# Volunteer Reporter

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Missoula, Montana USA

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# 1     Welcome

Welcome to the Volunteer Reporter, the most powerful volunteer management database available. It enables you to manage and track volunteers, stations, jobs, placements, hours, reimbursements, donations, and schedules. It reports summary and detailed information about all of this data.
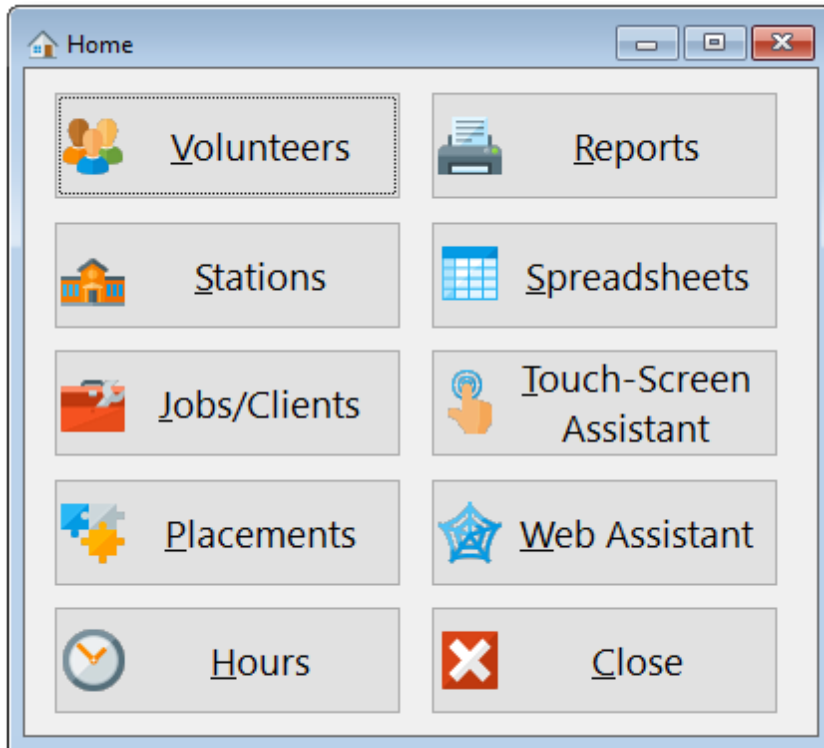


The Volunteer Reporter manages volunteers, and it can do so for a variety of situations and uses. You can use the program simply to keep a listing of your volunteers by name. Or, you can track hours served by each volunteer and easily total and report on the hours served per station, job, or volunteer. The Volunteer Reporter will match volunteers with jobs requiring their unique combination of skills and will keep track of the amount of reimbursement due each volunteer as well as the amount of each volunteer's in-kind contribution. No matter how you use volunteers in your office, the Volunteer Reporter can help you create a useful volunteer file and maintain it in perfect order.

Designed for beginner or advanced computer users, the Volunteer Reporter maximizes your efficiency, giving you time for what matters most -- your volunteers.

# 2 Installation

## 2.1 Installing the Volunteer Reporter

**Welcome**

These step-by-step instructions will lead you through the installation process and also get you started using the Reporter very quickly and easily. Follow these steps whether you are installing for the first time, upgrading, or installing on a network.

We're here to help. Call us at **800-391-9446**.

Before Installing

Installation

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Starting for the First Time

Special Situations / Installation FAQ

## 2.2    Before Installing

**Hardware and Software Requirements**

1. Windows Vista, 7, 8, 10, or 11 (not XP).

2. Any printer.

3. Any network (optional).

**Upgrading Requirements**

When upgrading from an older version of the Reporter:

1. Back up your data.

2. Close the Reporter and Touch-Screen Assistant on all computers.

3. Upgrade all computers at the same time.

**Network Requirements**

When installing on a network:

1. Install the Reporter on every workstation computer.

2. Put the data on one computer that is shared by all the rest.

3. The data computer can also have the Reporter installed on it or not.

4. Every user needs full read/write access to the shared data folder.
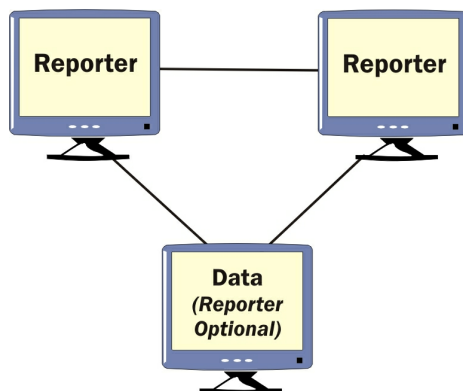
**Install the Reporter on every workstation computer and the data on one shared computer.**

## 2.3    Installation

**Actual Installation Steps**

1. Start the setup program.

2. In most cases, you can use all the standard, default installation settings.

3. If upgrading, the Destination Location will be the same as before and this version will overwrite your existing version of the Reporter.

4. Repeat the installation on every computer that uses the Reporter.

## 2.4    Upgrading

**Upgrading from an Older Version of the Reporter**

1. Start the Reporter.

2. Let it automatically upgrade and reindex your data.

   • Back up your data as part of the upgrading process if you haven't done it already.

## 2.5     Starting for the First Time

**Setting up a Data Set**

The Reporter needs to know where to put your data.
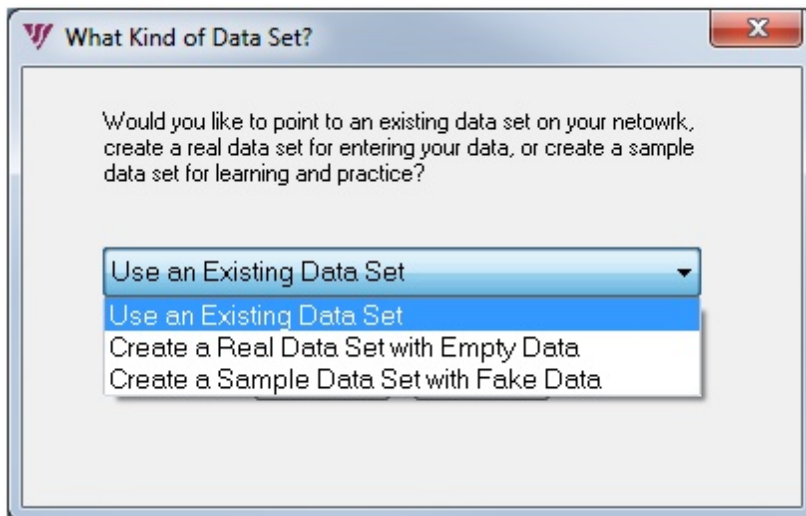


**Data Already Exists**

If you already have the Reporter installed on other computers, add a data set that points to the existing data.

      1. Name the data set "Default" or give it another name.

      2. Point to the network folder containing the existing data with the File Folder button.
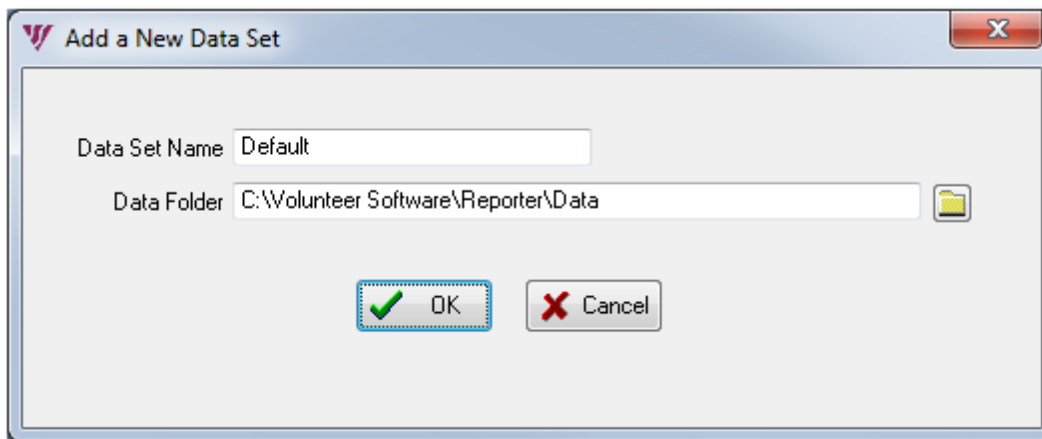


**Brand New Data**

Create a new, empty data set in a location available to everyone else on the network using the Reporter.

1. Name the data set "Default" or give it another name.

2. Enter the data folder location.

- If the Reporter will not be shared, use the default data folder location.

- Point to an existing network folder with the File Folder button  or enter a new folder name that the Reporter will create.

- Every user needs full read/write access to the data folder.

- The Reporter will create empty data files in the data folder.

**Sample Data**

- At any time you can add a sample data set with some fake data available for practice and training.

- Be sure to switch back to your normal data set before entering any real data.

## 2.6    Special Situations / Installation FAQ

**We have three offices in our county. Can we share the Reporter?**

No, you need to buy a separate copy of the Reporter for each office. We generously allow an unlimited number of people in one office to share the Reporter over a network, but require a separate purchase for each office in either a separate building or with a different phone number.

**Do I need to install an older version before the latest version?**

No, even if you never installed the last version, just install the newest version.

**How do I transfer the Reporter from one computer to another?**

Backup your data onto a USB flash drive. Click on **File** | **Backup** to make a backup.

On the new computer, install the Reporter.

Create a new, empty data set, then restore your data from the USB flash drive. Click on **File** | **Restore** to restore the data.

**We just installed a new network. What do we do?**

If you have been using the Reporter on a single computer up until now, it's an easy process to share the data with others over the network.

1. Confirm that the data folder on one computer is available for all others to both read and write to.

2. Install the Reporter on the other workstation computers.

3. Create a data set on each workstation computer pointing to the shared data folder on the hosting computer.

**How do we run the Reporter in a Windows roaming environment?**

Windows has an obscure feature that enables users to roam around the office and use any available computer. Once they log into Windows, they are presented with their own personal desktop, applications, and settings. Very few offices use this option in Windows. Really, if you don't know if you are set up as roaming users, assume you are not because it is very rare. We know of only one office set up as roaming.

However, if you are **absolutely sure** that you are roaming Windows users, you can easily set up the Reporter to work well in that environment. All you need to do is to create a dummy file called "Roaming.txt" and put it into the same folder where the Volunteer Reporter is installed. Only an administrator will be able to create files in this folder, but this only needs to be done once. The file doesn't need to contain anything, it just needs to exist in the same folder with Reporter.exe. Its existence tells the Reporter that this is a Windows roaming environment so that the Reporter will correctly and efficiently handle the roaming users.

# 3    Getting Started

## 3.1    Quick Start

Follow these steps to get going fast.

