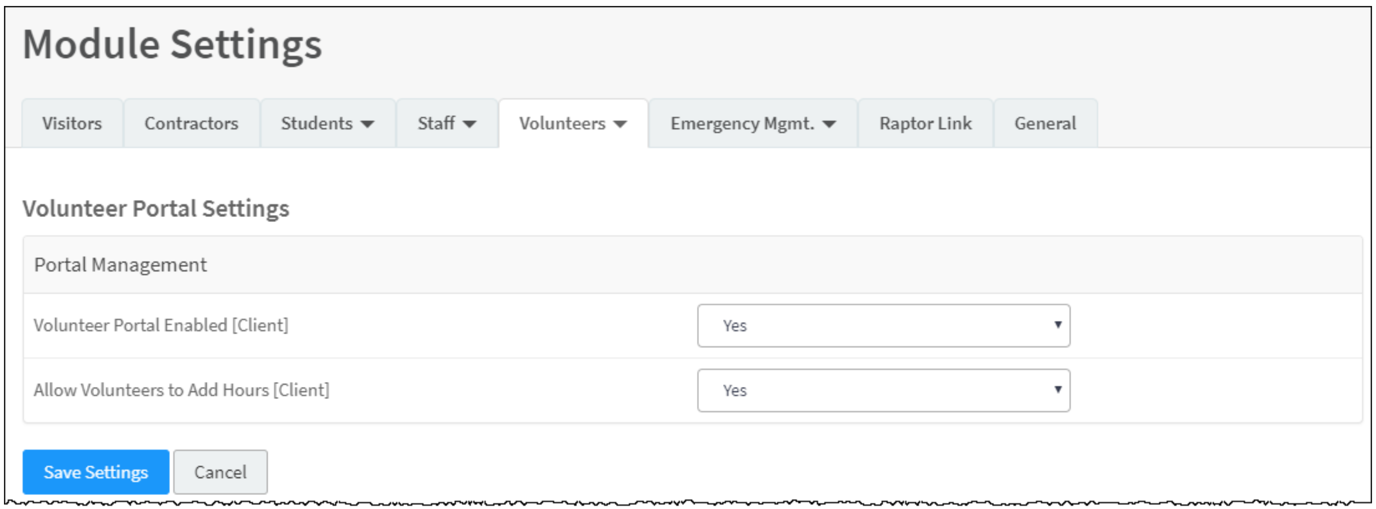
   **Note:** If the Spanish language online application is disabled, you must enable it before the fields will be enabled.

5. Click **Save**.

# Volunteer Portal Settings

The **Volunteer Portal Settings** workspace enables users with the *Can Manage Volunteer Settings* permission to manage the volunteer portal. To access this workspace, select **Admin > Module Settings** in the navigation menu and then click the **Volunteers** tab and select **Volunteer Portal**.

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




From this workspace, you can perform the following tasks:

- Specify Portal Management Settings
- Manage Volunteer Portal Notifications
- Access Volunteer Portal URL

# Specify Portal Management Settings

Use this area on the **Volunteer Portal Settings** workspace to enable or disable the volunteer portal, and to specify whether volunteers can add hours.

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Portal** from the drop-down menu.
3. Specify the following settings:
   - **Volunteer Portal Enabled** -- Select **Yes** (to enable) or **No** (to disable). By default, the volunteer portal is disabled.
   - **Allow Volunteers to Add Hours** – Select **Yes** (to allow) or **No** (to not allow).

     **Note:** This setting displays only when the **Enable/Disable Volunteer Portal** setting is enabled.
4. Click **Save Settings**.
5. Log out of Raptor and then log in to see the change.

# Volunteer Coordinator Notifications

Use the **Notification Management** grid on the **Volunteer Portal Settings** workspace to enable and disable the email notification that is sent to the Volunteer Coordinator when a volunteer selects the **Contact Volunteer Coordinator** option in the Volunteer Portal, and to specify the contacts who receive the email notification.

**Note:** This grid only displays when the Enable/Disable Volunteer Portal setting is enabled.

Notification Management

| Details | Name | Recipient | Building Scope | Is Enabled |
|---|---|---|---|---|
| ▶ | Email Volunteer Coordinator | Client Contacts | All Buildings | No |

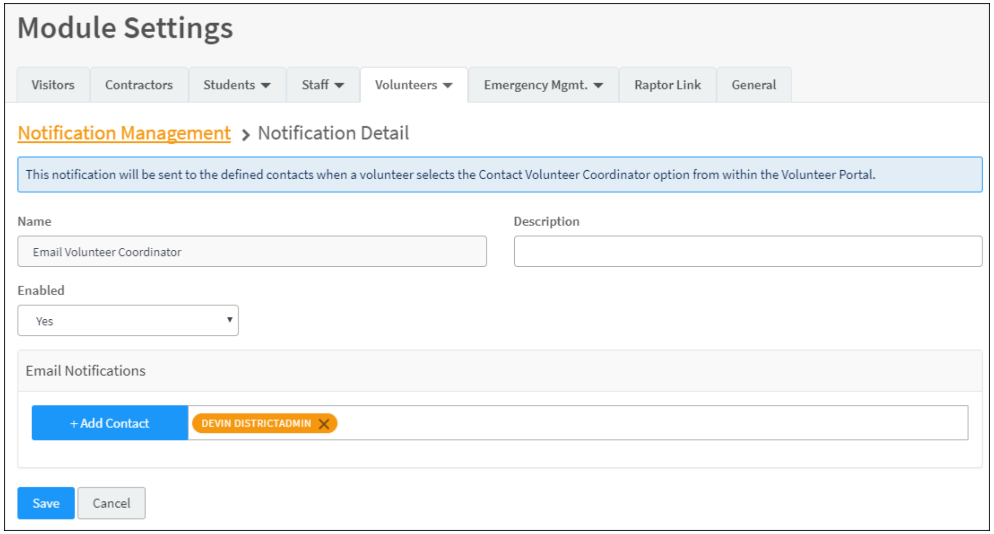
**Note:** Contacts must be defined prior to using this feature.

Perform the following steps to set up automatic notifications:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Portal** from the drop-down menu.
3. In the **Notification Management** grid, click the ▶ icon in the **Details** column.

# Volunteer Coordinator Notifications, cont.

4. On the **Notification Detail** workspace, specify the following information:




- **Enabled** – Select **Yes** (enable) or **No** (disable) to indicate whether the notification should be enabled.
- **Email Notifications** – Click **Add Contact** and select the contact name from the drop-down list. The contact information must be added in Contacts prior to creating the email notification.

  To remove an email contact, click the **X** in the contact label.

  **Note:** If the contact name is gray, it was defined at the district level and cannot be removed at the building level.

5. Click **Save**.

# Access Volunteer Portal URL

This feature generates a client-specific URL to access the Volunteer Portal. This URL will also be provided in the Volunteer Approval notification to applicants when the Volunteer Portal is enabled and the applicant has provided a valid email address.

**Note:** If the Volunteer Portal is disabled, this field will be blank.

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Portal** from the drop-down menu.
3. In the **Volunteer Portal Access** list on the workspace, view the URL in the **Volunteer Portal URL** field.


4. Copy the URL into your browser to access the volunteer portal for your district. You can also include this URL on your district website for volunteers to access the volunteer portal.

# Volunteer Event Management Settings

The **Volunteer Event Settings** workspace enables users with the *Can Manage Volunteer Settings* permission to manage the volunteer event settings in Raptor.

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


From this workspace, you can:

- Enable and Disable Volunteer Event Management

# Enable/Disable Event Management

You use the **Volunteer Event Settings** workspace to enable or disable Event Management.

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

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteer**s tab and select **Volunteer Portal** from the drop-down menu.
3. From the **Volunteer Event Management Enabled** drop-down list, select **Yes** (to enable) or **No** (to disable).
4. Select the **Allow Building Override** check box if the setting can be overridden at the building level. Otherwise, clear the check box.
5. Click **Save Settings**.
6. Log out of Raptor and then log in to see the change.

# Managing Volunteers

The **Volunteer** workspace is used to manage the volunteers who enter your building and the volunteer application process. This section includes the following topics:

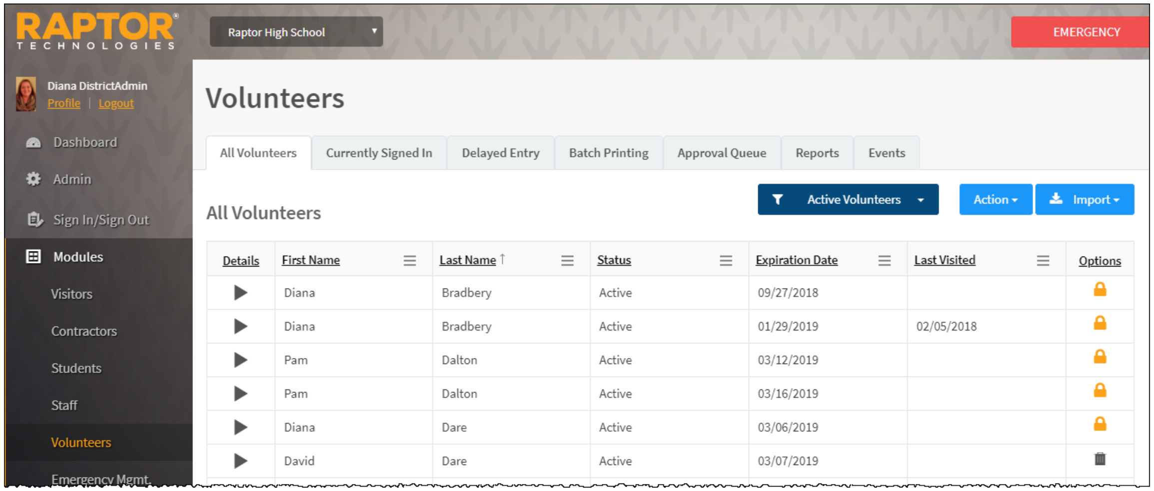
# Volunteer Dashboard

The Volunteer Dashboard displays on the home screen upon user sign in. It provides a graphical view of up-to-date information on volunteer activity. Users with the *Can Run Volunteer Reports* permission can view the Volunteer Dashboard.

- **Active Volunteers** – Displays the number of volunteers currently signed in, total hours for the week, and total hours for the month.
- **Volunteer Applications** – Displays the number of new or renewed volunteer applications that have been submitted for the current week, the number of applications pending approval, and the number of applications that have been approved for the current week.

# Volunteers 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.

# View Application History/Hours Logged

## Application History

At the client level (All Buildings), the **Application History** grid 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.

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

Application History

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

1 | 10 items per page | 1 - 1 of 1 items

## Hours Logged

The **Hours Logged** grid 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. It also includes the sign-in events and hours logged by the volunteer in the Volunteer Portal.

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.

**Note:** A sign-out date/time must be present to edit an entry.

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 | |

1 | 10 items per page | 1 - 3 of 3 items

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

# View Sign-In/Out History

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

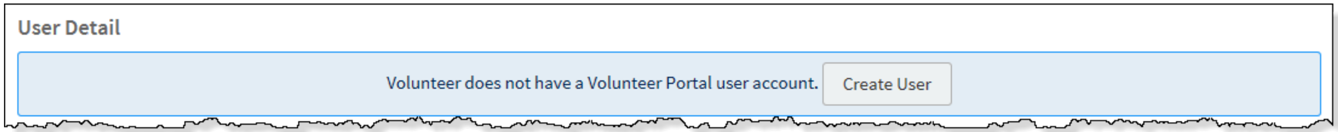
By default, the Date/Time, Event Type, Building Name and Destination columns display. From the column menu, you can also choose to display the Event Method column.

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

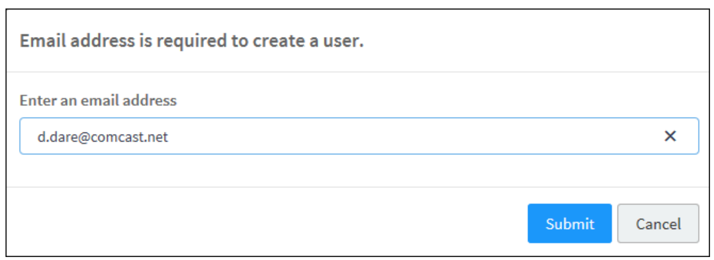
If the Volunteer Portal is enabled and the volunteer does not have a volunteer portal user account set up, the **User Detail** area on the **Volunteer Detail** workspace displays a message bar.




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.

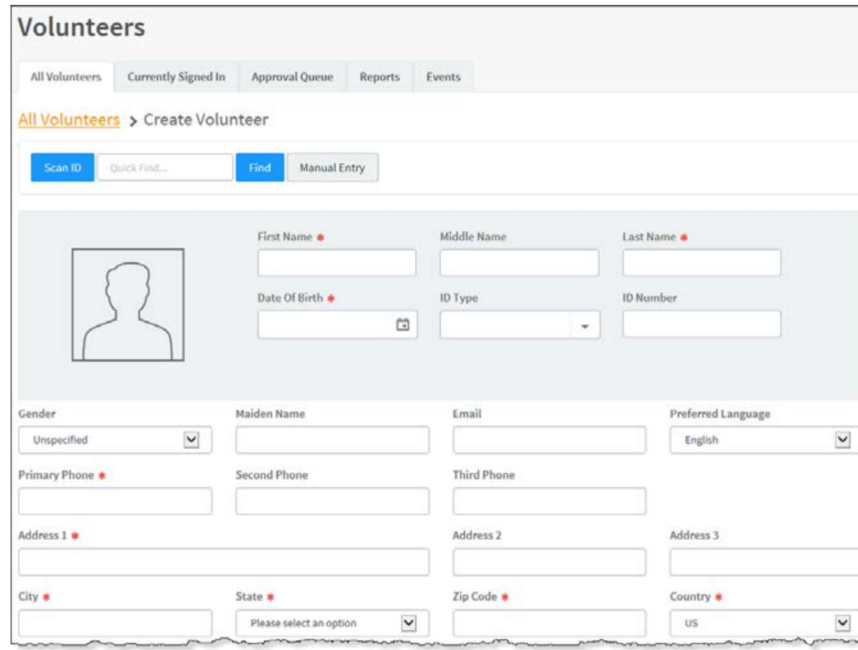
# Create Volunteer Application

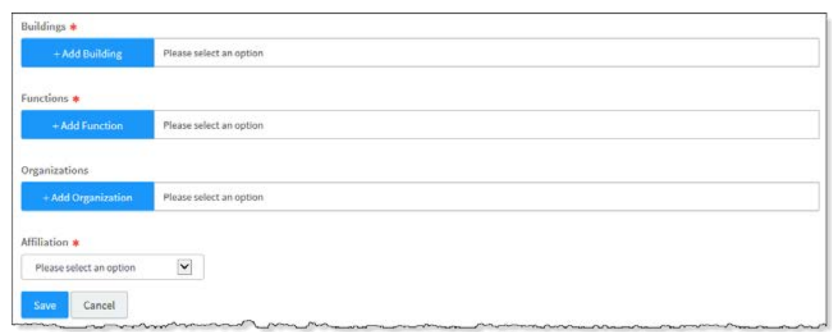
A volunteer application must be completed and approved before the applicant can participate as a volunteer. The operator assisted application is available from the **All Volunteers** tab.

1. From the navigation menu, select **Modules > Volunteers**.
2. On the **All Volunteers** tab, click **Action > Create Volunteer**.
3. Add the volunteer's information using 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*** to which the volunteer is associated, the **Functions*** the person is volunteering for, the **Organizations** they are associated with, and their **Affiliations***.

   **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.



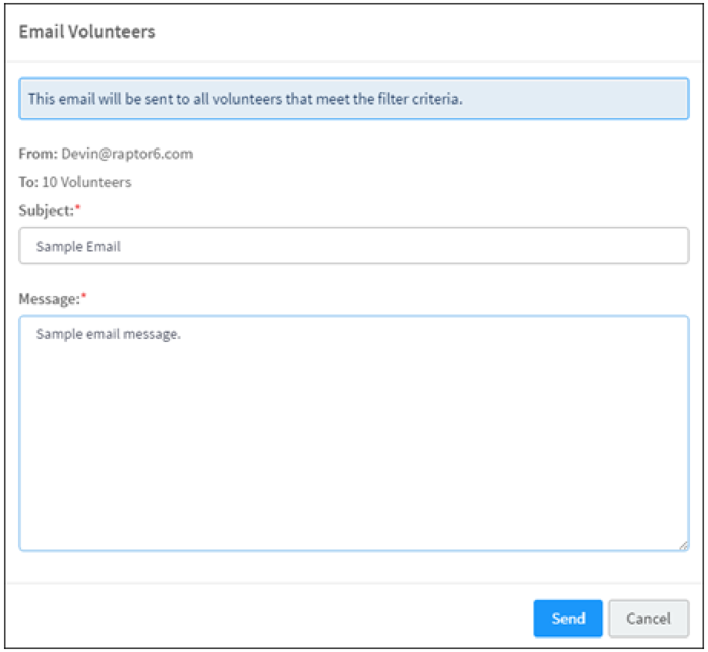



# Email All Volunteers

Volunteer Coordinators can send an email to all or a portion of the volunteers from the **All Volunteers** workspace.

1. From the navigation menu, select **Modules > Volunteers**.
2. On the **All Volunteers** workspace, filter to display the volunteers you want to email. For example, select **All Buildings** and **Active Volunteers**.
3. Click **Action > Email All**.

   A dialog box displays confirming the volunteers based on the selected filters.
4. Click **Proceed** on the confirmation dialog or click **Filter List Further** to return to the **All Volunteers** grid to change your filtered list.
5. Enter the email **Subject** and **Message**, and then click **Send**.



# Show/Hide Functions

Volunteer Coordinators can filter the **All Volunteers** data grid to show those volunteers who are approved for a function. This filtered list can then be used to email those volunteers for events that require those functions.

1. From the navigation menu, select **Modules > Volunteers**.
2. On the **All Volunteers** workspace, click **Action** and select **Show/Hide Functions** to display the **Functions** column along with each function that the volunteers have been approved to participate.
3. Click the column **Filter** option to show only those volunteers who have the specific function associated with their profile.

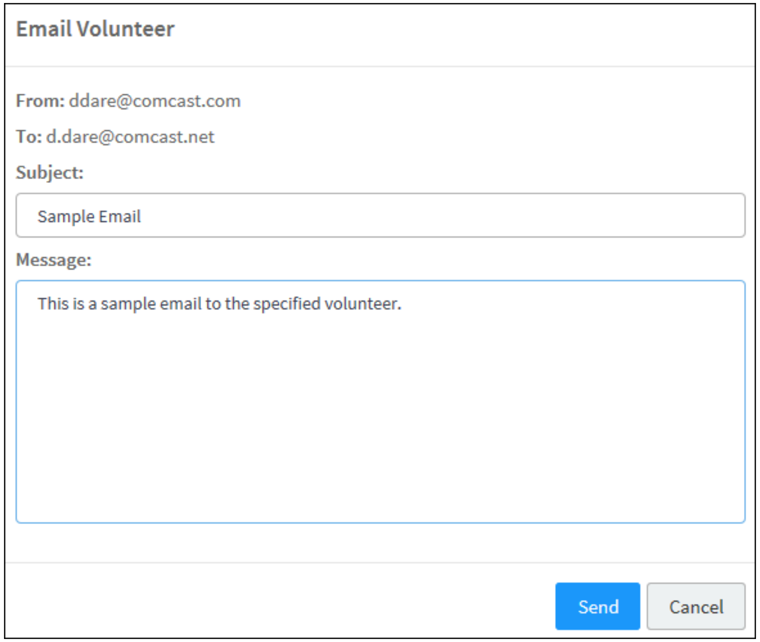
   The volunteers that meet this filtered function criteria display in the **All Volunteers** grid. You can now email these volunteers for a specific event that requires this function.

# Email Volunteer—Detail Workspace

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 resets the count to zero. This 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

On 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. See View Hours Logged.

When you click **Reset Hours**, a confirmation message displays for you to **Submit** or **Cancel** the action.

**Note:** Resetting volunteer hours at any level 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.

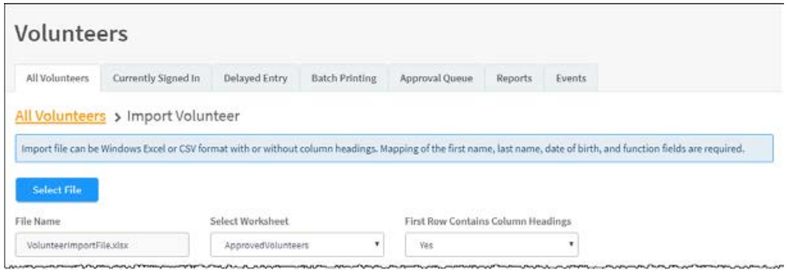
# Import Approved Volunteers

Administrators with the *Can Import Volunteers* permission can use the Import Volunteers utility 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.

**Notes:**

- When you import volunteers, the volunteers do not go through the approval process.
- A Volunteer Portal account will not be automatically created for the imported volunteers.
- 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.
- When import is used to update existing records, fields that are not imported will not be overwritten.

1. In the navigation menu, select **Modules > Volunteers**, and then click **Import > Approved Volunteers**.
2. Click **Select File**, navigate to the 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 **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*
- Assigned ID
- Gender
- Address/City/State/Zip Code
- Primary Phone
- Email Address
- Functions*
- Affiliation
- Organizations
- Expiration Date
- Preferred Language
- Buildings

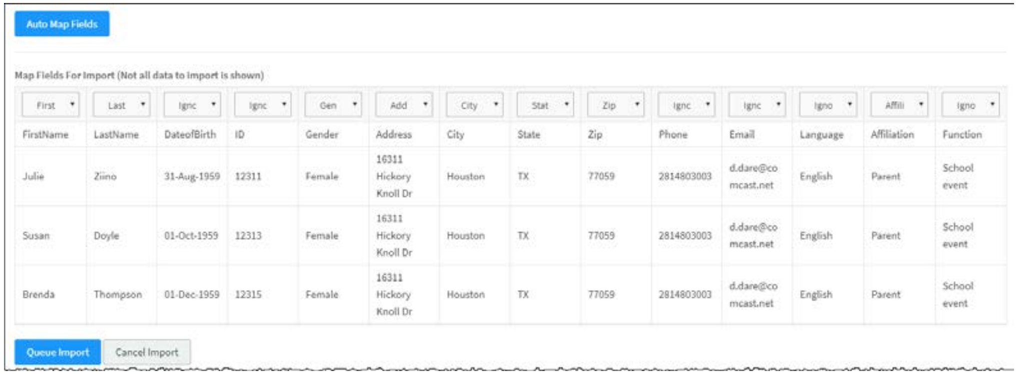
*Indicates required information.

**Note:** To import multiple Functions, Buildings and/or Organizations, enter all items into the appropriate Excel cell of your import file, separating each function, building 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. Click **Auto Map Fields** to automatically map the column headings in the file to the mapping names in Raptor. The names must be identical. You can also manually map each of the columns to be imported by selecting the appropriate fields in the drop-down menu above each column that displays.

   First Name, Last Name, Date of Birth and Function are required columns. The columns with **Ignore** selected with not be imported.




| First | Last | Ignc | Ignc | Gen | Add | City | Stat | Zip | Ignc | Ignc | Igno | Affili | Igno |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| FirstName | LastName | DateofBirth | ID | Gender | Address | City | State | Zip | Phone | Email | Language | Affiliation | Function |
| Julie | Ziino | 31-Aug-1959 | 12311 | Female | 16311 Hickory Knoll Dr | Houston | TX | 77059 | 2814803003 | d.dare@comcast.net | English | Parent | School event |
| Susan | Doyle | 01-Oct-1959 | 12313 | Female | 16311 Hickory Knoll Dr | Houston | TX | 77059 | 2814803003 | d.dare@comcast.net | English | Parent | School event |
| Brenda | Thompson | 01-Dec-1959 | 12315 | Female | 16311 Hickory Knoll Dr | Houston | TX | 77059 | 2814803003 | d.dare@comcast.net | English | Parent | School event |



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 approve or deny the application. If approved, the volunteer record is created in the system.

**Notes:**

- You can import volunteer applications for a specific building or All Buildings.
- 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.
- When import is used to update existing records, fields that are not imported will not be overwritten.

1. From the navigation menu, select **Modules > Volunteers**, and then click **Import > Applications**.
2. Click **Select File**, navigate to the 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**.

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

- First Name*
- Last Name*
- Middle Name
- Date of Birth*
- Gender
- Address/City/State/Zip Code
- Primary Phone
- Email
- Functions*
- Affiliation
- Organizations
- Buildings

*Indicates required information.

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

# Import Volunteer Applications, cont.

5. Click **Auto Map Fields** to automatically map the column headings in the file to the mapping names in Raptor. The names must be identical. You can also manually map each of the columns to be imported by selecting the appropriate fields in the drop-down menu above each column that displays.

   First Name, Last Name, Date of Birth, and Function 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 volunteer applications go to the approval queue for the volunteer coordinator to approve or deny the application. If enabled, a Volunteer Portal user account will automatically be created when the application is approved.

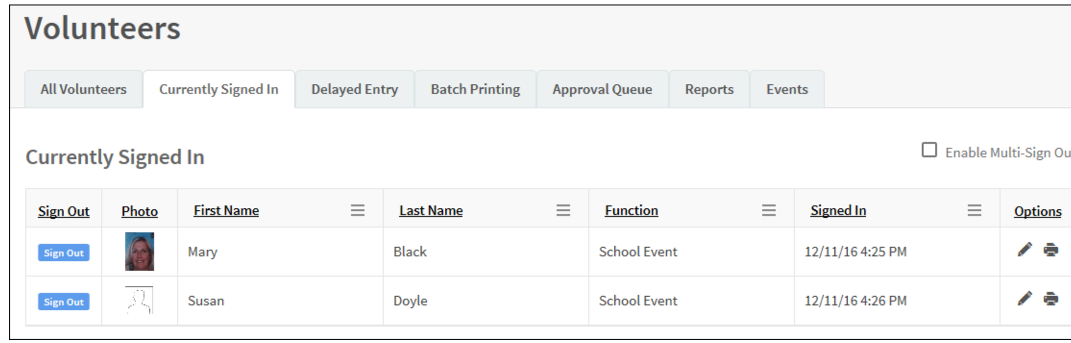
# Currently Signed In Volunteers

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

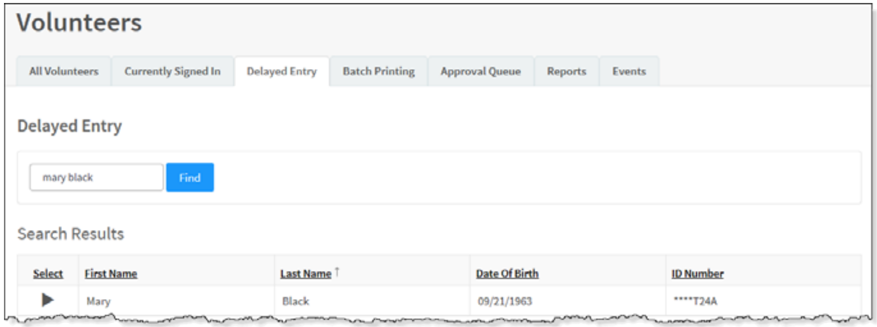
You can sign out a single volunteer or multiple volunteers:

- 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 volunteers due to equipment issues or internet connection issues, you can use the Delayed Entry feature to manually enter the sign-in and 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. *This feature is not visible at the All Building level.*




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 **Delayed Entry** tab.
3. Enter the **First Name** or **Last Name** and click.
4. Select the person from the search results and complete the following information:
   - **Sign-In Date/Time*** – Select the date and time that the person actually signed in.
   - **Sign-Out Date/Time** – Select the date and time that the person actually signed out.

     **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.
   - **Organization** – Select the organization associated with the volunteer.
5. Click **Submit**. A *Delayed Entry Successful* message displays in the lower right corner of the screen.

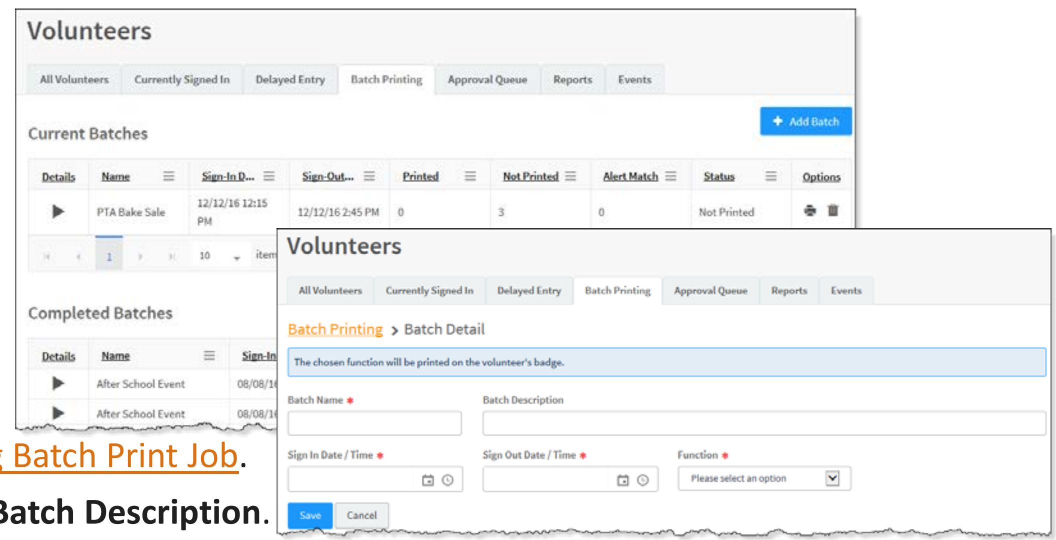
# Batch Printing

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.

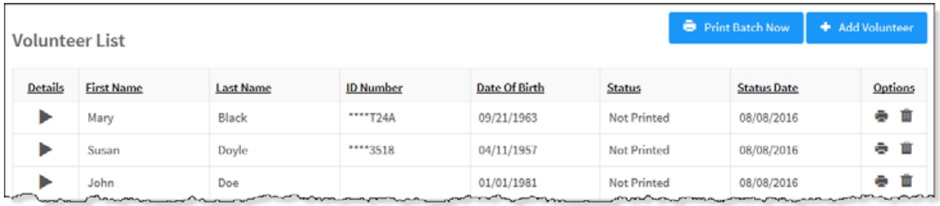
## Add Batch Print Job




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.
3. Click **Add Batch**. You can also copy a **Completed Batch** job and modify it to create a new batch job. See Cloning Batch Print Job.
4. Enter the **Batch Name*** and optional **Batch Description**.
5. Select the **Sign-In Date/Time*** and **Sign-Out Date/Time***. *The **Sign-In Date** and **Sign-Out Date** must be the same date.*
6. Select the **Function*** and click **Save**.