Click on File, then Preferences.
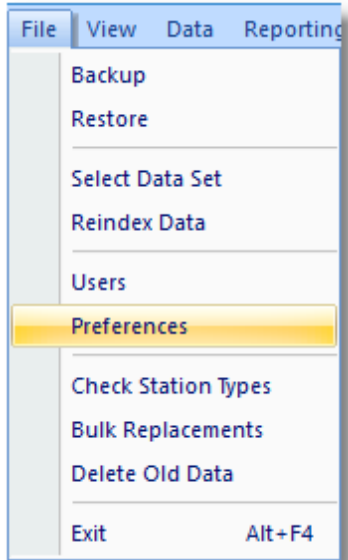


On the Preferences screen, run the Setup Wizard.

On the tabs for Volunteer Fields, Station Fields, and Job Fields in Preferences, turn off unneeded fields, rename any, and move important ones to the top. This is also where you enter available choices for codes and lists like county names, available time slots, and award milestones.

| Volunteer Fields | Station Fields | Job Fields | Donation Fields | Reimbursements | Dat |
|---|---|---|---|---|---|
| | **Displayed Name** | **Use?** | **Default Value** | | **Div** |
| eer No. | Volunteer No. | ✔ | | | ☐ |
| tion | Salutation | ✔ | | | ☐ |
| ame | First Name | ✔ | | | ☐ |
| ame | Last Name | ✔ | | | ☐ |
| | Photo | ✔ | | | ✔ |

Review the **Dates Limits** tab in Preferences. The limits help prevent inaccurate dates, but can limit you when getting started. Loosen them if needed.

On the Email tab in Preferences, select which option works for you.



Enter some data in each section: **Volunteers, Stations, Jobs, Placements**, and **Hours**.



The Reporter enforces a **Dates Hierarchy**:
1.   **Stations** must start before their **Jobs**.
2.   **Jobs** and **Volunteers** must start before their **Placements**.
3.   **Placements** must start before their **Hours**.

## Volunteers



Enter volunteer data on the Profile tab. The default **Codes**, **Skills**, **Groups**, **Awards**, and **Availability** codes are entered under Preferences. On the **Placements** tab add a job placement for every job at which the volunteers serves, but not until you enter the stations and jobs. On the **Hours** tab you will enter hours once you have placements entered. Use the **Donations** tab to track donations made by volunteers. Enter notes about the volunteer on the **Comments** tab.

## Stations

| Profile | Jobs/Clients | Volunteers | Hours | Donations | Comments | Documents |
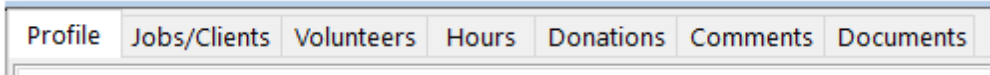
Stations are the "parents" of Jobs. Example: A library is a station, "Shelving Books" and "Reference Desk" are its jobs. Every station needs at least one job.

## Jobs/Clients

| Profile | Volunteers | Hours | Schedules | Description | Impact | Comments | Documents |
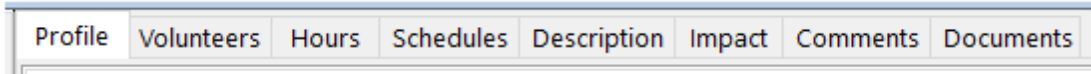
A job or client belongs to a Station and can be either an individual client or a group job. Most of the information is optional including the **Job Description** and **Impact** fields.

## Placements

Add a placement for every job at which a volunteer serves. Back date it if you're going to enter hours in the past for it. You can add placements from either the Volunteer, Job/Clients, or Placements screens.

Volunteer **Bevis, Wanda**
Volunteer's Starting Date **09/24/2007**

Valid Date Range **On or after 09/24/2007**
Placement Starting Date [ / / ]
Primary Placement ☐ Mark as Primary

## Hours

Add hours from either the Volunteer, Job/Clients, Station, or Hours screen. Pick a date and fill in the hours on the grid. It's quick and efficient.

| Volunteer | Job/Client | Station | Date | Hours | Minutes |
|---|---|---|---|---|---|
| Henderson, Marie | Head Start Helper | MPHS Head Start Progra | 11/30/2015 | | |
| Henry, Eileen | Head Start Helper | MPHS Head Start Progra | 11/30/2015 | | |
| Jenkins, Kate | Head Start Helper | MPHS Head Start Progra | 11/30/2015 | 21 | 0 |
| Kretzer, Florence | Head Start Helper | MPHS Head Start Progra | 11/30/2015 | | |
| Lawson, Eleanor | Head Start Helper | MPHS Head Start Progra | 11/30/2015 | | |
| Mauter, Bettnia | Head Start Helper | MPHS Head Start Progra | 11/30/2015 | 9 | 0 |
| M. F.ll. D.th. | H. .l St.t H.l. | MPHS H. .l St.t P. | 11/30/2015 | | |

## Reports

Start running Reports as soon as you have entered some data. They are simple, yet powerful tools.
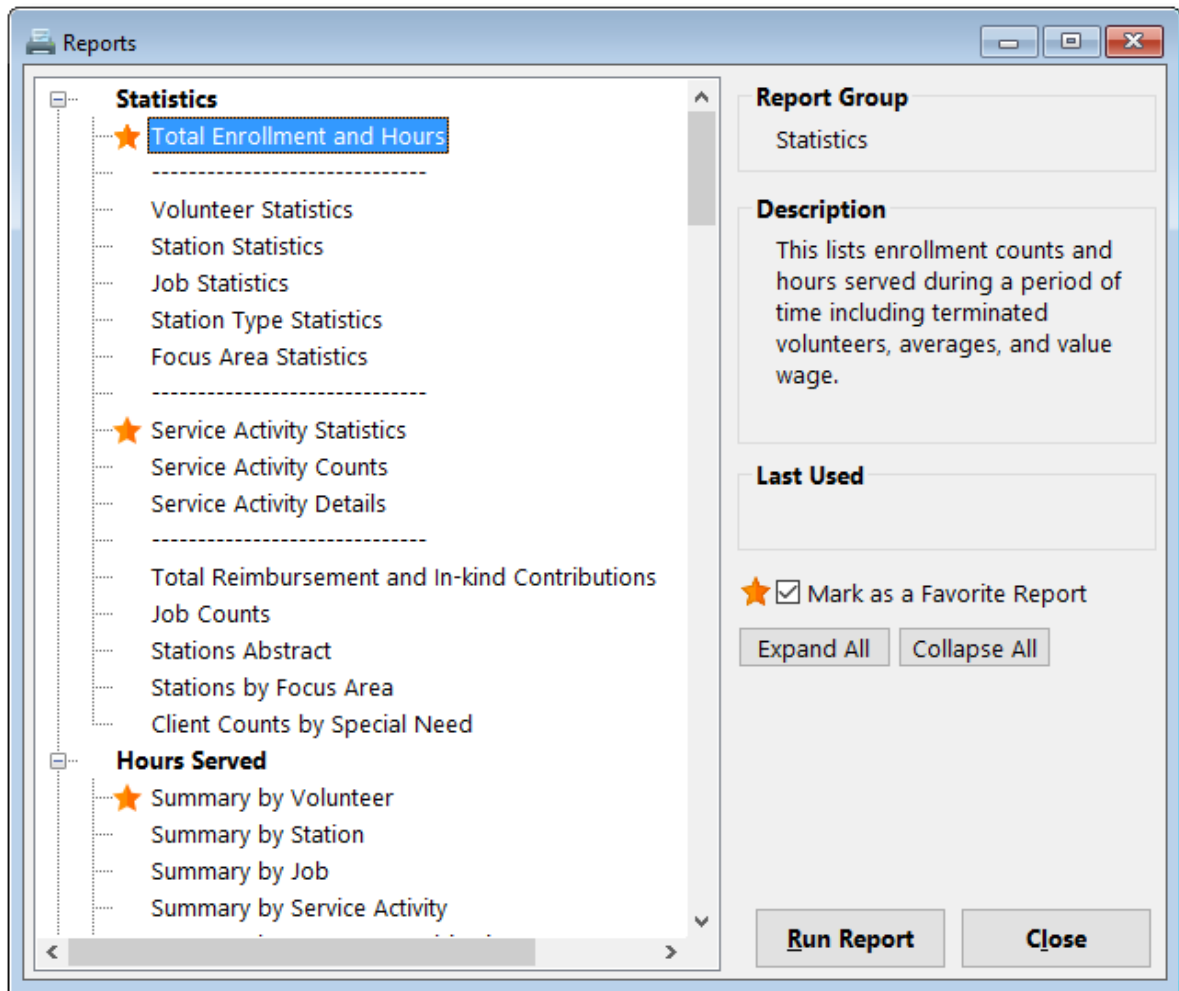
## Spreadsheets

Spreadsheets harness the power of Excel to offer more flexibility in displaying your data.

| D | E | F | G | H |
|---|---|---|---|---|
| **Salute** | **First Name** | **Last Name** | **Mailing Name** | **1st Address** |
| | Roberta | Abernathy | Roberta Abernathy | 1007 S. Madison |
| Mr. | Harry | Adkins | Mr. and Mrs. Harry Adkins | 333 Beckwith Ave |
| Ms. | Mary | Ahonen | Ms. Mary Ahonen | P. O. Box 140 |

## Filters

Filters limit the records included on any report or spreadsheet. Review the sample filters we've included and then create your own. Use only one or two limitations per filter.

| Volunteer Limits | Station Limits | Job Limits | Placement Limits | Donation Limits |
|---|---|---|---|---|

| **Name** | **Value** |
|---|---|
| Filter Name | Over 55 |

**Web Assistant**

Subscribe to the Web Assistant to enable your volunteers to enter hours from home and apply on-line. It provides seamless integration between the Internet and the Reporter.