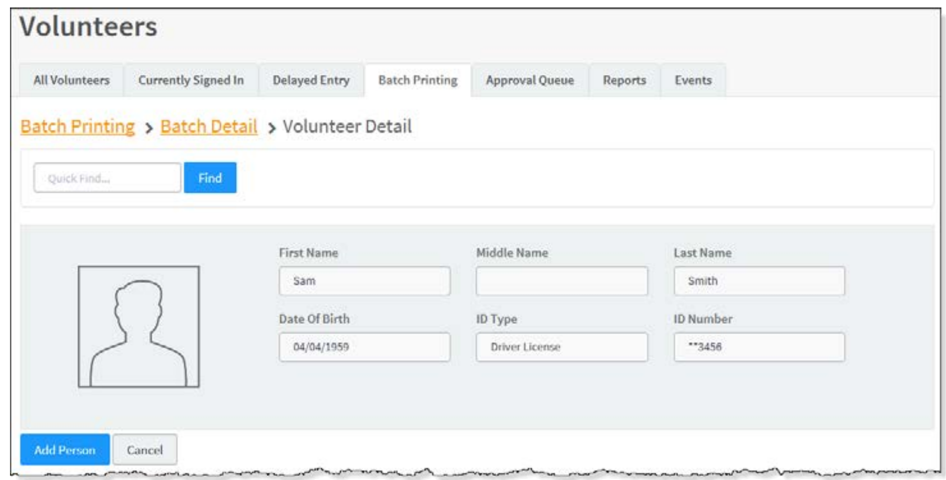
# Batch Printing, cont.

8. In the **Volunteer List** area, click **Add Volunteer**.




**Note:** You can only add volunteers to the batch if they have previously signed in and have an official record in the Raptor system.

9. Enter the volunteer's name and click **Find**.
10. In the search results, click **Select** next to the volunteer's name.
11. On the **Volunteer Detail** workspace, click **Add Person**.
12. Repeat Step 8 and Step 11 for all volunteers to be added to the batch.



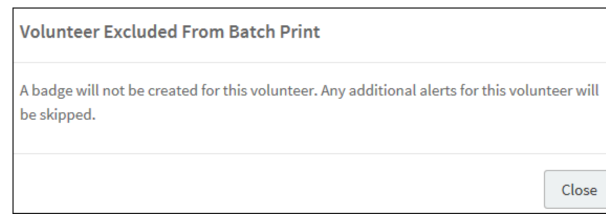
# Execute Batch Printing

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** grid on the **Batch Printing** workspace, click the icon in the **Options** column.
   - From the **Volunteers List** grid on the **Batch Print Details** workspace, click **Print Batch Now**.
2. On the **Print Confirmation** dialog, click **Continue**.

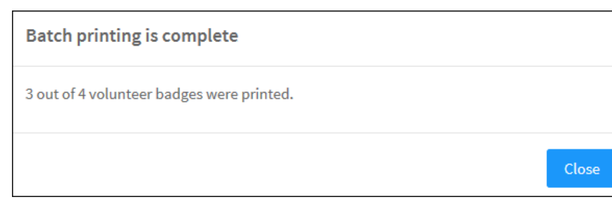

3. If a Possible Offender alert displays for any volunteer, review the information and determine if it is a match. See Possible Offender and Custom Alerts.

   If the volunteer is a match to an offender or custom alert, the badge will not be printed and the **Volunteer Excluded From Batch Print** dialog displays.




4. Click **Close** to continue.

   When all the badges have printed, the number of printed badges printed displays on the **Batch printing is complete** dialog.




5. Click **Close** to complete the procedure.

Volunteers will automatically be signed in and signed out on the date and time specified in the Batch Print job.

**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** grid, 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 |

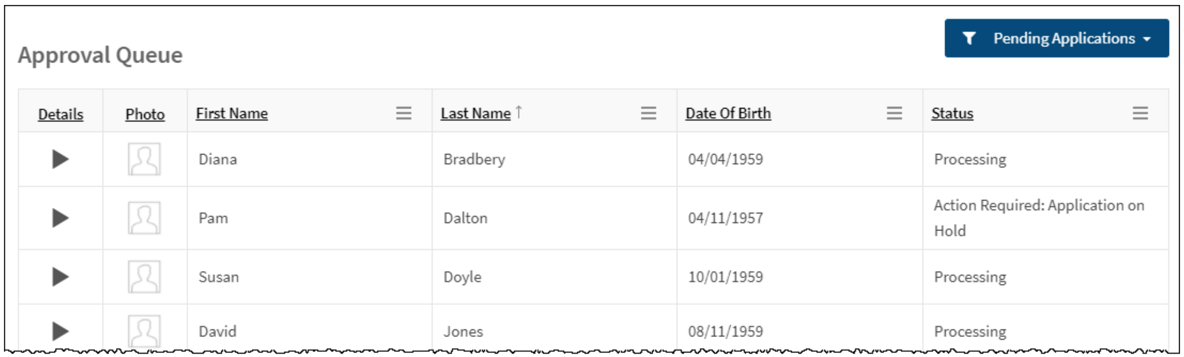
4. On the **Batch Detail** workspace, enter the **Batch Name*** and optional **Batch Description**.
5. Select the **Sign-In Date/Time*** and **Sign-Out Date/Time***. *The **Sign-In Date** and **Sign-Out Date** must be the same date.*
6. Select the **Function*** and click **Save**.

RAPTOR TECHNOLOGIES

# Approval Queue

Volunteer Coordinators use the **Approval Queue** to manually process applications. They can manually deny a volunteer application from the Approval Queue at any time. However, all required tasks must be completed before an application can be approved. You must have the *Can Approve Volunteers* permission to see this tab.

The Approval Queue grid includes a quick filter that provides access to pending applications, approved applications, denied applications, or all applications. The filter is set to pending applications by default.




From the Approval Queue, you can perform the following tasks:

- View Application Status
- View Application Details
- View Application History Log
- View Required Documents
- Possible Offender Alert for Volunteer Applicant
- Criminal Background Screening for Volunteer Applicant
- Manually Approve Applicants

**Notes:**

- If your district has the *Automatically Approve When Requirements Satisfied* feature enabled, only those applications that do not have all requirements satisfied will display in the **Approval Queue** grid. You can view the reason these applications were flagged in the **Status** column or on the **Application Detail** workspace (see **View Application Status**).
- All applications for applicants under age 18 will bypass criminal background screening, if enabled, and go directly into the **Approval Queue**. A message is written to the Application History Log informing the volunteer coordinator that the applicant is under age 18.

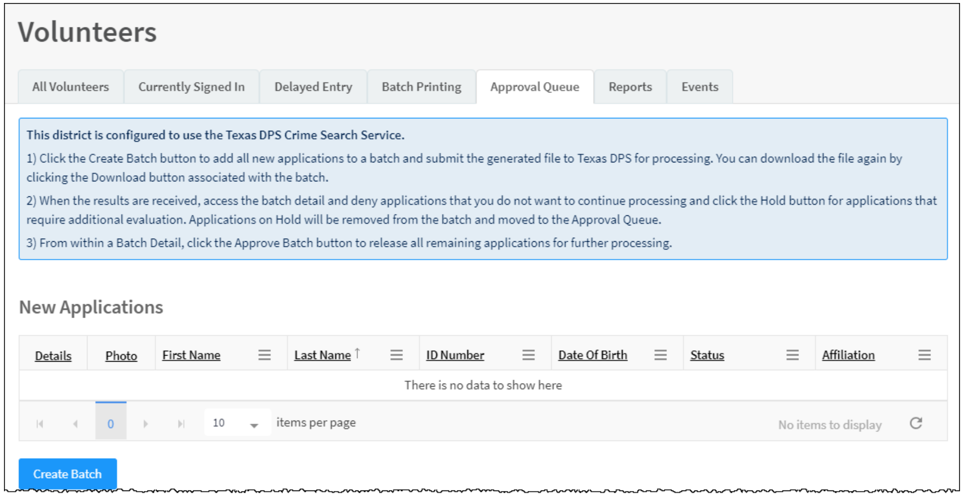
# Approval Queue – Texas DPS Screening

If your district has the Texas DPS screening feature enabled, the volunteer applications can be exported to a batch file and sent to the Texas DPS for screening. Once the applications are returned, the volunteer coordinator can take the appropriate action to process the application.

**Notes:**

- The Texas DPS screening feature is only available to districts within the state of Texas.
- If this feature is enabled, all applications for applicants under age 18 will not be added to the DPS batch and go directly to the approval queue for manual approval. A message is written to the Application History Log informing the volunteer coordinator that the applicant is under age 18.

If this feature is enabled, the **New Applications** grid displays on the **Approval Queue** workspace and applications go through the following workflow:

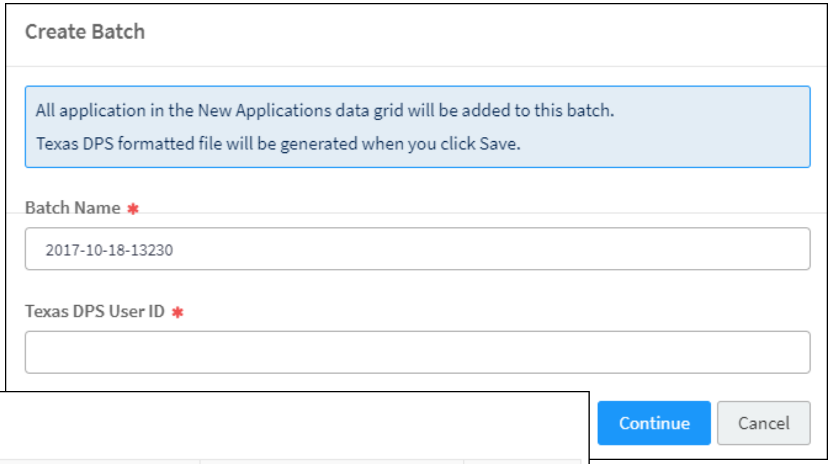


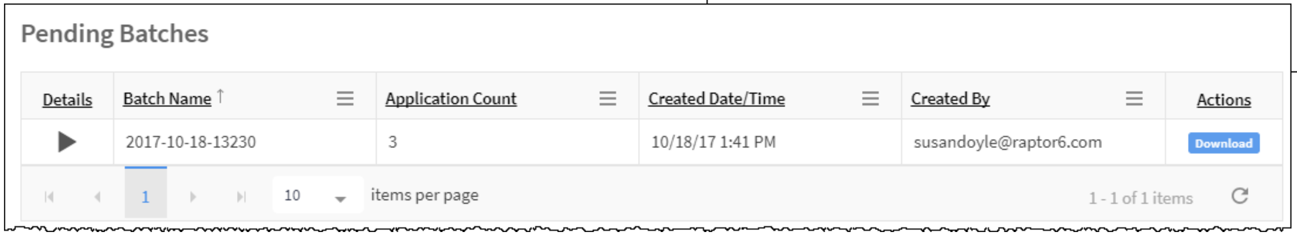

- The application status is set to *New* and the application is held in the **New Applications** grid on the **Approval Queue** workspace.
- A batch can be created (click **Create Batch**) when one or more applications are in the **New Applications** grid.
- A Texas DPS formatted file is generated and downloaded to the user's computer.
- The new batch is added to the **Pending Batch** grid on the **Approval Queue** workspace.
- The user submits the batch file to the external provider (Texas DPS) for processing.
- Upon receipt of the results from the external provider, the Volunteer Coordinator takes the appropriate action in the pending batch to process the applications (Approve, Deny or Hold).

# Texas DPS Screening – Create Batch

If the Texas DPS screening feature is enabled, all new applications display in the **New Applications** grid on the **Approval Queue** workspace. You must create a batch and submit the file to Texas DPS. When the results are received, you must complete the application approval process.

1. In the **New Applications** area on the **Approval Queue** workspace, click **Create Batch** to add all the new applications to a batch file.
2. Enter a **Batch Name*** (if different than default name) and your **Texas DPS User ID***, and then click **Continue** to create the batch file. The batch file is downloaded in text format to your computer and is moved to the **Pending Batches** grid on the **Approval Queue** workspace.



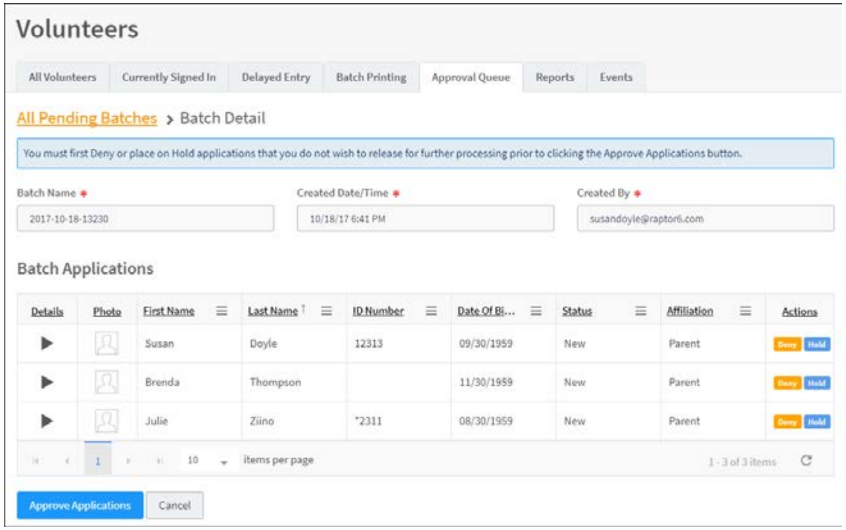




You can also download the batch file from the **Pending Batches** grid. In the **Actions** column, click **Download**.

# Texas DPS Screening – Create Batch, cont.

3. Submit the batch file to Texas DPS.
4. Upon receiving the results from Texas DPS, navigate to the **Pending Batches** area to continue processing the applications.
5. Click the ▶ icon to open the **Batch Detail**.
6. Click the ▶ icon to review the application details.
7. Click one of the following buttons to process the applications in the batch:

   **Note:** You must Deny or put on Hold any applications in the batch that are not going to be approved before clicking Approve Applications.



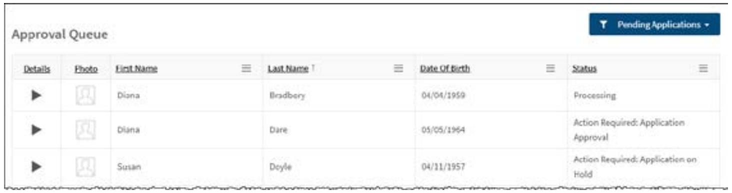

   - **Deny** – Click this button if you want to deny the application and remove it from the batch. Enter a **Reason for denial** on the dialog and click **Continue**. The application is removed from the batch and *Application Denied - <Reason>* is entered in the History Log for the application.
   - **Hold** – Click this button if you want to place a hold on the application for further processing. Enter a **Reason for Placing on hold** on the dialog and click **Continue**. The application is removed from the batch and moved to the **Approval Queue** with a *Pending* status. An *Application on Hold - <Reason>* is entered in the History Log for the application.
   - **Approve Applications** – Click this button to approve any applications that remain in the batch and are approved for processing. Click **Continue** on the confirmation dialog to release the application from the batch and continue processing. A *Released from Texas DPS Batch <Batch Name>* is entered in the History Log for the application.

RAPTOR TECHNOLOGIES

# View Application Status

Users with the *Can Approve Volunteers* permission can view the status of a volunteer's application as it goes through the approval process. This allows the volunteer coordinator to view the current state and take the necessary action.

1. From the navigation menu, select **Modules > Volunteers** and then click the **Approval Queue** tab.
2. In the **Approval Queue** grid, view the current state of the application in the **Status** column. The following statuses are available:

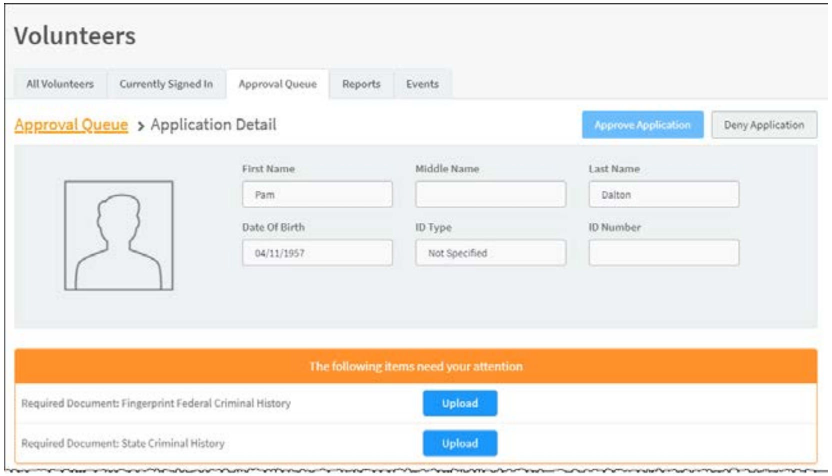



- **Processing** – The Raptor System is processing the application and no action can be taken until the processing is complete.
- **Action Required: Review Alert(s)** – This informs the Volunteer Coordinator that the applicant has one or more possible sex offender alerts; they need to review the alerts to determine if they are a match to the applicant.
- **Action Required: Review Background Check** – This informs the Volunteer Coordinator that a criminal record has been returned and they need to review it.
- **Action Required: Application on Hold** – This status is only associated with the Texas DPS; it displays when the Volunteer Coordinator has put the application on hold until more information can be obtained to approve the application.
- **Action Required: Complete Requirement(s)** – This status indicates that one or more requirements and/or required documents need to be reviewed and marked as complete before moving the application further through the process.
- **Action Required: Application Approval** – This status informs the Volunteer Coordinator that the application is ready for final approval.
- **Approved: Awaiting Expiration** – No action required from the Volunteer Coordinator. When the volunteer's current term expires, this new application will be applied to the volunteer's profile.

# View Application Details

You can access and view the details of an application in the **Approval Queue** grid on the **Approval Queue** workspace.

1. From the navigation menu, select **Modules > Volunteers** and then click the **Approval Queue** tab.
2. In the **Approval Queue** grid, click the ▶ icon in the **Details** column for the application.



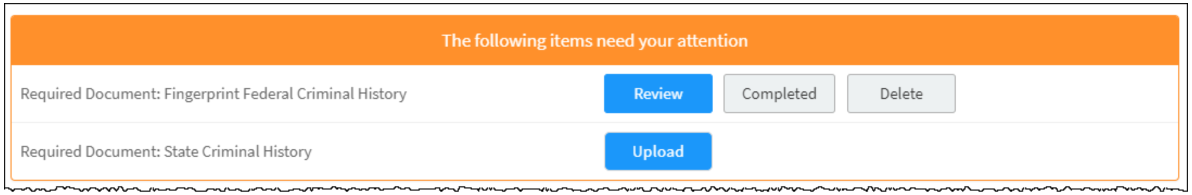

If the application requires attention prior to approval, the items that need to be addressed are displayed under the call to action banner.

For example, if an applicant must provide required documents for a function specified in their application, these items will be listed in this area. Also, if a possible offender alert has been triggered, you can review the alert here prior to approving the applicant. See Possible Offender Alert for Volunteer Applicant.

In addition, if there are requirements associated with functions where an applicant has selected these functions, the requirements must be satisfied and marked as complete before you can complete the approval process.

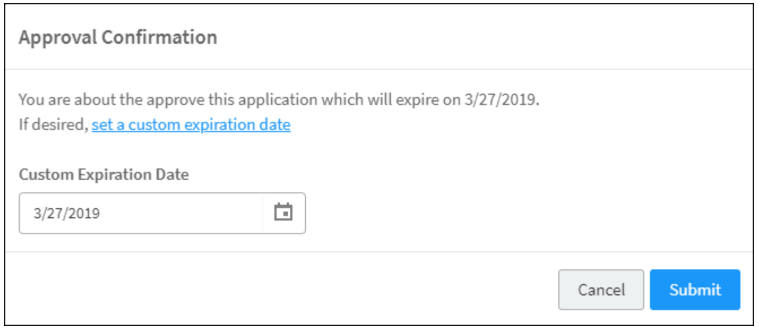
# View Application Details, cont.

3. On the **Application Detail** workspace, if documentation is required prior to approval, click **Upload** and navigate to the document.




4. Once the document is uploaded, click **Review** to verify that everything is accurate, and then click **Completed** to indicate the requirement has been satisfied.

   If you want to remove the document to replace it with another uploaded document, click **Delete**.
5. On the **Document Completed Confirmation** dialog, click **Continue**. The item is removed from the list.
6. After all items have been addressed, the call to action banner displays the message *Final application approval is required*.
7. Click **Approve Application**.
8. On the **Approval Confirmation** dialog, if you want to specify a custom expiration date, click the link and select the date from the calendar.
9. Click **Submit** to approve the application.



# View Application History Log

The **History Log** grid on the **Application Detail** workspace displays the date/time of activity related to the volunteer application process. The History Log includes the date and time of the activity, the activity description and the name of the user performing the activity. Some activities that display in this log include:

History Log

| Timestamp | Activity | Performed By |
|---|---|---|
| 12/16/16 5:28 PM | Application Submitted Online | Auto Process |
| 12/16/16 5:28 PM | Background Check Submitted - WPS-1823853 | Auto Process |
| 12/16/16 5:28 PM | No Alerts | Auto Process |
| 12/16/16 5:28 PM | Awaiting Background Check Results | Auto Process |

- Application Submitted Online
- Background Check Submitted
- Alerts Ready for Review – Indicates there are possible sex offender alerts ready to be reviewed by a user with the *Can Approve Volunteers* permission.
- No Alerts – Indicates there are no possible sex offender alerts associated with the volunteer applicant.
- Awaiting Background Check Results – Indicates the background check is in progress and results have not yet been returned.
- Background Check Results Ready for Review – Indicates the background check has been returned but needs reviewed.
- Background Check Reviewed – Indicates the background check has been reviewed.
- Background Check Results – No Criminal Record – Indicates the background check returned no criminal record for the volunteer applicant.
- Requirement <name of requirement> Complete
- Application Approved

# View Required Documents

The **Required Documents** grid on the **Application Detail** workspace displays the required documents for volunteer applicants, the upload timestamp, status, the user who performed the upload and an option to preview the document.

To preview the document, click the icon in the **Options** column.

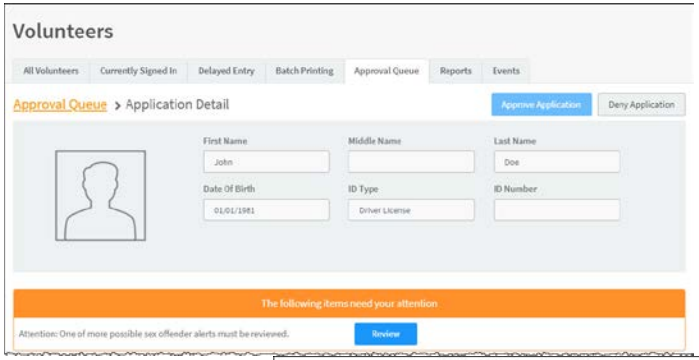
Required Documents

| Name | Upload Timestamp | Status | Performed By | Options |
|---|---|---|---|---|
| Fingerprint Federal Criminal History | 03/12/18 11:03 AM | Completed | Diana DistrictAdmin | |
| State Criminal History | 03/12/18 11:11 AM | Completed | Diana DistrictAdmin | |

**Note:** After an application has been approved or denied, the uploaded documents are still accessible from the application.

# Possible Offender Alert for Applicant

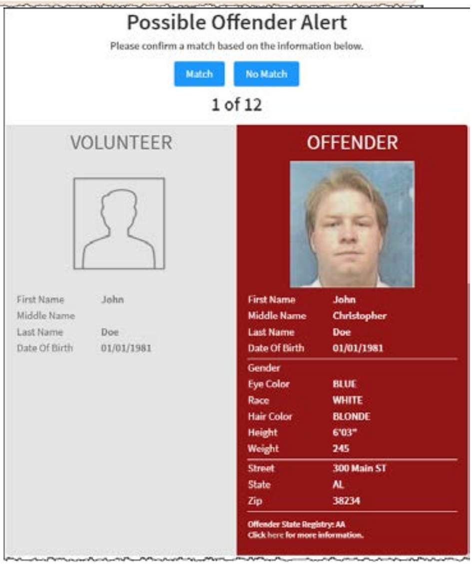
If a Possible Offender Alert is generated from a volunteer applicant, the volunteer coordinator will be prompted to review the information before approving the applicant. The Offender Check for volunteer applications feature must be enabled by Raptor.




1. On the **Application Detail** workspace, click **Review**.
2. On the Possible Offender Alert dialog, 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 Volunteer and the Offender information.

   It is recommended that you compare the address to verify a match. Not all states provide offender photos and details.

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




3. Click **Match** or **No Match**.
   - If **Match**, click **Yes** to confirm or click **Cancel**.
   - If **No Match** and there are multiple records, the next possible match displays on screen.

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).

After the applicant has been reviewed, the volunteer coordinator can approve or deny the application. See Manually Approve Application.

# 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.

**Note:** Applicants under age 18 will not be screened.

1. On the **Application Detail** workspace, click the ▶ icon in the Details column in the Application Queue grid for the volunteer applicant.

   If the criminal background screening determines that the application needs additional review, an item *Criminal background screening needs to be reviewed* displays in the call to action section 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.

2. Click **Review** to view the criminal background search results.
3. After reviewing the criminal record, click **Completed**.
4. Click **Approve Application** or **Deny Application**.

   **Note:** The **Approved Application** button is only available if all requirements have been satisfied. Otherwise it is greyed out.

   If you click **Deny Application**, 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**.

# WATCH Criminal Background Screening

If you have the Criminal Background Screening feature enabled and are using Washington Access To Criminal History (WATCH), when a criminal record is returned for a volunteer applicant, the volunteer coordinator will receive an email indicating that a volunteer application needs attention, and the status *Attention: Criminal background screening needs to be reviewed* is displayed in the **Approval Queue** grid.

**Note:** This feature is only available in the state of Washington; and applicants under age 18 are not screened.

1. On the **Application Detail** workspace, click the ▶ icon in the **Details** column in the **Application Queue** grid for the volunteer applicant.

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

2. Click **Review** to view the criminal background search results in a new window. One of the following WATCH responses is returned based on the applicant's name and birth date:

   - **Exact Match** – There was a record in their criminal history system with an exact match to the name and date of birth of the applicant. Click the link in the SID column to review the results.

     WATCH Results

     | SID | Name | Sex | Race | DOB |
     |---|---|---|---|---|
     | WA99999999 | *GREENE,PAUL C | M | U | 10/4/1990 |

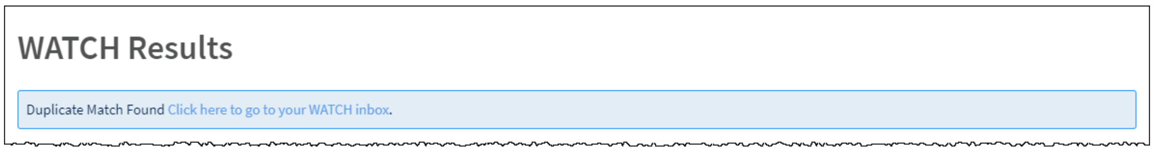
   - **Candidate List** – There was more than one record returned where the name and date of birth are close enough to be considered a possible match. Click the link in the SID column to review each of the results.

     WATCH Results

     | SID | Name | Sex | Race | DOB |
     |---|---|---|---|---|
     | WA24709553 | *HERNANDEZ,JOSE ALFRE | M | W | 1/17/1997 |
     | WA28274613 | HERNANDEZ,JOSE DE JESUS JR | M | U | 1/5/1998 |
     | WA28596935 | HERNANDEZ,JESUS ENRIQUE | M | W | 6/21/1997 |
     | WA28838159 | HERNANDEZ,JOSUE | M | W | 3/27/1997 |
     | WA28517056 | HERNANDEZ,JESUS | M | U | 1/30/1996 |
     | WA28660812 | HERNANDEZ,JESSE CHASE | M | W | 7/1/1998 |

# WATCH Screening, cont.

- **Duplicate Match Found** – Indicates there may be two or more exact name and date of birth matches to the applicant and a more advanced search must be conducted. Click the link **Click here to go to your WATCH inbox**, login to WATCH, and locate the applicant's entry to access the necessary WATCH form.




3. After reviewing the RAPsheet(s), click **Completed**.
4. Click **Approve Application** or **Deny Application**.

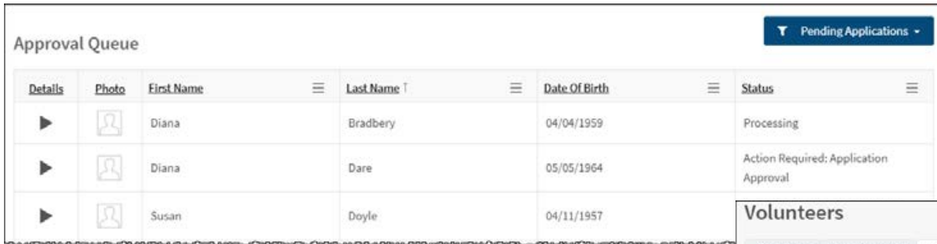
   If you click **Deny Application**, the **Reason for denial** dialog displays. Enter the reason why the application has been denied and then click **Continue**. If you want to cancel your action, click Cancel.

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

# Manually Approve Application

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

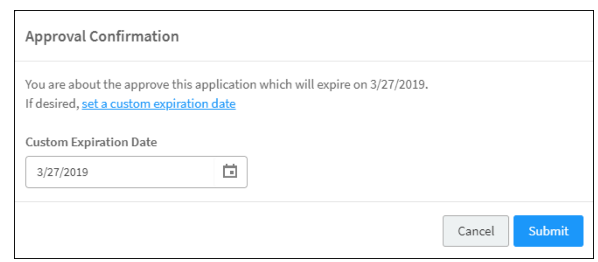
1. In the **Approval Queue** grid, select **Pending Applications** from the **Filter** drop-down list.




2. In the Details column, click the ▶ icon for the volunteer applicant.
3. On the **Application Detail** workspace, click **Approve Application** or **Deny Application**.


- If you click **Approve Application**, the **Approval Confirmation** dialog displays. Click **Submit** to approve the application or **Cancel** to cancel the action.

  If you want to specify a custom expiration date, click the link and select the date from the calendar.




- If you click **Deny Application**, 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**.

# Manually Approve Application, cont.

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.