**Sample Data**

Switch to our Sample Data Set for training and practice. Don't forget to switch back to the **Default** data set before adding real data.
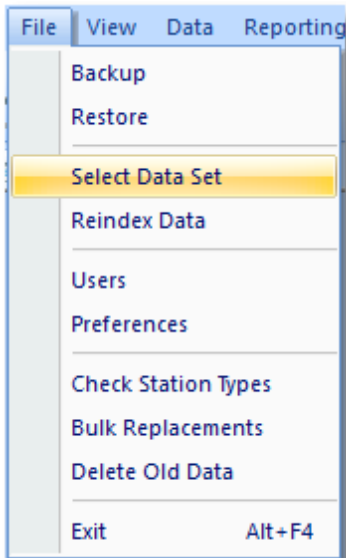


**Backup your Data**

Backup your data daily. It's quick and easy and can be a life saver.
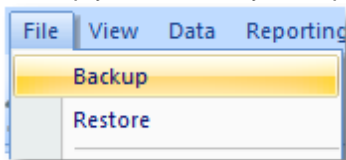


**Additional Training**

Read tutorials on our web site to learn the basics fast.
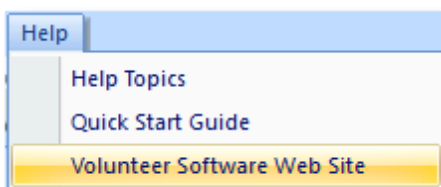
## 3.2     Sample Data

We've included sample data for you to play with. To access the sample data, click on **File** | **Select Data Set** and select the sample data set. If it hasn't yet been  installed, simply click the **Add** button and create a new sample data set. Use it to learn how to use the Reporter. Have fun and experiment -- you can't break anything. Don't forget to switch back to the **Default** data set before adding real data.
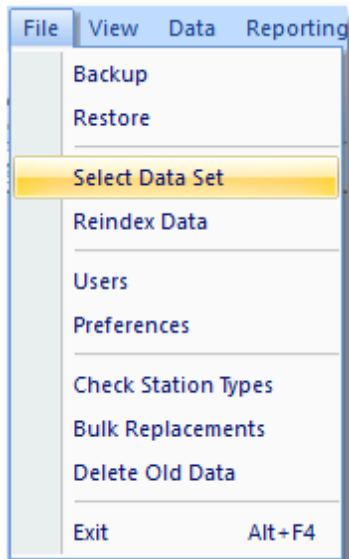


Add some more volunteers and print some reports like:

Total Enrollment and Hours

Hours Served, Summary by Volunteer

Mailing labels

# 4 Introduction

## 4.1 Program Description

The Volunteer Reporter represents a new approach to tracking volunteers for efficient management and accurate reporting. This software goes beyond simple mailing list managers, letting you quickly answer questions about how volunteers are serving in your community that have been difficult, if not impossible, to answer before.

The Volunteer Reporter helps you match volunteers' skills with jobs' needs, enables you to quickly and easily keep track of the number of hours served and track the amount of reimbursement due each volunteer.

While working with the sample data, you'll enter your volunteers, noting which skills each volunteer has, and then enter your stations and each station's jobs so that we can keep track of how many hours are served by each volunteer at each job.

Using your mouse and standard Windows features like copy and paste, entering volunteers, stations, and jobs into the Volunteer Reporter is easy and efficient. Entering hours on a monthly or quarterly basis is automated as much as it can be so that you'll quickly get to where you can enter hours for a dozen volunteers in just a few minutes.

## 4.2 Overview

The Volunteer Reporter helps you keep track of how much time volunteers are working at various jobs in your organization or community. The overall organization of this program starts with stations. A station is an organization that needs volunteers. A station is broken down into one or many jobs. For example, your local hospital is a station that has three jobs: gift shop, information desk, and patient transport. The station coordinator who signed the memorandum of understanding for the entire hospital might also be the same person that supervises the three jobs, or the job supervisor for each job might be a different person.

Since each job is associated with a station, we must enter the information about the station into the program before we can enter information about each of its jobs. Similarly, we must enter information about the job before we can enter hours worked by a volunteer at that job. Since it is easy to jump from one part of the program to another in order to add new stations, jobs, and volunteers, we can start with just a few of each and add more as needed. The program tries to help by making it easy to add new records when needed.

There are several different dates associated with stations, jobs, and volunteers. Each station has the date that its memorandum of understanding was signed. Each job for that station has a date that they requested volunteers. Volunteers have a starting date when they first started volunteering at any job. There is another starting date associated with every volunteer placement at a particular job.

There are also ending and termination dates for placements, volunteers, jobs, and stations. When a volunteer is no longer working at a particular job, enter an ending date for that single job placement. When a volunteer is no longer volunteering at any jobs, enter a termination date and cause for termination for that volunteer. When you are no longer placing any volunteers at a job, enter a termination date for that job and, finally, when a station is no longer being served by you, enter a termination date for it.

The reason we enter ending and termination dates for volunteers, jobs, and stations instead of deleting

them is that we have an overall goal of keeping track of hours served by all volunteers at all jobs for a long time. So as long as there are some hours on file referring to a volunteer, the program won't let you delete that volunteer although you may enter an ending date at any time. If they have an ending date, we can exclude them from most reports so that only the total hours served by them appear on the appropriate reports.

In order to completely delete a volunteer or a job, first delete all hours referring to the volunteer or job. You can either delete these hours individually on the hours screen or delete them as a group by using the file utility to delete old data. To delete a station first delete all of its jobs.

Another use of the Volunteer Reporter is to match volunteers with jobs requiring some unique volunteer skills. For every volunteer we can mark which skills the volunteer possesses and for each job we can request volunteers possessing those unique skills. The Volunteer Reporter will help us match jobs and volunteers by showing possible matches on either the volunteer or job screens.

We can also quickly keep track of schedules for all of our volunteers. Once we have a basic schedule for a volunteer entered, we can easily reproduce it week after week with just one keystroke. These schedules allow us to print a variety of schedules for each volunteer and job.

## 4.3    Accuracy

The Reporter includes hundreds of built-in checks and balances to assure that your data is always accurate and secure. These checks and balances are all automatic so that you don't have to keep track of them yourself. Normally they stay out of the way and you won't run across them, but they pop up as helpful reminders whenever the Reporter senses that the data doesn't fit quite right.

Several simple examples are when the Reporter prevents a person's sex as being anything other than M or F and when the Reporter won't let you delete a location code that is still used to describe where volunteers live.

## 4.4    Records and Fields

If you haven't previously worked with a database program, two words used in the Volunteer Reporter might be new to you: "record" and "field." A record is a collection of information such as a person's name and address. Five names and addresses would be five records.

A field is an individual data item within a record such as a person's first name or a person's last name. One record consists of a group of related fields of information treated as a unit. Each record can consist of many fields, some of which the Volunteer Reporter requires to store and access a volunteer's record, and some of which are optional (such as the volunteer's birth date).

You won't have to deal much with fields and records as such, but the program and this manual will refer to them from time to time. It's important to understand the idea that each volunteer will be represented in the program by a record, and each record contains a number of fields with information you've entered about each of your volunteers.

## 4.5    Date Fields

Throughout the program all date fields have four digits available for the year although you only have to enter the last two digits of the year and the program fills in the rest. There is also a preference setting that enables you to change this behavior.

All dates are in the form specified under **Regional and Language Options** on the **Windows Control Panel**. For example, if you have your computer set to show dates in the YYYY-MM-DD format, the Reporter follows that setting.

### Date Checking
The Volunteer Reporter tries to help you avoid entering incorrect data. When you are getting started, this can be frustrating if it prevents you from back dating some of your data. To override this, click on **File | Preferences** and then the **Date Limits** tab. You might consider increasing the back dating length from the default 90 and 180 days for the time being. Don't forget to return here after you finish entering your older data.

### Dates Hierarchy
Keep in mind the certain dates you enter will restrict other dates. For example, if a volunteer didn't start until today, the Reporter won't let you enter hours for that volunteer for last month. The dates hierarchy is that stations must start before their jobs, jobs and volunteers must start before their placements, and placements must start before any hours are served at that placement.

### Popup Calendar
Every date field in the Reporter includes a popup calendar. When you click on any date field, a calendar button appears next to the field. Click on that button to pop-up a calendar to use for entering the date.
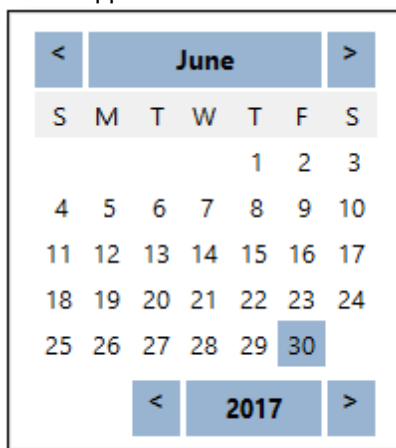


A volunteer's birth date is the only exception that doesn't have a pop-up calendar. It is not practical to enter birth dates by using a pop-up calendar because birth dates are so many years in the past.

### Shortcuts
When editing date fields you can use the following shortcut keystrokes.

| Next day | **+** (plus key) |
|---|---|
| Previous day | **–** (minus key) |
| **T**oday | **T** |
| First day of the **W**eek | **W** |
| Last day of the wee**K** | **K** |
| First day of the **M**onth | **M** |
| Last day of the mont**H** | **H** |
| First day of the **Y**ear | **Y** |
| Last day of the yea**R** | **R** |

# 4.6    Coding Records

Reference codes are very important to the Volunteer Reporter. The Volunteer Reporter stores a lot of data for each volunteer, station, and job in the form of codes. All of these codes are user-definable.

This use of codes ensures accurate data entry. If we didn't use codes, one person might have an ethnicity of "White" while another would be "Caucasian". All codes are selected from drop down lists.

In addition to defining what any codes mean, you can also define what types of codes to use. This means you can use codes for any purpose. You can reassign the name of the coded field and put in any codes you want. For example, if you won't use "Past Employer" codes, you can reassign it to "Education Level" or some other type of information you want to keep on every volunteer.

There are also additional user-defined fields for any other dates, text, or numbers that you want to keep for each volunteer, job, or station. All of these fields are available when filtering records.

# 4.7    Jumping

You can quickly jump from one section of the Reporter to another by double-clicking. It's very intuitive and the following illustration explains it.
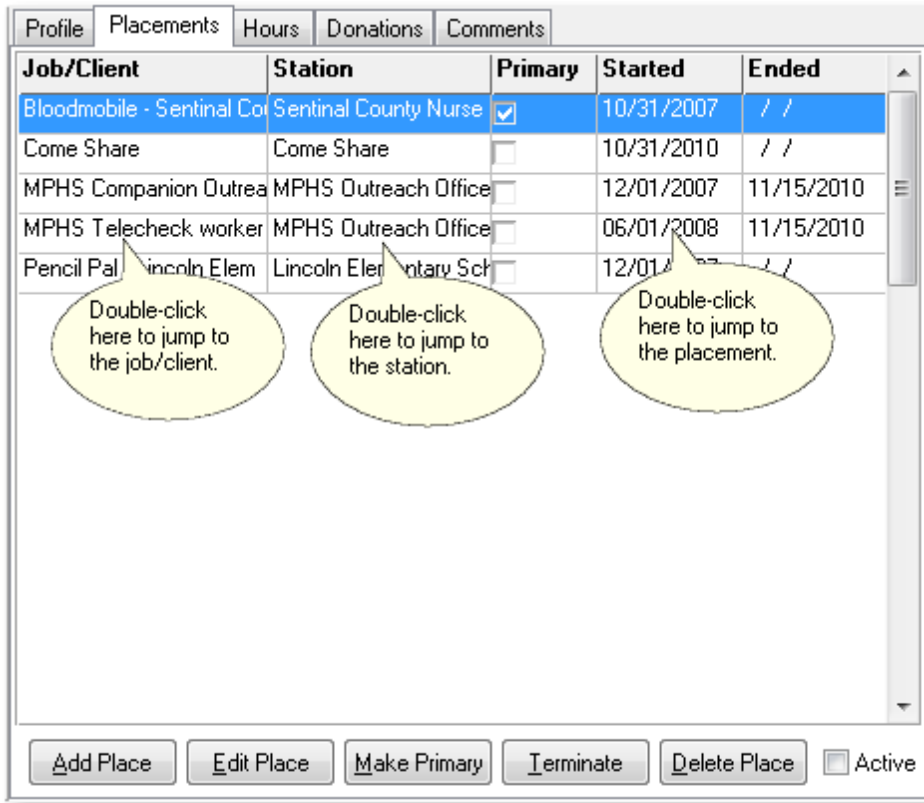
## 4.8 Popup Menus