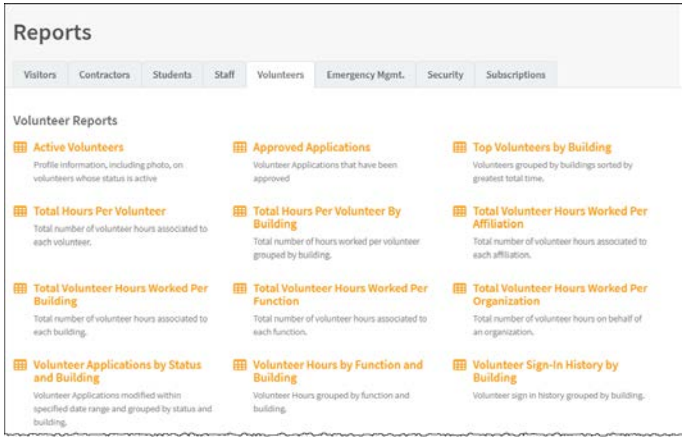
If the automated process is unable to create a Volunteer Portal user account, the volunteer coordinator can manually create a user account for the Volunteer Portal. See Create Volunteer Portal User Account.

**Notes:**

- 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.
- Applicants with possible sex offender alerts, a returned criminal record, or under age 18 will require manual approval even if the *Automatically Approve When Requirements Satisfied* setting is enabled.

# Volunteer Reports

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



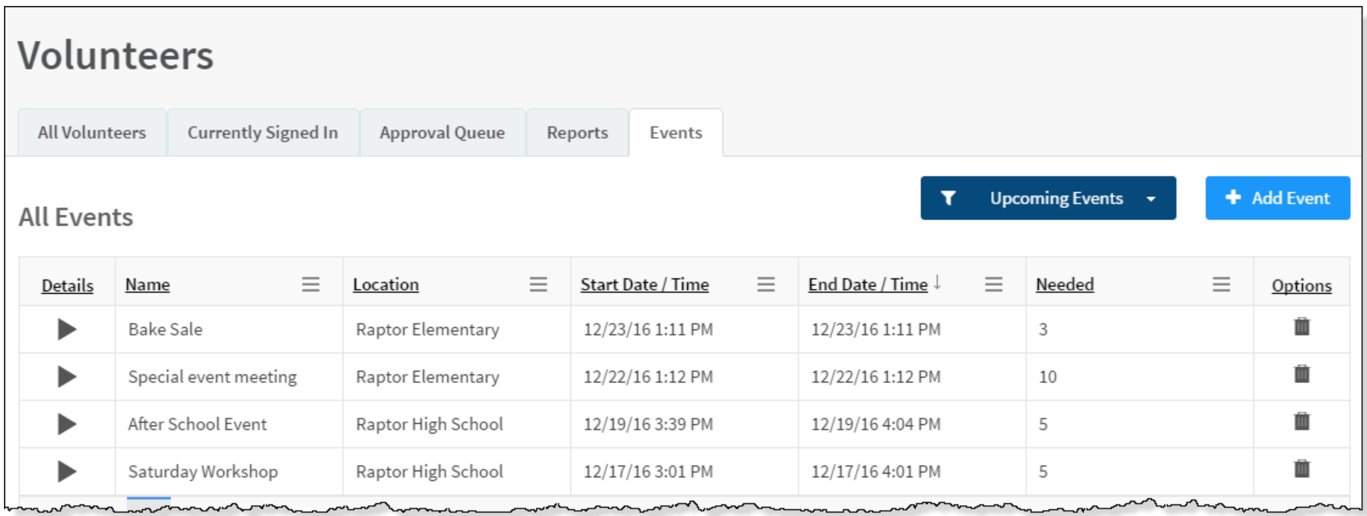

- **Active Volunteers** – Profile information for volunteers with active status, including photo.
- **Approved Applications** – Volunteers that have gone through the approval process.
- **Top Volunteers by Building** – Volunteers grouped by buildings and sorted by greatest total time.
- **Total Hours Per Volunteer** – Total number of volunteer hours associated to each volunteer.
- **Total Hours Per Volunteer By Building** – Total number of hours worked per volunteer grouped by building.
- **Total Volunteer Hours Worked Per Affiliation** – Total number of volunteer hours associated to each affiliation.
- **Total Volunteer Hours Worked Per Building** – Total number of volunteer hours associated to each building.
- **Total Volunteer Hours Worked Per Function** – Total number of volunteer hours associated to each function.
- **Total Volunteer Hours Worked Per Organization** – Total number of volunteer hours on behalf of an organization.
- **Volunteer Applications by Status and Building** – Volunteer applications modified within specified date range and grouped by status and building.
- **Volunteer Hours by Function and Building** – Volunteer hours grouped by function and building.
- **Volunteer Sign-In History by Building** – Volunteer sign in history grouped by building.

See Running 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 to see this tab.

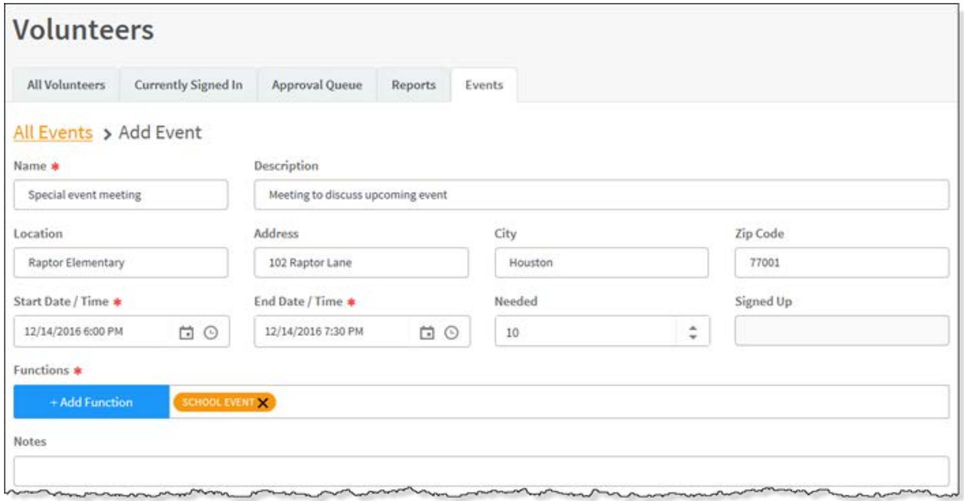
You can view all the events on the **All Event** workspace. Use the **Filter** drop-down to narrow the search for specific events. You can filter to display Scheduled Events, Past Events and All Events.



# 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** and complete the following:



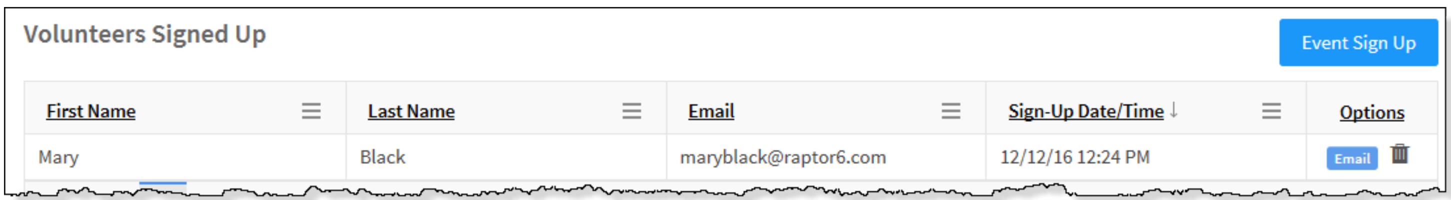

   - **Name***
   - **Description**
   - **Location**
   - **Address**
   - **City/Zip Code**
   - **Start Date/Time*** – Select the date and time the event starts.
   - **End Date/Time*** – Select the date and time the event ends.
   - **Needed** – Select the number of volunteers needed to help with the event.
   - **Signed Up** – *Read-only*. 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.
3. 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** grid 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 |

## Remove Volunteers Signed Up for Event

To remove a volunteer who has signed up for an event and reset the **Signed Up** number to reflect the change:

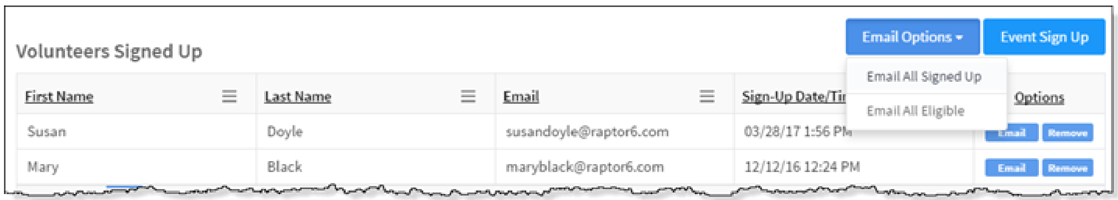
1. Click **Remove** in the **Options** column and then click **Yes** on the **Removal Confirmation** dialog.
2. On the **Email Removed Volunteer** dialog, complete the **Message** and click **Send**.

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

# Send Email to Volunteers

Users with the *Can Manage Events* permission can send an email to all volunteers who have signed up for a specific event or to all eligible volunteers from the **Events** tab.

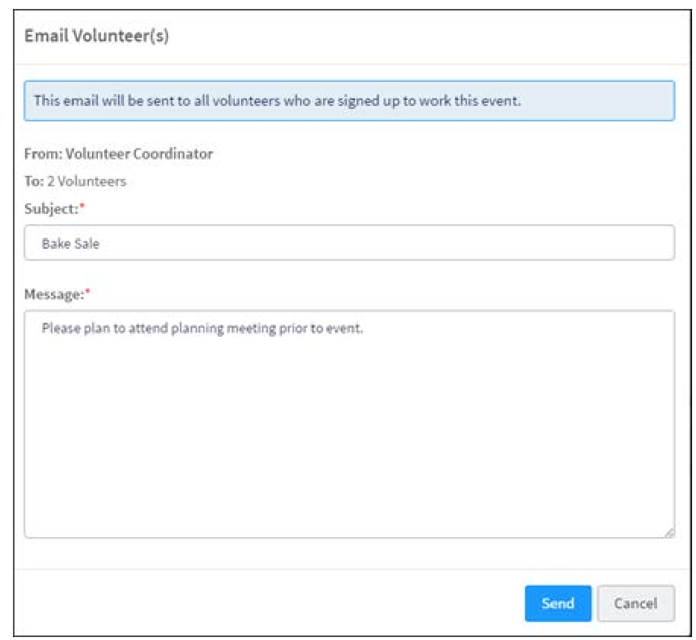
1. From the navigation menu, select **Modules > Volunteers** and then click the **Events** tab.
2. On the **All Events** workspace, click the ▶ icon next to the event to expand the **Event Detail**.




3. In the **Volunteers Signed Up** grid, click **Email Options** and select one of the following:
   - **Email All Signed Up** – Select this option to send an email to all volunteers who are signed up for the event.
   - **Email All Eligible** – Select this option to send an email to all eligible volunteers who can volunteer for the event.

   To send an email to an individual volunteer who is signed up for the event, click **Email** in the **Options** column.

   **Note:** If the volunteer does not have an email address in their profile, the **Email** button does not display.



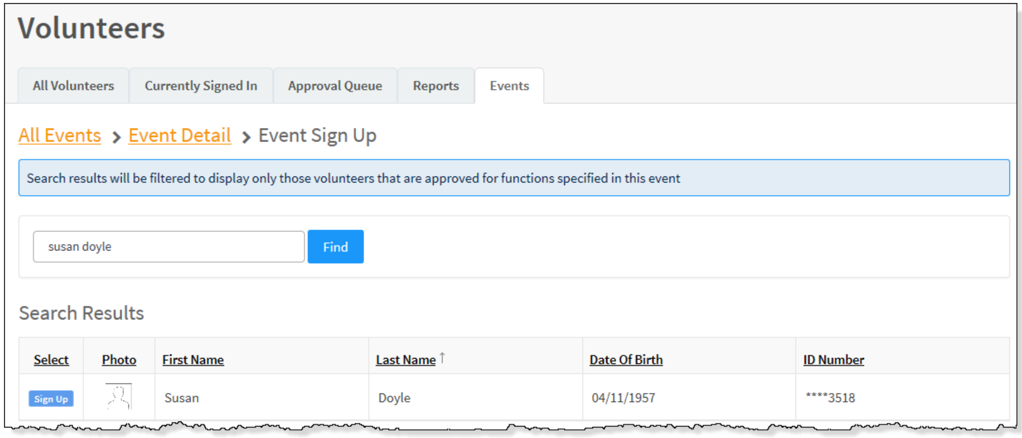

4. Enter the email **Subject** and **Message**, and then click **Send**.

# 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 for the event.
3. On the **Event Detail** workspace, navigate to the **Volunteers Signed Up** grid and click **Event Sign Up**.
4. Enter the volunteer's **First** and/or **Last Name** and click **Find**.
5. In the **Search Results**, 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** grid for the event and the number in the **Signed Up** field increments.

# Roles and Permissions

Raptor users have a unique set of permissions assigned to them based on the type of user account (role) that they have been assigned. The permissions assigned to the account determine what they can see and do in Raptor.

The following topics are covered in this section:

# Volunteer User Accounts (Roles)

| Role | Description |
|---|---|
| District Volunteer Coordinator | The District Volunteer Coordinator role is assigned to users who manage volunteers and events, and are automatically assigned to all schools and buildings within the district. Users with this role can sign in and sign out volunteers, search volunteers and run volunteer reports. Typically, a volunteer coordinator is also responsible for adding volunteers, approving volunteers, and coordinating volunteer events.<br>Note: The Volunteer Module must be enabled to create District Volunteer Coordinator accounts. |
| Building Volunteer Coordinator | The Building Volunteer Coordinator role is assigned to users who manage volunteers and events at the school level. Users with this role can sign in and sign out volunteers, run volunteer reports, and approve volunteers for only the schools to which they are assigned.<br>Note: The Volunteer Module must be enabled to create Building Volunteer Coordinator accounts. |
| Volunteer | The Volunteer role is assigned to approved volunteers. |

# Understanding Permissions

Each user is assigned a role that has specific permissions associated with it, and the permissions can be enabled or disabled. Typically, permissions are selected when the user account is created.

When creating a user account, the user can only grant permissions that their account includes. For example, if you are a District Admin and do not have the *Can Manage Logs* permission, you cannot create user accounts and grant the *Can Manage Logs* permission.

Refer to the following tables to understand the permissions that are available for each role.