**Right click** on most grids to popup a custom menu of the actions available to you.
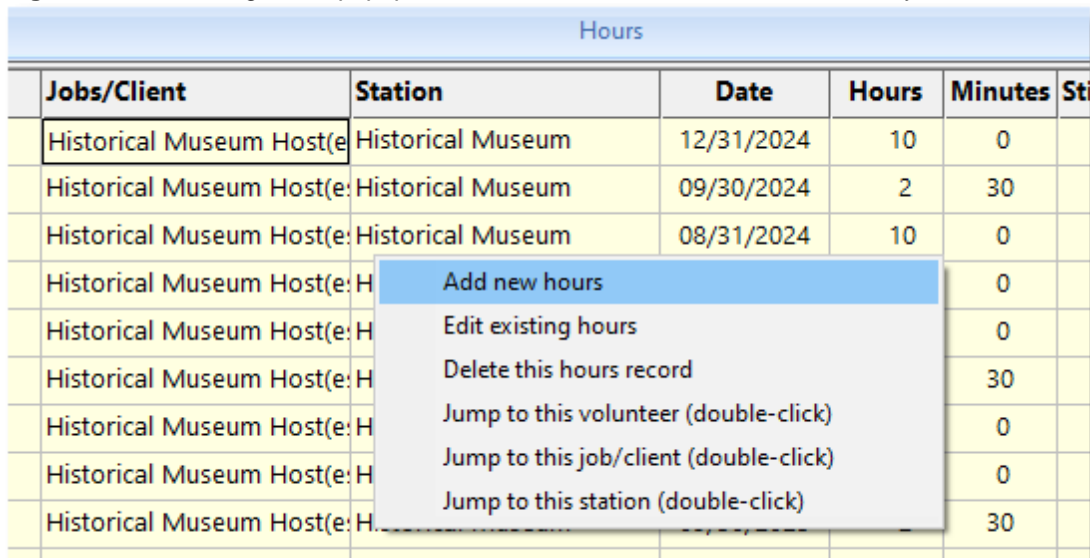
The **right click** popup menus are different and unique to the current grid.



You don't have to use popup menus because everything on the menu is available by clicking on buttons. They are just there to help make your work a little more efficient.



## 4.9    Filtering Records

The Reporter has a powerful filtering feature which enables you to limit which records you view and print. Normally, all of the records are printed on every report, but with filters you can view and print just subsets of your data.

An example would be a filter that only included volunteers living in a particular area. Using that filter would only print those volunteers on any report.

Filters are reusable and can be shared across a network by anyone using the Reporter.

## 4.10 Deleting vs. Terminating

Don't confuse terminating a volunteer, station, or job with deleting it from the database. If you terminate a volunteer when they are no longer working for you, all the previous hours they have worked in the past are still included in your volunteer statistics, but when you delete a volunteer, all their past hours are gone, not to be counted. Caution: once deleted, a record cannot be retrieved.

The program prevents you from deleting a volunteer who has current placements or hours on file. If you try to delete a volunteer with hours, the program will tell you that other files still refer to this volunteer. You must delete the hours and placements before deleting the volunteer. The same applies to stations and jobs.

## 4.11 Active vs. Inactive

On the data entry screens (Volunteers, Stations, Jobs, Hours) you have the option of listing All, Active, or Inactive records. If you choose All you'll see all records, but if choose Active you'll see only those records without a termination date. Choosing Inactive will show just records with a termination date.
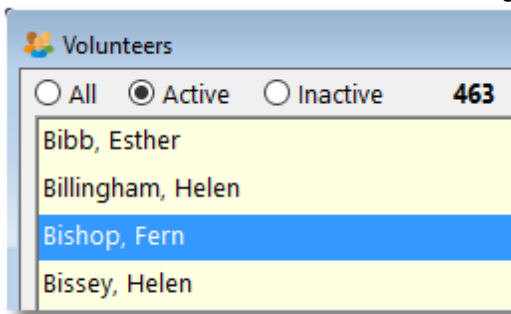


In this case, an "active" volunteer is anyone without a termination date, no matter how many hours the person has served.

## 4.12 Live Update

The Reporter will use the Internet to keep up to date with new patches that we provide. Click on **Help | Live Update** to check for any new, free updates. It's simple and quick.

Help

Help Topics
Quick Start Guide
Volunteer Software Web Site
Reference Manual (pdf)
What's New in Version 6.4

Live Update

About the Volunteer Reporter
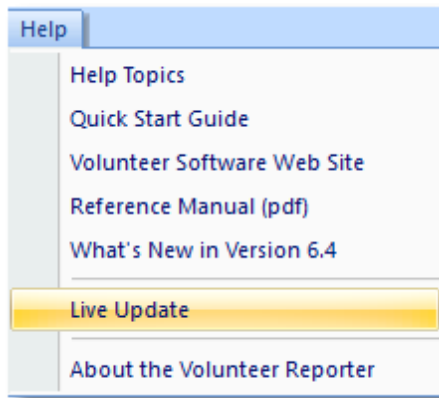
In Preferences, you can tell the Reporter to automatically check for live updates every few days.

## 4.13   Choosing a Numbering Scheme

The first field for each record in volunteers, stations, and jobs is the record number. This is always a required field and must be unique for every record. The Volunteer Reporter automatically supplies them and prevents duplicates.

The record number is required by the Volunteer Reporter in order to keep all the records straight.

Some people try to design numbers that mean something about the record, but we suggest you don't. There are many other fields designed to categorize and track records that do a much better job of it than trying to use the record number.

We suggest you start with record number "000001" for volunteers, stations, and jobs.

It makes no difference whether all record numbers are in sequence or whether there are gaps in the numbers.

You can change an individual record number at any time. The Volunteer Reporter automatically advances them from the last one entered.

## 4.14   Changing Colors

Colors can be for more than just cosmetic appearance. Some people might need high contrast colors to see the screen well while the rest of us can use good color choices to make the Reporter easier to use in subtle ways. For example, the list of volunteers is highlighted whenever it has focus. This helps prevent losing the cursor as you add and edit volunteers.

The Reporter does not use custom colors, but instead uses the color settings from the display properties of your computer. Every computer has color settings that you can change. To change your computer's colors right click on any empty spot of the desktop and select Personalize. You can either change individual colors one at a time or pick a different theme.

Inside the Reporter you can also set a visual theme from the View menu. A theme consists of a set of colors, shading, and other subtleties of how windows and icons are displayed. Pick one you like.
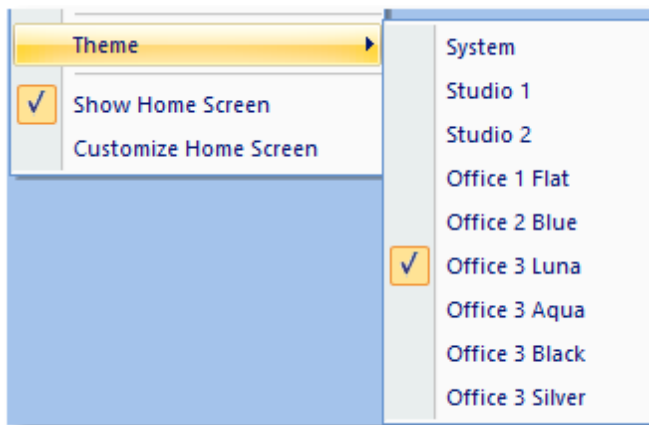
## 4.15 Copy and Paste

The Reporter includes several ways to copy and paste your data which can make your work easier and more productive.

**Speed Copy**
**Right-Click** on almost any field in order to quickly copy the field into the Windows Clipboard.
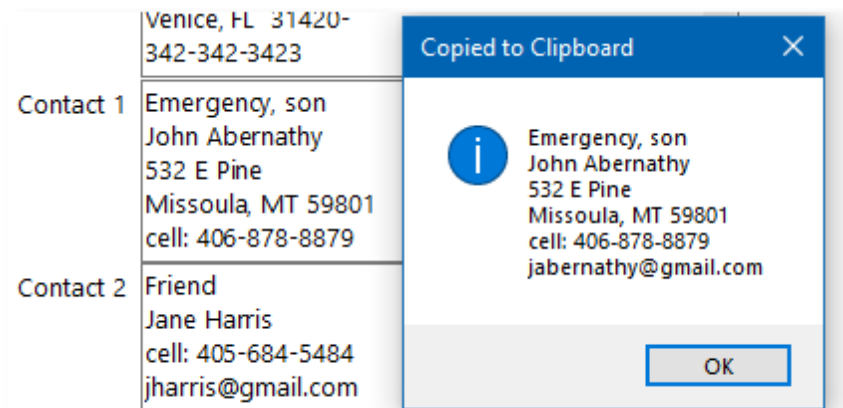


**Cut, Copy, Paste**
You can select text with your mouse and then cut or copy it as in all Windows programs. You can either select cut, copy, or paste from the edit menu, from the toolbar, or by using the standard Windows shortcut keystrokes of Ctrl-X, Ctrl-C, and Ctrl-V.

**Copy Name/Address**
This enables you to copy an entire name and address of a volunteer at once so that you can then paste it into your word processor. Simply select the volunteer record you want to copy and then select "Copy Name/Address" from the edit menu or the toolbar.

After the name and address are copied into the Windows clipboard, switch to your word processor and paste it into a letter.

**Copy Record / Paste All Fields / Paste One Field**
These three commands work together to make up a Copy/Paste system to ease data entry. Used together they enable you to quickly copy and repeat information from one record to another. You can, for example, quickly repeat the same city, state, and zip in a number of similar records without having to type them every time.

You can select these commands either from the edit menu or the toolbar.

Click on "Copy Record" when you are on a record that contains information you want to copy into another record. When you "Copy Record" all the information from that record is automatically copied into an internal "clipboard" for later pasting into another record. This happens without any message or notification.

"Paste All Fields" will paste all fields into another record. For example, if you start adding a new record and click on "Paste All Fields", all the information from the previously copied record will automatically be pasted into this new record and the two records will be identical.

"Paste One Field" is similar, but it only pastes one field at a time. You would use it, for example, when you want to paste just the city, state, and zip into a new record.

## 4.16    Email

Each volunteer, station, and job can have an email address. To start an email message to a single person, click on **Edit | Start Email Message** from the top menu or click on the **Email button** on the toolbar.

You can also send an email to a group of volunteers, stations, or jobs all at one time by going through the Reports menu and clicking on Email Messages. Select a filter to limit which records to include and then click on **Count**. After getting a count of the records with email addresses, click on **Prepare**.
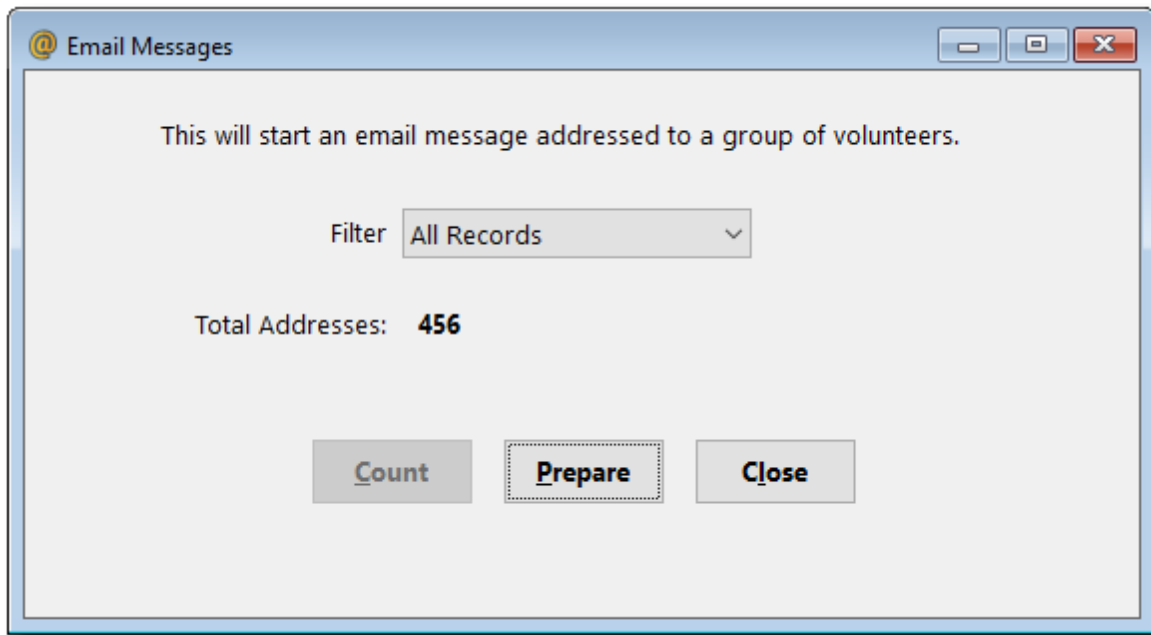
When you click Prepare, the Reporter will ask where to paste the filtered email addresses.
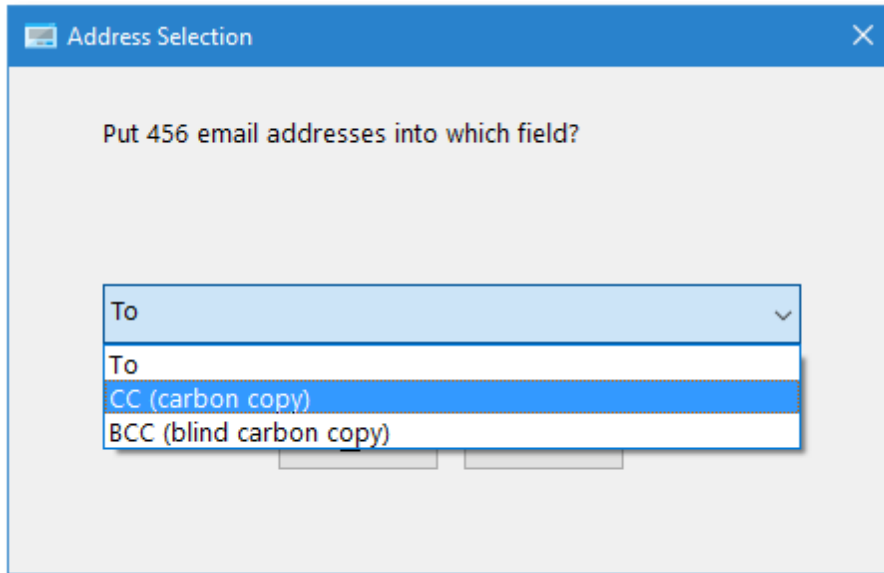


You  may want to paste the addresses into the BCC field (blind carbon copy) instead of the TO field. Doing that insures that each recipient will not see all of the other addresses at the top of their email. If your email program won't send the message without an address in the TO field, put your own address in the TO field.

Not all email programs normally show the BCC field.

A potential problem is that some people set up filters to automatically delete any email messages not specifically addressed to them.

Your Internet Service Providers might not allow you to send an email addressed to hundreds of people in which case you'll have to cut and paste the addresses into several email messages.

## 4.17   Startup Options

When you first start the Reporter, you can press one of several F keys quickly to force the Reporter to perform a particular task or enter a troubleshooting mode. Normally, you won't need to use any of these options unless you're having trouble and we ask you to try one or the other. When the Volunteer Reporter splash screen appears, you have about two seconds to press one of these keys.

**F3**  This will force the Reporter to immediately re-index your data. It would be the same as starting the Reporter, then going to Preferences and choosing to re-index. It doesn't hurt to re-index your data, it just takes time. Normally, your data only needs to be re-indexed when it is upgraded to a newer version.

**F5**  This will start the Reporter in a "minimum startup mode" which bypasses many system checks. For example, normally the Reporter checks to make sure that all of the files needed to operate are present and accounted for. If you use this startup option, that check (and dozens more) won't happen. If you can't start the Reporter because every time it tells you that some file is missing or folder is locked, you can use this option to bypass that message and get into the Reporter. It won't make the problem go away, just allow you in so you can fix the problem.

**F7** The Reporter knows where your data is located on the network by looking in a particular table, datasets.dbf. If that table becomes corrupted, the Reporter can't start. This is very rare. Pressing F7 forces the Reporter to assume that the datasets table is corrupted and to remake it. It will try to recover your data's folder location from the existing table, but if the existing table is really corrupted, it won't be able to and you will have to point the Reporter to the location of your data on the network. In any case, this has nothing to do with your actual data, but only knowing the location of your data.

**F9** Pressing F9 forces the Reporter to upgrade your data from a previous version of the Reporter again. Normally, your data is upgraded just once when installing a new version of the Reporter. It is unusual to have to upgrade your data a second time, only in the case of the upgrading process failing before completion. Even then, the Reporter will know that it didn't complete the process and start it over. It won't ever hurt to upgrade your data more than once, it will just be a waste of time if you don't need to.

# 5    Volunteers

This section of the program enables you to add information about new volunteers and edit the information. Besides the basic demographic information about each volunteer, you can also manage their placements, hours, and donations from here.



**Finding a Volunteer**
The easiest way to find a person is to start typing the person's last name in the "Find" field in the bottom left corner of the screen. Use the **Up** and **Down** arrows of your keyboard to scroll through the list quickly. To scroll even faster, try the **Home**, **End**, **Page Up** and **Page Down** keys, too. They are often easier to use for scrolling than the mouse.



If you don't know someone's last name, click on the **Find** button which pops open a large grid of your

volunteers. In this grid, every column is "searchable". For example, to find someone by their first name, click on the column heading **1st Name**. That sorts the list by their first name. Then type their name into the "Find" field. You can just as easily search by city, zip, telephone, or email address. Just click on any column heading to sort the list by that column.

| Volunteer No. | First Name | Last Name | First Address | City | ST | Zip | Home P |
|---|---|---|---|---|---|---|---|
| V00001 | Sheila | Bevis | Box 34A | East Missoula | MT | 59858 | 618-665 |
| V00441 | Sherry | Llewellyn | 335 E. Middle St. | East Missoula | MT | 59837 | 217-873 |
| V00371 | Shirley | Clemmons | 808 W. Strain | East Missoula | MT | 59851 | 217-728 |
| V00336 | Shirley | Phillips | 1107 S. Main, Apt. #1 | East Missoula | MT | 59851 | 217-728 |
| V00226 | Shirley | Powers | 321 S. Polk | East Missoula | MT | 59851 | 217-728 |
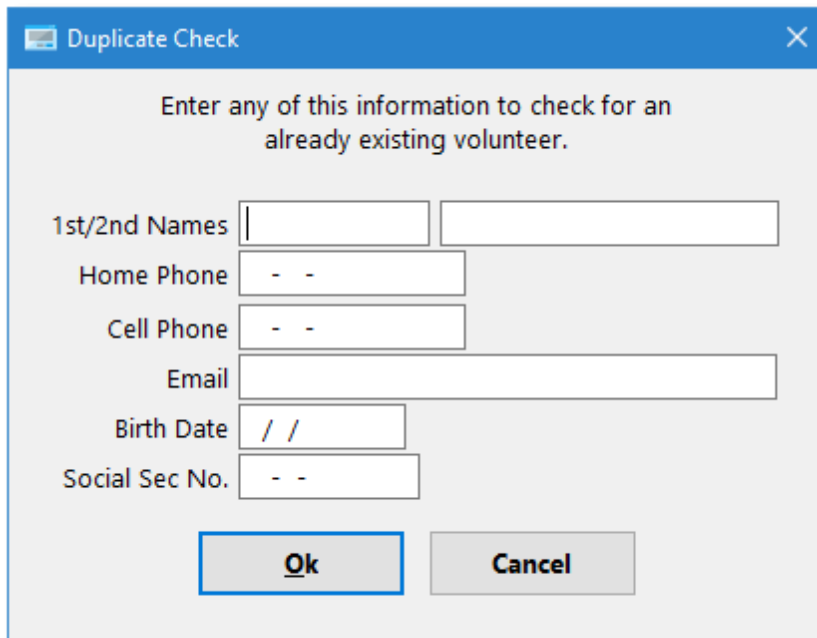
*Find a Volunteer (Active Only). Click on a column heading to sort the list. Use the find field to locate a record. Scroll right to see more columns.*

**Active vs. Inactive**
In the upper left corner of the screen are three buttons: All, Active, and Inactive. Active are just volunteers without a termination date, inactive are volunteers with a termination date, and all includes both. When you terminate a volunteer he/she is moved to the Inactive list in order to avoid cluttering the screen.

**Adding a Volunteer**
Click the Add button to enter a new volunteer's information. The volunteer number is automatically entered as well as any default values you previously set in Preferences. All other fields are blank waiting for you to enter data. For more efficiency, press tab to move to the next field without having to take your hands off the keyboard.