# Administration Permissions

| Permission | Description | Role |
|---|---|---|
| Can Manage Users | Provides access to the Users/Contacts menu item under the Admin menu. With this permission, a user can view, create, modify, active and deactivate Raptor user accounts, and reset the password for the account. The role of the user creating the user accounts restricts the type of user account role they can create:<br>The District Volunteer Coordinator can create other District Volunteer Coordinators, Building Volunteer Coordinators and Volunteers.<br>In addition, the user creating the user accounts can only assign the buildings their own account is associated with to the new user accounts. | District Volunteer Coordinator<br>Building Volunteer Coordinator |
| Can Manage Report Subscriptions | Provides access to the Subscriptions tab on the Reports page. With this permission, you can add, modify and delete report subscriptions. | District Volunteer Coordinator<br>Building Volunteer Coordinator |

# Volunteer Permissions

| Permission | Description | Role |
| --- | --- | --- |
| Can Sign In Volunteers | User can sign in volunteers and access the Delayed Entry and Batch Printing features. | District Volunteer Coordinator<br>Building Volunteer Coordinator |
| Can Sign Out Volunteers | User can view volunteers and sign out volunteers (single or multiple sign out). | District Volunteer Coordinator<br>Building Volunteer Coordinator |
| Can Run Volunteer Reports | User can view, create, manipulate and export reports related to volunteers; can access the Volunteer Dashboard. | District Volunteer Coordinator<br>Building Volunteer Coordinator |
| Can Manage Volunteers | User can search volunteers, add volunteers, and delete volunteer details. | District Volunteer Coordinator<br>Building Volunteer Coordinator |
| Can Manage Volunteer Settings | User can change Volunteer Management settings and manage functions, requirements, required documents, organizations, affiliations, and custom fields; change Sign-In/Out settings; change Volunteer Application settings and manage notifications, and online application page content; change Volunteer Portal settings and manage notifications; and change Event Management settings. | District Volunteer Coordinator<br>Building Volunteer Coordinator |

# Volunteer Permissions, cont.

| Permission | Description | Role |
|---|---|---|
| Can Import Volunteers | User can import volunteers and volunteer applications.<br>Note: This permission requires that the user also have the Can Manage Volunteers permission. | District Volunteer Coordinator<br>Building Volunteer Coordinator |
| Can Manage Events | User can view, create, update, disable, and delete events, sign up volunteers or remove volunteers from events, and email volunteers. | District Volunteer Coordinator<br>Building Volunteer Coordinator |
| Can Approve Volunteers | User can view and approve volunteer applicants. | District Volunteer Coordinator<br>Building Volunteer Coordinator |
| Can View Events | User (volunteer) can view upcoming events and the events for which they have signed up. | Volunteer |
| Can Sign Up Events | User (volunteer) can sign up for events. | Volunteer |
| Can Edit Volunteer Hours | User (volunteer) can edit the hours they entered in the Volunteer Portal. | Volunteer |
| Can Access Volunteer Portal | User (volunteer) can log in to the Volunteer Portal. | Volunteer |

# Online Volunteer Application

This section provides instructions for completing the online volunteer application. It includes the following topics:

- Online Volunteer Application

# Online Volunteer Application

Volunteer applicants must complete this application to be approved as a volunteer for school events and activities.

1. Click the link for the online volunteer application.

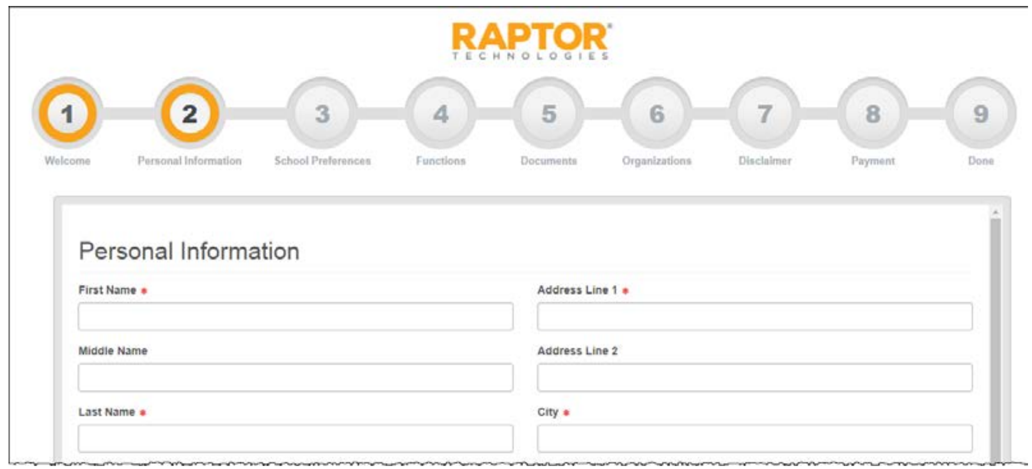

2. On the **Welcome** screen, review the introductory information that displays and then click **Next** to continue.

   If you want to exit the application, click **Cancel Application**.

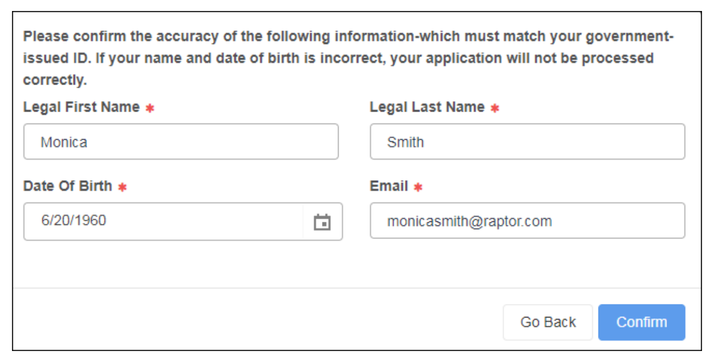
# Online Volunteer Application, cont.

3. On the Personal Information screen, complete the information on the screen.
   - First Name*
   - Middle Name
   - Last Name*
   - Maiden Name
   - Gender*
   - Date of Birth*
   - Address*
   - City*/State*/Zip Code*
   - Phone Number*
   - Affiliation*
   - Email*

   The fields marked with an asterisk (*) are required.



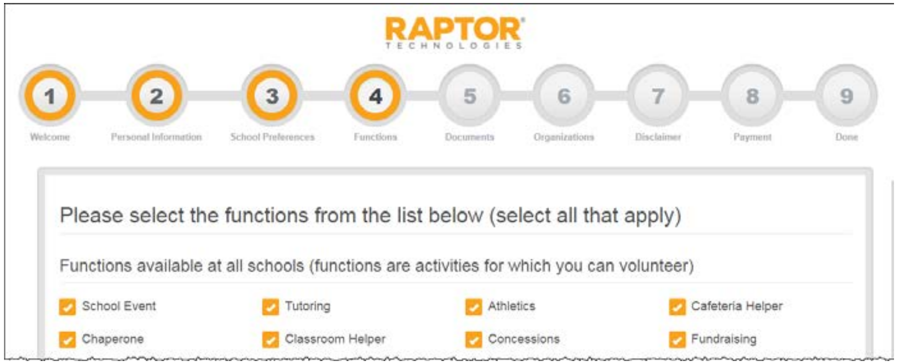

4. Click **Next**.
5. Review the information that is displayed on the confirmation dialog. If the information is correct, click **Confirm**. If corrections are necessary, correct the information in the dialog before proceeding.



# Online Volunteer Application, cont.

6. On the **School Preferences** screen, select the check boxes for the schools at which you would like to volunteer and then click **Next**.

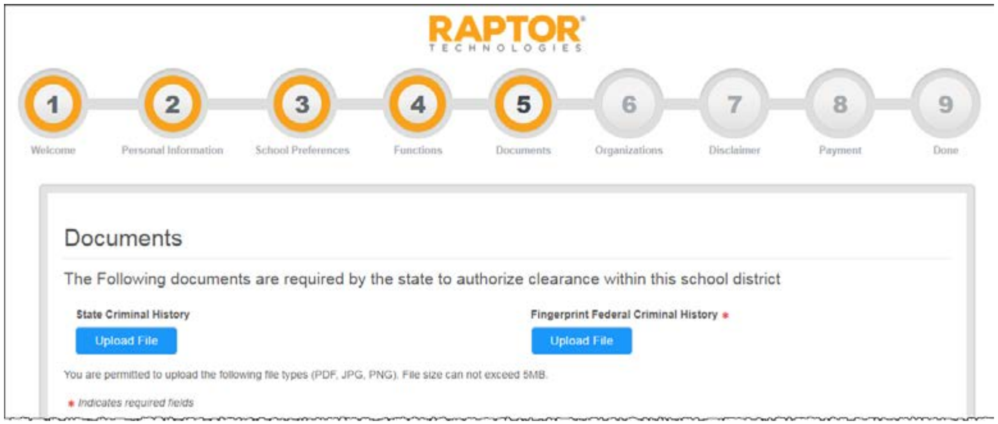

7. On the **Functions** screen, select the check boxes for the functions (activities) for which you would like to volunteer and then click **Next**.



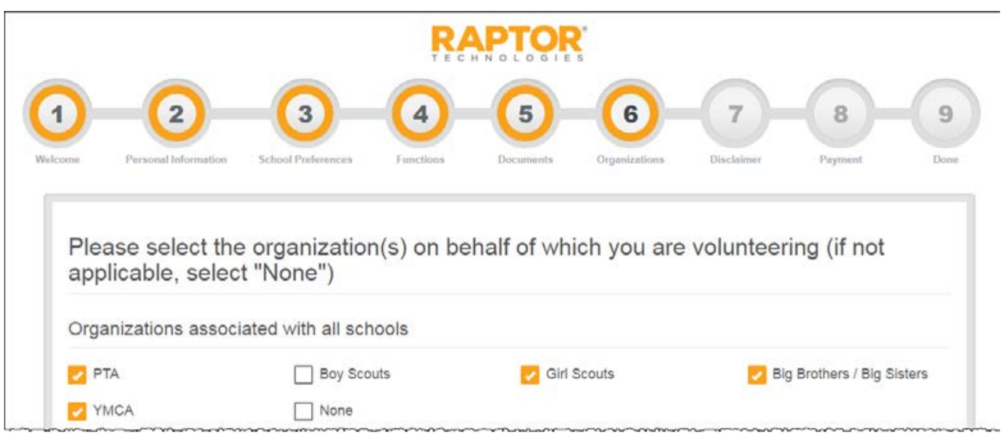

**Note:** The Buildings selected on the School Preferences screen determine the Functions that are listed.

# Online Volunteer Application, cont.

8. On the **Documents** screen, upload the required documents and click Next. If there are no required documents, this page is not displayed.



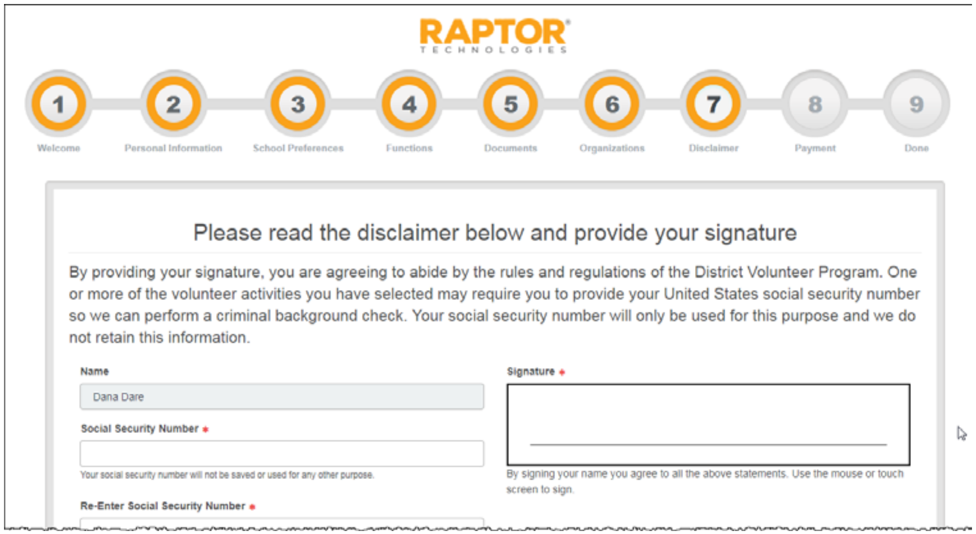

9. On the **Organizations** screen, select the check box for the organization to which you are associated and then click **Next**.




**Note:** The Buildings selected on the **School Preferences** screen determine the Organizations that are listed. If there are no organizations defined for the selected building, the Organization page is not displayed.

# Online Volunteer Application, cont.

10. Read the **Application Disclaimer** and then click in the **Signature** box and use the mouse or touch screen to sign your name.




**Notes:**

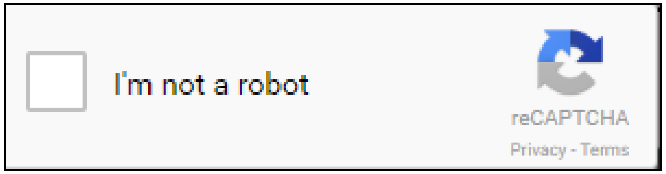
- If the *Criminal Background Check* feature is not enabled, the Social Security Number field will not display on this page.
- If applicant is under age 18 or the WATCH background check is used, the social security field will not display.

11. If the *Criminal Background Check* feature is enabled and the applicant selected a function that requires a background check, the applicant's Social Security Number will be required on the Disclaimer page.

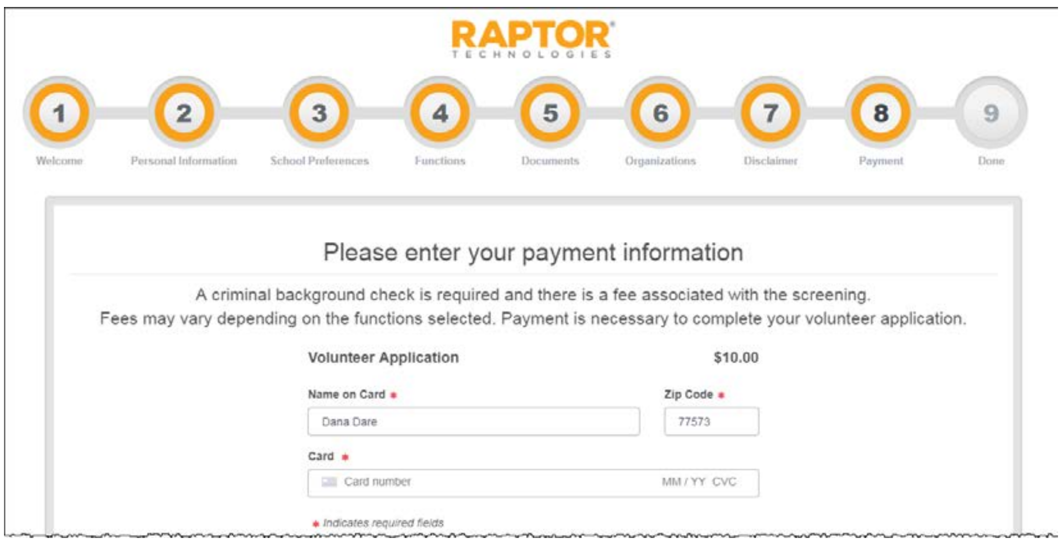
    Enter your social security number and then re-enter it to confirm the number.

# Online Volunteer Application, cont.

12. Select the check box on the CAPTCHA dialog to continue.



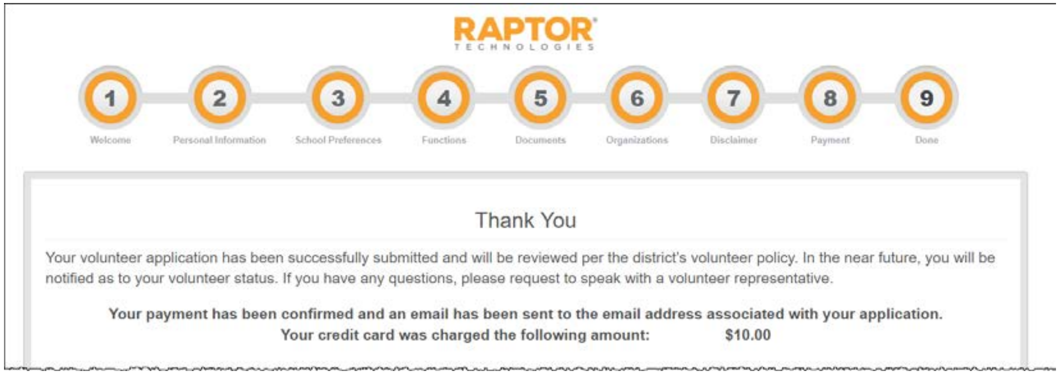

If you have selected one or more functions that require a background check that has an associated cost that will be paid by the applicant, the **Payment** screen will display where you can provide payment information.




13. Enter the credit card information and click **Next**.

# Online Volunteer Application, cont.

14. On the **Done** screen, click **Finish**.




The applicant will receive an email notifying them that their application has been received and is being processed. Upon approval, they will be sent an email notifying them that their application has been approved.