**Duplicate Check**
When you click on the Add button to add a new volunteer, the Reporter pops up a "Duplicate Check" screen. On this screen, enter any or all of the information and then click on the Ok button. The Reporter will check through existing records (both active and terminated) to show you all possible matches.

If you enter just a First or Last name, the Reporter might show you a lot of potential matches. On the other hand, if you enter a phone number, the Reporter might show you a spouse already on file with the same phone. Don't worry about wasting your time with double entry, the Reporter uses the information on the Dupe Check screen to pre-fill the new volunteer's record.

**Editing a Volunteer**
Edit a volunteer to change some piece of information.

**Terminate Volunteer**
Terminate a volunteer who is no longer volunteering at any job by clicking on the Terminate button and entering a termination date and optional cause. When you terminate a volunteer, the Reporter also terminates all of the placements on the same date. Terminating a volunteer does not affect their hours that have already been entered which is the main reason we terminate volunteers instead of deleting them. Whether a volunteer is active or terminated, the hours that they have served will always be reported.

**Restarting a Volunteer**
You can restart terminated volunteers shown on the Inactive list by clicking on the Restart button. Enter a date they restarted and choose with a check mark whether to restart their job placements or not. As always, their hours are unaffected whether they are active or inactive.

**Deleting a Volunteer**
You cannot delete a volunteer for whom there are hours worked on file. You must first delete all hours and placements worked by that volunteer. Usually you don't delete volunteers, but terminate them instead.

**Photos**

Attaching photos to a volunteer's record is simple and easy. To load a photo, either drag it onto the photo location or click the green plus sign button. You don't have to first click the Edit button before adding a photo to a volunteer.

*Photo Editing Buttons*
There are six photo editing buttons above each photo. Instead of using the buttons, you can right-click on a photo to pop up the same photo editing choices.

Load Photo - Pick the correct photo for this volunteer. You can also drag the photo onto the volunteer's photo rectangle.

Rotate Left - spin the photo counter clockwise.

Rotate Right - spin the photo clockwise.

Crop Photo - Select a portrait from a larger photo containing extra background.

Delete Photo - Remove a photo from a volunteer's record.

Export Photo - Save the volunteer's photo as a separate file in order to use it for some other purpose.

More Photos - Keep up to six photos per volunteer, labeling each, and choosing which is the default to be shown.

*Hints for taking good photos*
Take a portrait instead of a landscape photo. That's vertical, not horizontal.
Get very close with the camera. Fill the frame with just a head shot.

*Photo Resolution*
Cameras and phones can take very high resolution photos. Higher resolutions are important for printing enlargements, but for this application low resolution photos work just as well. The Reporter automatically reduces the resolution of any photo down to 640 x 480 pixels in order to save storage space on your computer.

**Turn Off Fields**
The Reporter includes more fields than you need. We do this so that everyone can keep whatever information they require about their volunteers.  This would be terribly confusing if we didn't enable you to turn off fields that you don't need. In Preferences, you can turn off fields that you don't use. You can also rearrange the order in which the fields are displayed and throw in horizontal lines to organize the screen.

**Set Default Values**
On the Field Lists screen you can pre-set default values to use when adding new volunteers.

**Required Fields**
The only required fields are number, name, and starting date. You can leave all the rest blank. In Preferences check any other fields as also being required.

**Fields**
In Preferences turn off unneeded fields, rename any fields, and rearrange the order.

| Field | Description |
|-------|-------------|
| Volunteer No. | Required and must be unique. |
| Salutation | Ms., Mrs., Mr., etc. Optional. |
| First and Last Names | Required. |
| Photo | A digital photo of the volunteer. |
| Group of Volunteers | Is this a group of people volunteering together? |
| Group Name | The group's name like "Scout Troop 35". Required if this is a group. |
| Mailing Name | This is the specific name you want to print on each volunteer's mailing label. For example, for a volunteer named Robert Jones, you can enter a mailing name of Bob Jones or enter Mr. & Mrs. for one of a pair of volunteers. This name is only used on mailing labels and in merge files. |
| First Address | Street address. |
| Second Address | This optional field will not print on labels if it is blank. If this field is used, the post office delivers mail to this address. |
| City | Don't include a comma after the city because the Reporter does it for you automatically on labels and addresses. |
| State | The state is automatically capitalized. |
| Zip | Zip codes or postal codes. |
| Home Phone | Volunteer's home phone number. |
| Work Phone | Volunteer's work phone number and extension. |
| Cell Phone | Cell or mobile phone. |
| Phone 4 | An additional phone. Change the name to something needed like Fax. |
| Phone 5 | An additional phone. |
| Other Phone Type | The description of some other, unique phone for this volunteer like "Friend Mary's", "Front Desk", or "Message Number". |
| Other Phone | Phone number of unique phone. |
| Email | An email address. You can automatically start an email message to this person by clicking on the Email button on the toolbar or by clicking on "Edit | Start Email Message" on the top menu. |
| Starting Date | The date when the person first signed up to volunteer. Required. |
| Terminated | The date when the person stopped volunteering at any jobs. You can restart a volunteer as many times as needed. |
| Termination Cause | The reason that the volunteer stopped volunteering. |
| Years and Months of Service | The amount of time between the starting date and today not counting any time the volunteer was terminated. This is calculated automatically. |
| Start/Stop Dates | Showing all starting and stopping dates for volunteers that have been terminated and restarted more than once, snowbirds for example. |
| Birth Date and Age | If you know only a partial birth date for a volunteer, enter just the amount you know. For example, you can enter the month and day, but leave the year blank. Age is calculated automatically. |
| Sex | Male(M) or Female(F). |
| Gender | Male, Female, Another Gender, Prefer Not to Say, Unknown. Set the possible codes in Preferences. |
| Ethnicity | Hispanic or Not Hispanic. These follow standard federal guidelines. Set the possible codes in Preferences. |

| Field | Description |
|---|---|
| Racial Group | White, Black, etc. Set the possible codes in Preferences. |
| Veteran | Is the volunteer a veteran? |
| Has Disability | Does the volunteer have a disability? |
| Drivers License | Any combination of letters or numbers. For example you can enter "111-11-1111" or "123 AB 456 (ID)". |
| Driver's License Expiration | When does their driver's license expire? |
| Social Security Number | In the US, this follows the form: 123-12-1234. |
| Lifetime Pledges | The total amount this person has pledged to date. This is kept up to date by the Reporter automatically, but you can edit it if need be. |
| Lifetime Donations | The total amount this person has donated to date. This is kept up to date by the Reporter automatically, but you can edit it if need be. |
| Lifetime Hours | The total number of hours this person has served to date. This is kept up to date by the Reporter automatically, but you can edit it if need be. |
| Wants Reimbursement | If unchecked, all monies claimed by the volunteer for reimbursement will be counted by the program as in kind contributions. You can override this when adding hours records. |
| Needs Timesheet | If unchecked, no timesheet will be printed for this volunteer. |
| Needs Mailing Label | For each volunteer, you can note whether he/she needs a mailing label. This enables you to avoid sending duplicate mailings to couples at the same address. When used in combination with the volunteer mailing name, you can send just one mailing to a couple and have it addressed to Mr. & Mrs. |
| Stipended Volunteer | Whether this person can receive stipends for volunteer work performed. In order for stipends to be calculated when entering hours, both the volunteer must be marked as being a stipended volunteer and the job just be checked as a stipend job. |
| Turned away as over income | Was the person excluded from volunteering because he/she was over set income guidelines? This probably only applies if you are running a Senior Companion or Foster Grandparent Program. |
| Turned away as under 60 | Was the person excluded from volunteering because he/she was under the age of 60? This probably only applies if you are running a Senior Companion or Foster Grandparent Program. |
| Senior Companion Leader (SCL) | Is this person a Senior Companion Leader? |
| Senior Companion Recruited by SCL | Is this a Senior Companion volunteer recruited by a Senior Companion Leader? |
| Community Volunteer Recruited by SCL | Is this a Community Volunteer recruited by a Senior Companion Leader? |
| Check Marks 1-10 | Change the name of these to use to keep track of yes/no information about your volunteers like whether they have signed a photo release or are married. |
| Codes Fields 1-20 | Use these for data that you pick off a list. For example, rename one to be County and enter a list of nearby counties. Then you can assign each volunteer to one of them. When you first install the Reporter, codes 1-8 have default names, but you can change any of them. In order to change the codes and what they mean, go to Preferences. |

| Field | Description |
|---|---|
| Text Fields 1-10 | Use these to enter unique information like the spouse's name or an ID number. |
| Date Fields 1-10 | Use these to keep specific dates for volunteers like when an orientation session needs to be renewed. |
| Number Fields 1-10 | Store numeric data about volunteer like number of children. |
| Skills | Abilities or interests that the volunteer possesses or wants to do. Set up the list of available skills in Preferences and then select as many as needed for each volunteer. |
| Groups | Use this as a way to keep track of people other than volunteers. For example, you can set up several groups like "Volunteer", "Advisory Board", and "Media", and then assign each person to one or more of them. |
| Awards | Awards are typically given to volunteers who have served a certain number of hours or years, but they can be used for any other type of award, too. We have set up a few common awards types, but feel free to modify this list in Preferences.<br><br>Notice how we have grouped awards by first the type of award followed by the value of the award as in "Hour, 100". They ensures that all of the hourly awards will be grouped together alphabetically. We suggest you also use blank spaces after the comma to keep lower numbers appearing before larger numbers. By using spaces to right justify the values, it keeps "10000" from coming before "2000".<br><br>For each award, you can also enter the date that the volunteer received it. |
| Available Times | Available Times are when a volunteer is available for volunteering. Once again we have supplied some common times for you, but edit the list to suit your needs with in Preferences. Notice how we have numbered the days of the week in order to have them listed clearly. If we didn't list the days as "Day 1, Monday" and "Day 5, Friday", Friday would be listed at the top of the list alphabetically before Monday. |
| Lists 1-5 | Use these for data where you need to select one or many for each volunteer. Examples are degrees that the volunteer possess or geographical areas where they are willing to travel. |
| Lists with Dates 1-5 | Use this type of list when you want to keep track of a date along with an item off a list. An example is a list of training classes and the date when the volunteer completed each one. |
| Multiple Addresses | Each volunteer can have up to nine mailing addresses. The first address is usually their home address while others might be work addresses or seasonal addresses.<br><br>When you first add a new volunteer, the address you enter for them is automatically entered as their "Home" address. You can rename the address description to something other than "Home" although it will always default to "Home" with every new volunteer you add.<br><br>For those volunteers with more than one address, you can indicate which address is to be used for mailings. Click on the little dot indicating "Mail to this address". When you switch which address to use for mailings, that address automatically is shown above. Any editing changes you make to |

| Field | Description |
|---|---|
| | the address here is reflected above and vice versa. |
| Contacts | You can keep track of up to nine additional contacts for each volunteer such as emergency contacts, parents, beneficiaries, or physicians. You can choose to keep track of different types of contacts for each volunteer. For each of these contacts, you can enter their address, two phone numbers, and an email address. |
| Touch-Screen Assistant PIN | If your volunteers use the Touch-Screen Assistant to sign in, you assign their PIN here or on the separate Touch-Screen Assistant screen. |
| Web Assistant Username | If your volunteers enter their hours from home using the Web Assistant, this is their username. |
| Web Assistant Password | Web Assistant password. |
| Added | Date this record was added. Set by the program and never changes. |
| Revised | Date this record was last revised. Updated automatically every time this record is edited. |
| Comment | This is some space for you to write down whatever is important to know about this volunteer that is not included elsewhere. You can type as much as you want. The comment is always shown on a separate tab. |
| Documents | Attach separate documents to a volunteer. For example, keep a test result for future reference. Documents can be any electronic form including pdf's, jpg's, and docx's. |

**Placements**

You can manage a volunteer's placements either from here or from the separate Placements window. A placement is a job or client for which a volunteer serves. You cannot enter hours for a volunteer until that volunteer first has a placement. If you choose just **Active** placements, only those without an ending date will be shown.

| Profile | Placements | Hours | Donations | Schedules | Comments | Documents |

| Jobs/Client | Station | Primary | Started | Ended | |
|---|---|---|---|---|---|
| Bloodmobile - Sentinal | Sentinal County Nurs | ☑ | 10/31/2007 | 09/13/2016 | |
| Come Share | Come Share | ☐ | 10/31/2010 | / / | |
| MPHS Companion Out | MPHS Outreach Offi | ☐ | 12/01/2007 | 12/31/2015 | |
| MPHS Telecheck worke | MPHS Outreach Offi | ☐ | 06/01/2008 | 11/15/2010 | |
| Pencil Pal - Lincoln Eler | Lincoln Elementary S | ☐ | 12/01/2007 | / / | |

**Add** **Edit/Move** **Primary** **Restart** **Delete** ☐ Active Only

To add a new placement, click the **Add** button. Pick an existing job/client off the list and enter a starting date for the placement. **Edit** the starting or ending date if they are incorrect. **Move** a placement to another job/client if if was incorrectly assigned. Designate one placement per volunteer to be the primary placement by double clicking on the primary checkbox or clicking on the **Primary** button. Learn more about primary placements on the Placements screen. **Terminate** a placement if a volunteer is no longer serving there and **restart** placements if the volunteer starts up there again. Typically, you would only **delete** placements that were mistakenly entered in the first place.

**Hours**

Like placements, you can manage them from here or from the separate Hours screen. It works the same from either screen with all the same capabilities and features. It is explained in more detail in Hours, but basically you can sort the hours by clicking on column headings, add new hours for all jobs/clients on a single date, edit existing hours, delete mistakes, or move hours to a different job. If you choose just **Active** hours, only those at placements without an ending date will be shown.

| Jobs/Client | Station | Date | Hours | Mi |
|---|---|---|---|---|
| ▶ Bloodmobile - Sentinal Co | Sentinal County Nurse | 02/14/2013 | 2 | |
| Bloodmobile - Sentinal Co | Sentinal County Nurse | 11/30/2010 | 14 | |
| Bloodmobile - Sentinal Co | Sentinal County Nurse | 10/31/2007 | 27 | |
| Come Share | Come Share | 05/20/2011 | 1 | |
| Come Share | Come Share | 11/30/2010 | 10 | |
| Come Share | Come Share | 10/31/2010 | 27 | |
| MPHS Companion Outrea | MPHS Outreach Office | 12/31/2015 | 18 | |
| MPHS Companion Outrea | MPHS Outreach Office | 11/30/2015 | 11 | |
| MPHS Companion Outrea | MPHS Outreach Office | 10/31/2015 | 22 | |
| MPHS Companion Outrea | MPHS Outreach Office | 09/30/2015 | 20 | |
| MPHS Companion Outrea | MPHS Outreach Office | 08/31/2015 | 15 | |
| MPHS Companion Outrea | MPHS Outreach Office | 07/31/2015 | 16 | |
| MPHS Companion Outrea | MPHS Outreach Office | 01/31/2015 | 12 | |

Tabs: Profile | Placements | **Hours** | Donations | Schedules | Comments | Documents

Buttons: **Add** | **Edit** | **Delete** | **Move** | ☐ Active Only

**Donations**

These are donations made by the volunteer and explained in detail in Donations.

| Profile | Placements | Hours | Donations | Schedules | Comments | Documents |

| **Date** | |
|---|---|
| 03/15/2005 | |
| 04/01/2006 | |

Type | Monetary
Amount $ | 100.00
Payment Type | Check
Non-Monetary |
Gift Received |
Net Amount $ | 100.00
Source | Mailing 12
Matching |
In Memory of |
Earmarked for | General Fund
Anonymous ☐
Receipt Needed ☐

Check No.
5495
$ | 0.0
$ | 0.0

Receipt Sent | 03/15/2005
Added | 11/05/2007
Revised | / /

Comment

| **Add** | **Edit** | **Delete** | **Print** |

**Schedules**
You can schedules volunteers at their job placements ahead of time. Click on a single day to see more detail and to add or edit schedules. Duplicate individual schedules or a week at a time. Learn more about scheduling at Schedules.

| Profile | Placements | Hours | Donations | Schedules | Comments | Documents |
|---|---|---|---|---|---|---|

| Sun | Mon | Tue | Wed | Thu | Fri | Sat |
|---|---|---|---|---|---|---|
| Jan 29 | 30 | 31<br>09:00a Ame | Feb 1 | 2<br>09:00a Ame | 3 | 4 |
| 5 | 6 | 7<br>09:00a Ame | 8 | 9<br>09:00a Ame | 10 | 11 |
| 12 | 13 | 14<br>09:00a Ame | 15 | 16<br>09:00a Ame | 17 | 18 |
| 19 | 20 | 21<br>09:00a Ame | 22 | 23<br>09:00a Ame | 24 | 25 |
| 26 | 27 | 28<br>09:00a Ame | Mar 1 | 2<br>09:00a Ame | 3 | 4 |

‹    **February 2017**    ›

**Duplicate**    **Delete**    **Print**

**Comments**

On the Comments tab, you can write as much as you need to about a volunteer. These notes can be useful to keep track of information that doesn't fit anywhere else and doesn't need to be searched. You can set the access of comments by each individual user to **Full**, **Read-Only**, or **None** under **File | Users**.

| Profile | Placements | Hours | Donations | Schedules | Comments | Documents |

07/29/2009 - Ed works every Saturday evening at the "Hub" playing music for listening and dancing in addition to cleaning the hall before and after each event. He does repair work at the "Hub" and is active in Civil Defense projects. He is a volunteer fireman and provides entertainment for nursing homes, senior citizen activities, reunions and serves as a Red Cross volunteer.

09/15/2010 - He's leaving for a winter in Florida, will call on when he returns in the spring.

04/01/2011 - He's back and ready to go!

03/15/2012 - He has expressed interest in serving on the board when we next have an opening. I think he'd be great. KH.

[ **Top** ] [ **Bottom** ] [ **Edit** ]

The Top and Bottom buttons will reposition the comments, but you won't notice their effect unless you have comments that are longer than one screen. While editing comments you can click on the **Add Date** button to insert today's date at the current cursor's location.

**Documents**
The documents tab is a list of documents attached to the volunteer. You can attach any sort of document. It can be a document you have written like a Word document, a scanned copy of a paper document, a photo, or anything else. Whatever you need to keep with the volunteer. **Add** a document by giving it a descriptive name and selecting the actual document. With a checkmark when adding, you can choose to keep the original or to delete it which has the effect of moving it from the original location to storage with your volunteer's data. You can also drag a document onto the volunteer's record. Click on **Export** to email it or send a copy of it to any location on your computer. **Open** the document either with the Open button or by double clicking on it.

| Profile | Placements | Hours | Donations | Schedules | Comments | **Documents** |

| **Descriptive Name** | **Actual File Name** |
|---|---|
| Background Check Results | Anderson, Barbara.pdf |
| Group Photo Lunch 2017 | IMG_0008.JPG |
| Intake Form | Intake Form.pdf |
| Monthly Review | Monthly Review.docx |

<u>A</u>dd    <u>E</u>dit Name    <u>D</u>elete    <u>E</u>xport    <u>O</u>pen

**Print**
Use the Print button to print a variety of reports for this one volunteer including a Volunteer Match report that lists all possible jobs for this volunteer based upon the volunteer's skills.

# 6    Stations

This section of the program enables you to add and edit information about stations and the jobs associated with each station. One station might have several jobs.



**Finding a Station**

The easiest way to find a station is to start typing its name in the "Find" field in the bottom left corner of the screen. Use the **Up** and **Down** arrows of your keyboard to scroll through the list quickly. To scroll even faster, try the **Home**, **End**, **Page Up** and **Page Down** keys, too. They are often easier to use for scrolling than the mouse.



If you don't know the name of a station, click on the **Find** button which pops open a large grid of your stations. In this grid, every column is "searchable". For example, to find a station by the first name of the supervisor, click on the column heading **1st Name**. That sorts the list by their first name. Then type their name into the "Find" field. You can just as easily search by city, zip, telephone, or email address. Just

click on any column heading to sort the list by that column.



**Active vs. Inactive**

In the upper left corner of the screen are three buttons: All, Active, and Inactive. Active are just stations without a termination date, inactive are stations with a termination date, and all includes both. When you terminate a station it is moved to the Inactive list in order to avoid cluttering the screen.

**Add a Station**

Click the Add button to enter a new station. The stations number is automatically entered as well as any default values you previously set in Preferences. All other fields are blank waiting for you to enter data. For more efficiency, press tab to move to the next field without having to take your hands off the keyboard.

**Edit a Station**

Edit a station to change any piece of information.