If the district has enabled the Volunteer Portal, a link to access the portal will be included in the approval email.

# Using Volunteer Portal

The Volunteer Portal is available with the Raptor Volunteer Management System and provides an easy-to-use portal for your volunteers. This section includes the following topics:

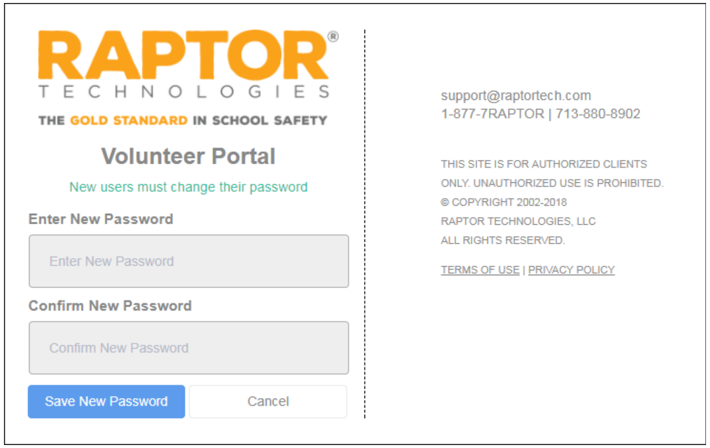
# Log In/Log Out Volunteer Portal

The Volunteer Portal is available with the Raptor Volunteer Management System and provides an easy-to-use portal for your volunteers to sign up for events, track and log hours, view and update their profile, change their password, and communicate with other volunteers.

Upon approval as a volunteer and creation of your volunteer portal user account, you will be sent an email informing you that you have been approved. If the Volunteer Portal is enabled, the instructions to access the portal will be included in the email.

## New Users Must Change Password

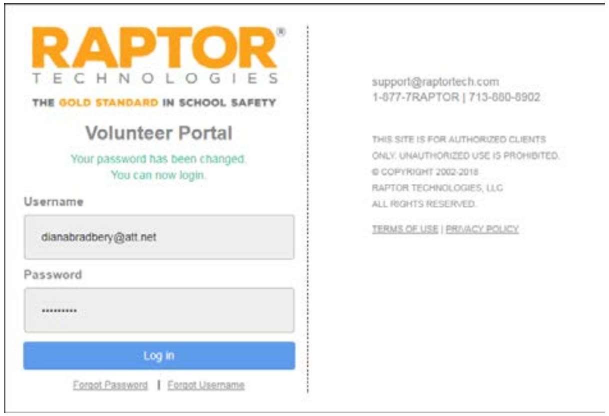
1. Click the link in the email to create a new password.
2. Enter a new password, confirm your new password and then click **Save New Password**.




The Volunteer Portal Log In screen displays.

## Log In

On the Volunteer Portal Log In screen, enter your **Username** (email address) and **Password**, and then click **Log In**.

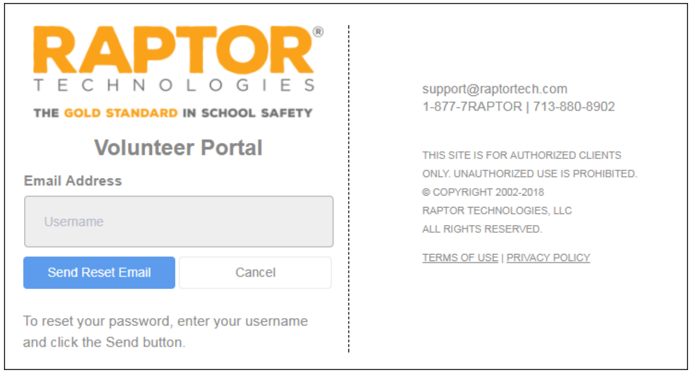


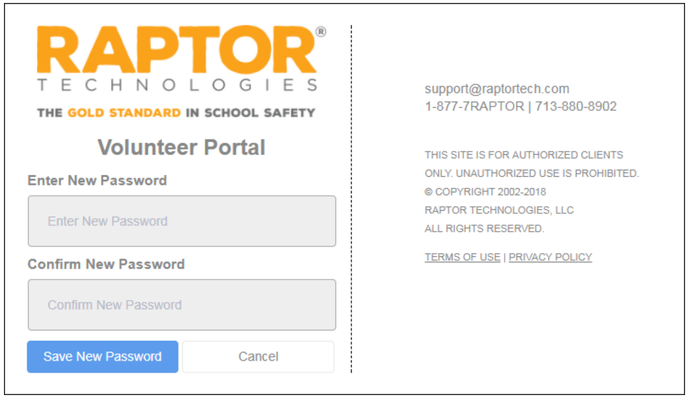
# Log In/Log Out Volunteer Portal, cont.

## Request Forgotten Password

1. On the Volunteer Portal Log In screen, select the **Forgot Password** link.
2. Enter your **Username** and then click **Send Reset Email**.
3. Open the email that was sent to you and click the **Please click here link** to confirm your request and reset your password.
4. Enter a **New Password** and then re-enter to confirm it.
5. Click **Save New Password**.

The Volunteer Portal Log In screen displays with a message indicating your password has been changed. You can now log in to the Volunteer Portal with your new password.




## Request Forgotten Username

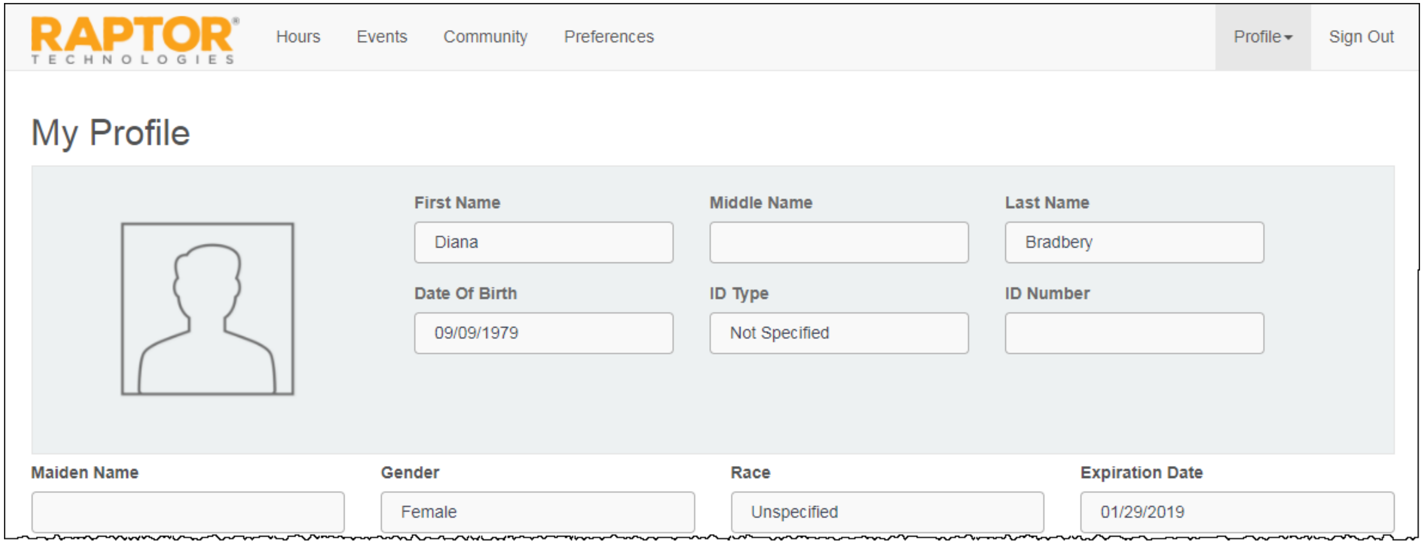
If you have forgotten your user name, select the **Forgot Username** link. A message displays informing you that your user name is your email address.

## Log Out of Volunteer Portal

To log out of the Volunteer Portal, select **Sign Out** in the upper right corner of the portal.

# Manage Volunteer Profile

The Volunteer Portal opens and displays the **My Profile** workspace, where the volunteer can view and edit their profile.



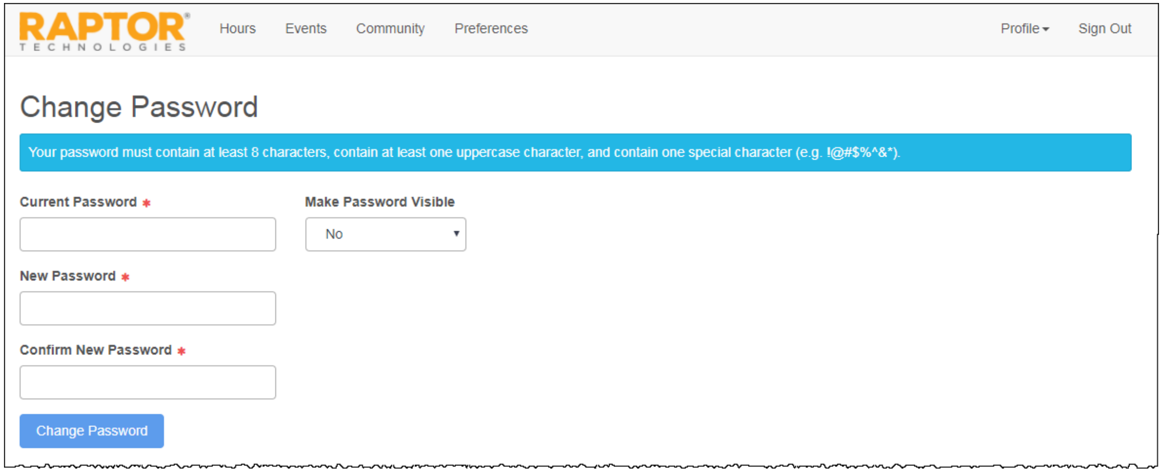

The information in the upper portion of the screen is *read only* and cannot be changed. Volunteers can update their address information, phone number and language preference.

Click **Save** after making any changes.

# Change Password

Volunteers can change their password at any time from within the Volunteer Portal.

1. On the **My Profile** workspace, click the **Profile** tab and select **Change Password** from the drop-down menu.

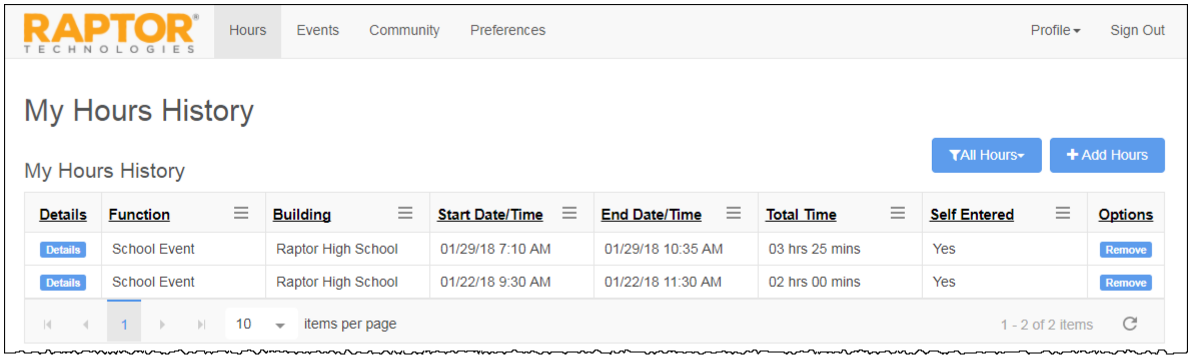



2. Enter your **Current Password** in the text box.
3. If you want the password to be visible on this screen, select **Yes** from the **Make Password Visible** drop-down list.
4. Enter **a New Password** in the text box and re-enter it in the **Confirm New Password** text box.
5. Click **Change Password**.

A message displays indicating your password was successfully changed.

# Manage Hours

Use the **Hours** tab on the Volunteer Portal to view a history of the hours you have volunteered.

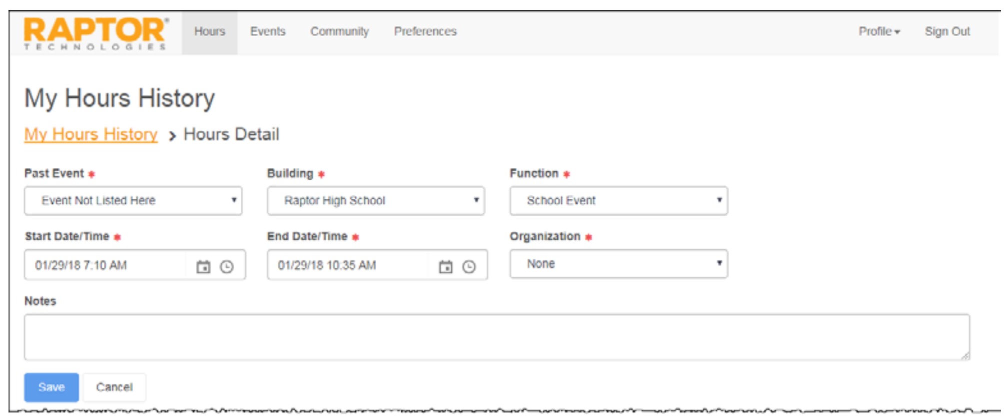



## View All Hours

Volunteers can view all the functions and total time volunteered from the **My Hours History** workspace. On the Volunteer Portal, click the **Hours** tab. The functions, start date and time, end date and time, and total time displays.

## View Hour Details

Volunteers can view the details of the hours logged from the **Hours Detail** workspace. Click **Details** next to the function.



# Add Hours

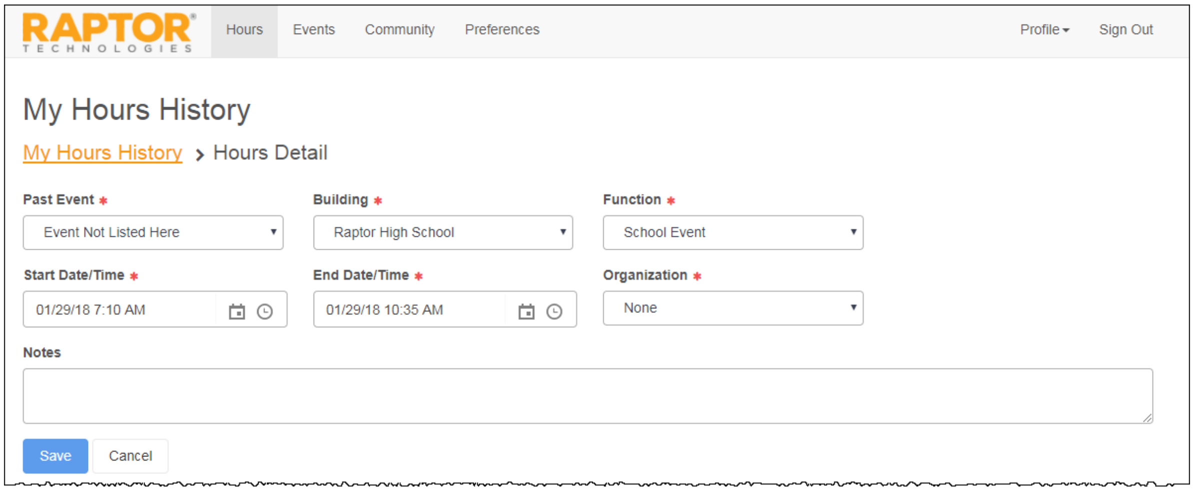
When the **Allow Volunteers to Add Hours** setting is enabled, volunteers can add the hours that they volunteered in the Volunteer Portal.

1. On the Volunteer Portal, click the **Hours** tab.
2. On the **My Hours History** workspace, click **Add Hours** and then specify the following information:


   - **Past Event***– Select the event where you volunteered. If the event is not listed, select **Event Not Listed Here**.
   - **Function*** – Select the function you performed during the event.
   - **Building*** – Select the building where you volunteered for this event. If the building is not listed, select **Location Not Listed**.
   - **Start Date/Time*** – Select the date and time you began volunteering.
   - **End Date/Time*** – Select the date and time you stopped volunteering.
   - **Organization*** – If you specified an organization in your volunteer profile, select the organization. You can also select **None**.
   - **Notes** – Optionally, enter notes about the event.
3. Click **Save**.

# Modify or Delete Hours

Users with the *Can Edit Volunteer Hours* permission can edit the volunteer hours that they added to the volunteer portal. The **Allow Volunteers to Add Hours** setting must be set to **Yes** to be able to modify or delete hours.




## Modify Hours

1. Click **Details** next to the function.
2. Modify the **End Date/Time** and click **Save**.

## Delete Hours

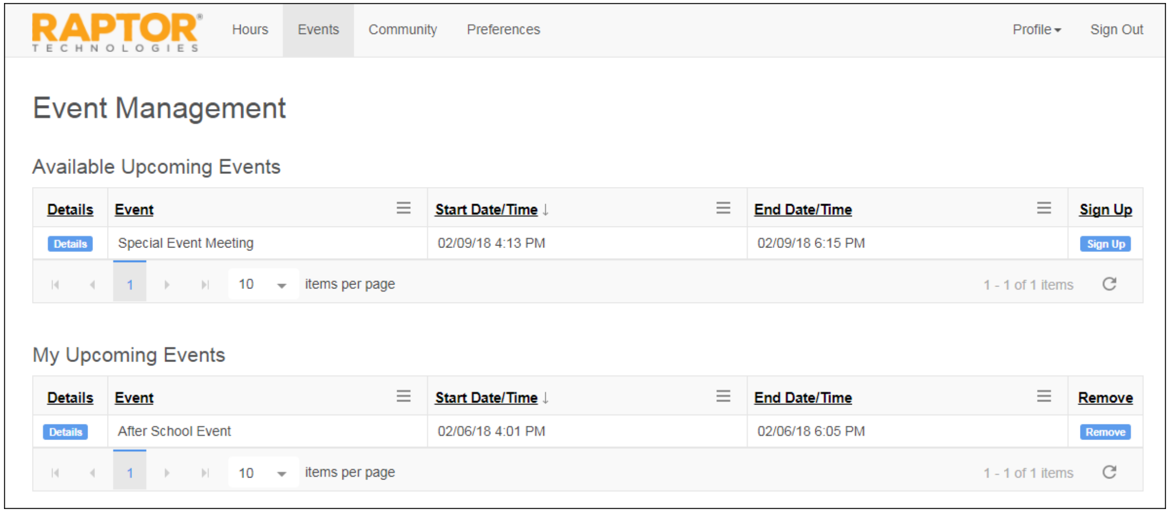
Volunteers can delete the hours that they volunteered in the Volunteer Portal.

In the **My Hours History** grid, locate the entry you want to delete, and click **Remove** and then click **Yes** on the confirmation dialog.

**Note:** A volunteer can modify or delete those hours they added; not hours related to a sign in.

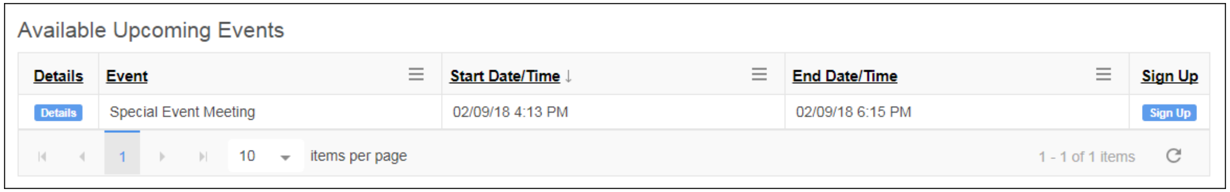
# Manage Events

Use the **Events** tab on the Volunteer Portal to manage the events for which you are volunteering.




## View Available Upcoming Events

Volunteers can view all of the upcoming events for which they can volunteer in the **Available Upcoming Events** area on the **Event Management** workspace.



# Manage Events, cont.

## Sign Up for Events

You can sign up for events from the **Available Upcoming Events** area on the **Event Management** workspace or from the **Event Details** workspace.

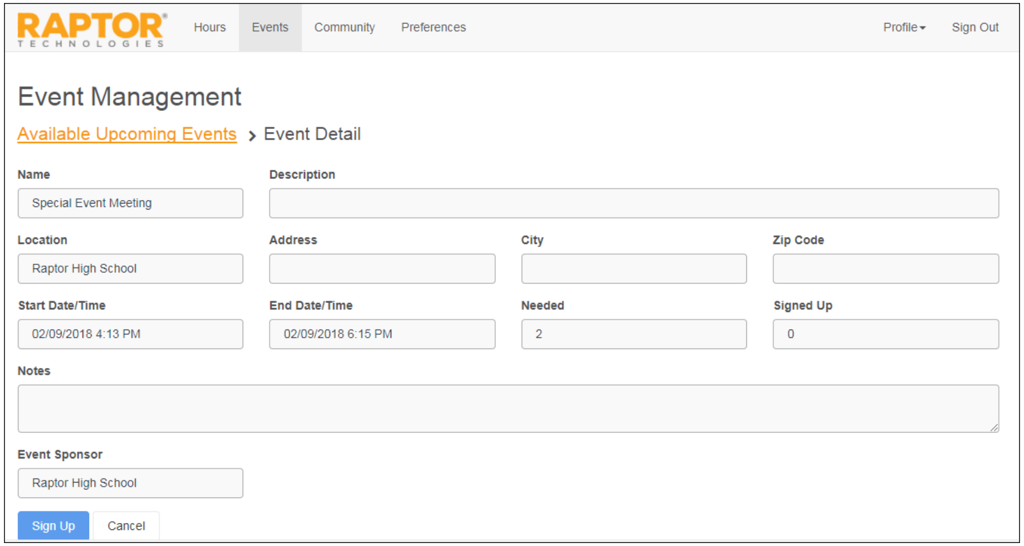
- To sign up for an event from the **Available Upcoming Events** area, click **Sign Up** in the row for the event.
- To sign up for an event from the **Event Details** workspace, click **Details** to open the **Event Details** and then click **Sign Up**.

Once you sign up for an event, that event is moved to the **My Upcoming Events** data grid.

## View Event Details

In the **Available Upcoming Events** area on the **Event Management** workspace, click **Details** for the event you want to view.

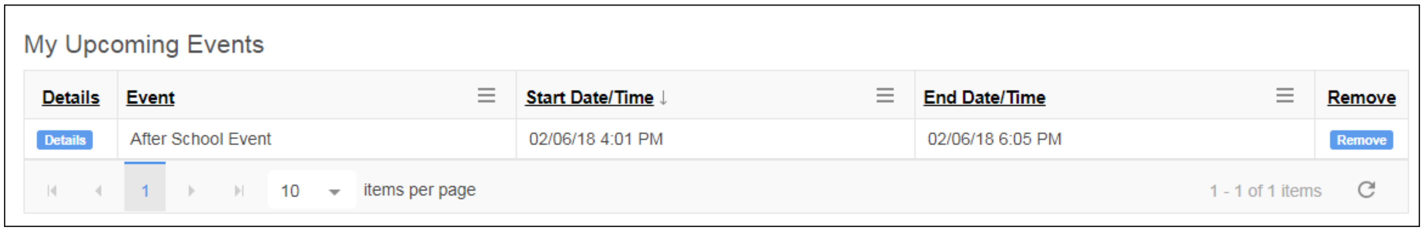
If you want to volunteer for this event, click **Sign Up**.



# Manage Events, cont.

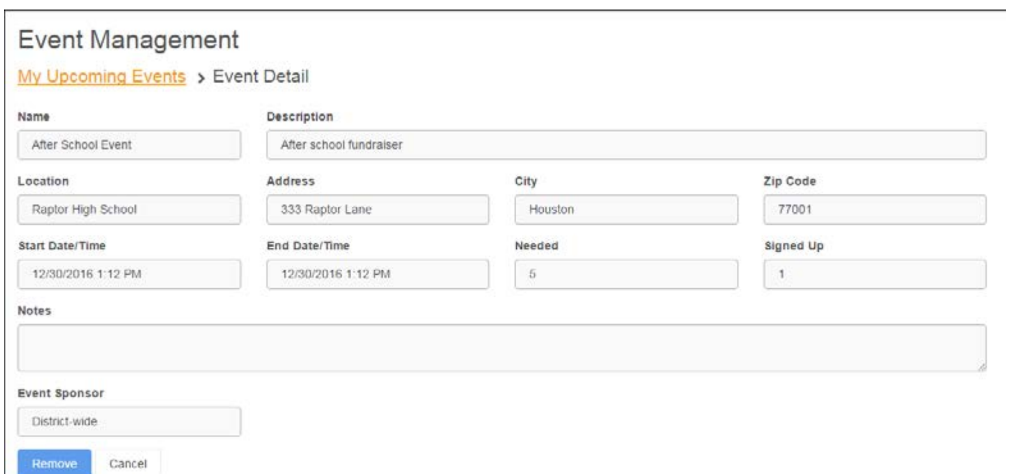
## View Your Upcoming Events

Use the **My Upcoming Events** area on the **Event Management** workspace to view the events that you have already signed up to volunteer. If you can no longer volunteer for the event, click **Remove**.




## View Upcoming Event Details

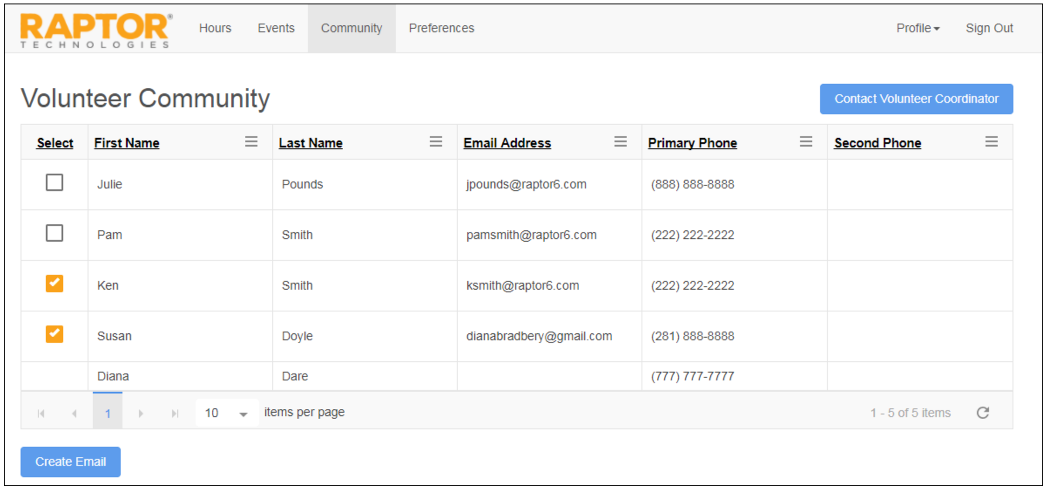
In the **My Upcoming Events** area on the **Event Management** workspace, click **Details** for the event you want to view. If you can no longer volunteer for the event, click **Remove**.




RAPTOR TECHNOLOGIES

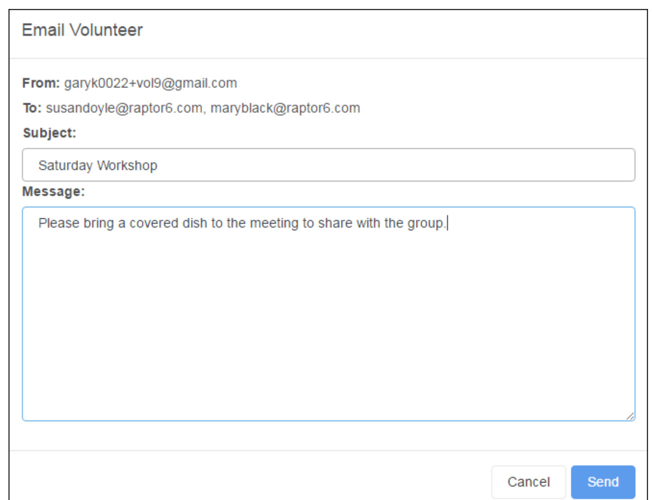
# Email Volunteer Community

Use the **Community** tab on the Volunteer Portal to view a list of volunteers that have allowed other volunteers to view their information, and to send an email to the volunteers.



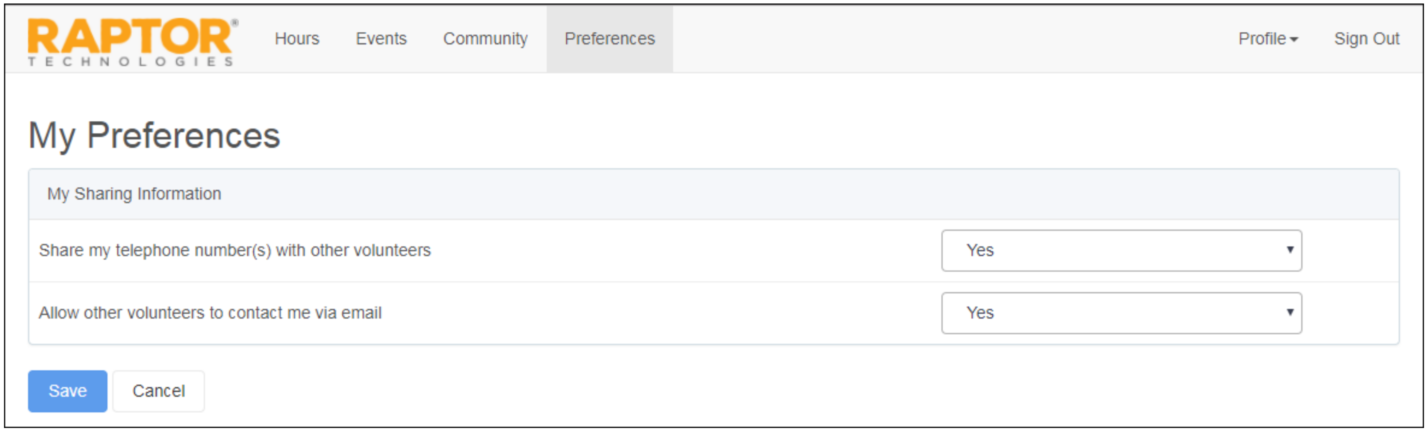

1. On the Volunteer Community workspace, select the check box next to the names of the volunteers to receive the email.
2. Click **Create Email**.
3. Enter the email **Subject** and **Message**, and then click **Send**.

An *Email Successfully Sent* message displays.



# Manage Preferences

Use the **Preferences** tab on the Volunteer Portal to indicate your sharing information preferences.




On the **My Preferences** workspace, specify the following information and then click **Save**:

- Share my telephone number(s) with other volunteers – Select **Yes** or **No**.
- Allow other volunteers to contact me via email – Select **Yes** or **No**.

**Note:** If you select **No** to both settings, your information will not display on the **Community** page for other volunteers to see.

# Contact Us

## Raptor Technologies Support

Email: support@raptortech.com

Call: 877-7RAPTOR (877-772-7867) Option #2