**Update Jobs**

When a station's address or contact information changes, use this button to pass those changes onto the jobs or clients associated with this station.
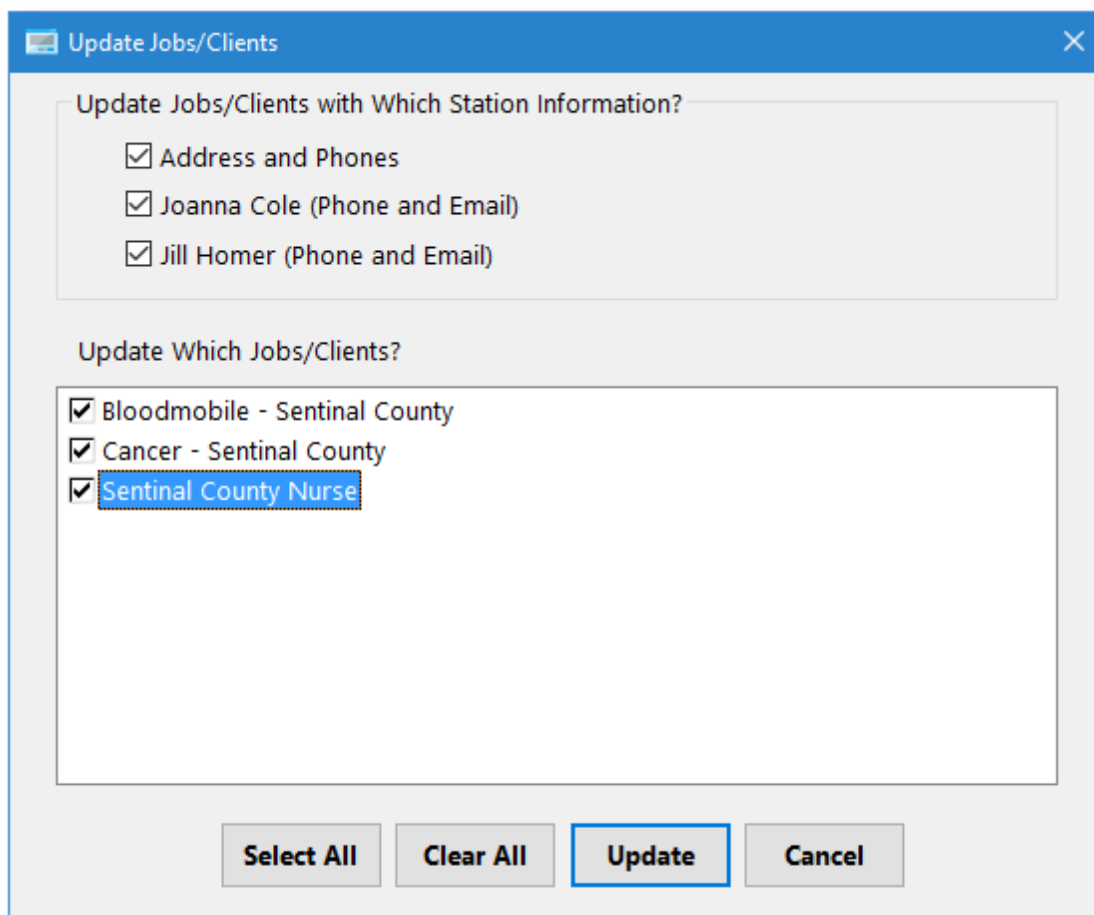
### Terminate a Station

Terminate a station that is no longer taking volunteers at any of its jobs by clicking on the Terminate button and entering a termination date. When you terminate a station, the program also terminates all of the station's jobs and all volunteer placements at those jobs. Terminating a station does not affect the hours that have already been served at that station which is the main reason we terminate stations instead of deleting them. Whether a station is active or terminated, the hours served at it will always be reported.

### Restart a Station

You can restart terminated stations shown on the Inactive list by clicking on the Restart button. You can choose whether to restart their jobs and placements or not. As always, their hours are unaffected whether they are active or inactive.

### Delete a Station

You cannot delete a station for which there are jobs on file. You must first delete all jobs for the station. Normally, you will terminate the station instead of deleting it.

### Turn Off Fields

The Reporter includes more fields than you need. We do this so that everyone can keep whatever information they require about their stations.  This would be terribly confusing if we didn't enable you to turn off fields that you don't need. In Preferences, you can turn off fields that you don't use. You can also rearrange the order in which the fields are displayed and throw in horizontal lines to organize the screen.

**Set Default Values**
On the Field Lists screen you can pre-set default values to use when adding new stations.

**Required Fields**
The only required fields are Station Number, Station Name, and the date the Memorandum of Understanding was originally signed. You can leave all the rest blank. In Preferences check any other fields as also being required.

**Fields**
In Preferences turn off unneeded fields, rename any fields, and rearrange the order.

| Field | Description |
|---|---|
| Station No. | Required and must be unique. |
| Station Name | The name of the station. Required. |
| First Address | Street address. |
| Second Address | This optional field will not print on labels if it is blank. If this field is used, the post office delivers mail to this address. |
| City | Don't include a comma after the city because the Reporter does it for you automatically on labels and addresses. |
| State | The state is automatically capitalized. |
| Zip | Zip codes or postal codes. |
| Phone | Telephone number of the station. Include an extension at the end if needed. |
| Fax | Fax phone number. |
| Other Phone Type | The description of some other, unique phone for this station like "Alternate" or "Pager". |
| Other Phone | Phone number of unique phone. |
| Web Address | Internet web address of the station. |
| Contact 1 Salutation | Ms., Mrs., Mr., etc. |
| Contact 1 First Name | First name of the contact. |
| Contact 1 Last Name | Second name of the contact. |
| Contact 1 Title | Title of the contact like "Executive Director" or "Volunteer Coordinator". |
| Contact 1 Email | Email address of the contact. You can automatically start an email message to this person by clicking on the Email button on the toolbar or by clicking on "Edit | Start Email Message" on the top menu. |
| Contact1 Cell Phone | Cell phone of the contact. |
| Contact 2 | A second possible contact for the station. |
| MoU Originally Signed | Date the memorandum of understanding was first signed. |
| MoU Last Renewed | Date the memorandum of understanding was last renewed. |
| MoU Next Renewal | Date the memorandum of understanding needs to be renewed next. |

| Field | Description |
|---|---|
| Terminated | The date when the station no longer accepted volunteers. |
| Station Type | An official type used by RSVP's. |
| Health Care Facility | Is this station a health care facility? This is used on the Stations Profile report and counted on the Station Statistics report. |
| Faith-Based Station | Is this a faith-based station? This is used on the Stations Profile report and counted on the Station Statistics report. |
| Disaster Services Station | Is this a disaster services station? This is used on the Stations Profile report and counted on the Station Statistics report. |
| Needs Mailing Label | For each station, you can note whether it needs a mailing label. This enables you to avoid sending mailings to certain stations that should not receive them. |
| Check Marks 1-10 | Change the name of these to use to keep track of yes/no information about your stations like whether the station accepts disabled volunteers. |
| Codes Fields 1-20 | Use these for data that you pick off a list. For example, rename one to be County and enter a list of nearby counties. Then you can assign each station to one of them. In order to change the codes and what they mean, go to Preferences. |
| Text Fields 1-10 | Use these to enter unique information like the name of another contact. |
| Date Fields 1-10 | Use these to keep specific dates for stations like when an training session needs to be renewed. |
| Number Fields 1-10 | Store numeric data about the station. |
| Lists 1-5 | Use these for data where you need to select one or many for each station. An example is various awards for years of cooperation, like 1, 5, and 10 year awards. A station will collect more than one of these over time. |
| Lists with Dates 1-5 | Use this type of list when you want to keep track of a date along with an item off a list. An example is a list of inspections and the date when each was completed for the station. |
| Web Assistant Username | If you allow your station supervisors to enter hours for volunteers using the Web Assistant, this is the username. |
| Web Assistant Password | Web Assistant password. |
| Added | Date this record was added. Set by the program and never changes. |
| Revised | Date this record was last revised. Updated automatically every time this record is edited. |
| Comment | This is some space for you to write down whatever is important to know about this station that is not included elsewhere. You can type as much as you want. The comment is always shown on a separate tab. |
| Documents | Attach separate documents to a station. For example, keep a Memorandum of Understanding. Documents can be any electronic form including pdf's, jpg's, and docx's. |

**Extend the MoU Next Renewal Date**
When editing the MoU Last Renewed date, you can automatically move the Next Renewal date ahead 1, 2 or 3 years.

| MoU Originally Signed | 05/01/2005 | | | |
|---|---|---|---|---|
| MoU Last Renewed | 05/01/2015 | | | |
| MoU Next Renewal | 05/01/2017 | +1 | +2 | +3 |

**Jobs/Clients**

Each station can have an unlimited number of jobs. You can add new ones here or open existing ones to get more detail. If you choose to show only active ones with the check mark, any with an ending date will not be shown.

| Profile | Jobs/Clients | Volunteers | Hours | Donations | Comments | Documents |
|---|---|---|---|---|---|---|

| Jobs/Client | Started | Ended |
|---|---|---|
| Dispatch - Lake County | 12/01/2007 | / / |
| Transportation - Lake County | 07/01/2007 | / / |

**Add Job/Client**    **Open Job/Client**    ☐ Active Only

**Volunteers**

All volunteers at any of the station's jobs are listed here. If you click on the column headings "Volunteer", "Job/Client", or "Started", you will sort the list in order by the information in that column. Click on **Active Only** to show only those without an ending date.

| Profile | Jobs/Clients | Volunteers | Hours | Donations | Comments | Documents |

| Volunteer | Jobs/Client | Primary | Started | Ended | |
|-----------|-------------|---------|---------|-------|---|
| Angel, Ottis | Dispatch - Lake Count | ☐ | 05/19/2011 | / / | |
| Barnett, Alice | Transportation - Lake | ☐ | 08/01/2008 | / / | |
| Bedingfield, Mary | Dispatch - Lake Count | ☐ | 12/01/2007 | / / | |
| Bedingfield, Mary | Transportation - Lake | ☐ | 12/01/2007 | / / | |
| Bradford, Charlotte | Transportation - Lake | ☐ | 03/31/2008 | 12/31/2014 | |
| Chandler, Lea Ann | Transportation - Lake | ☐ | 12/01/2007 | / / | |
| Chandler, Norma | Transportation - Lake | ☐ | 03/31/2008 | / / | |
| Coats, Mary R. | Transportation - Lake | ☐ | 01/01/2008 | / / | |
| Heard, Evelyn | Transportation - Lake | ☐ | 12/01/2007 | / / | |
| Jones, Melba | Dispatch - Lake Count | ☐ | 02/01/2008 | / / | |
| Jones, Melba | Transportation - Lake | ☐ | 02/28/2008 | / / | |
| Kelley, Faye | Transportation - Lake | ☐ | 01/01/2008 | / / | |
| Kilburn, Ethel | Transportation - Lake | ☐ | 12/01/2007 | / / | |

**Open Volunteer**   **Open Placement**   ☐ Active Only

**Hours**
You can manage hours from here or from the separate Hours screen. It works the same from either screen with all the same capabilities and features. It is explained in more detail in Hours, but basically you can sort the hours by clicking on column headings, add new hours for all of a station's volunteers on a single date, edit existing hours, or delete mistakes. If you choose just **Active** hours, only those at placements without an ending date will be shown.

| Profile | Jobs/Clients | Volunteers | Hours | Donations | Comments | Documents |
|---------|--------------|------------|-------|-----------|----------|-----------|

| Volunteer | Jobs/Client | Date | Hours | Mi ^ |
|-----------|-------------|------|-------|------|
| ► Angel, Ottis | Dispatch - Lake County | 05/19/2011 | 1 | |
| Barnett, Alice | Transportation - Lake Cou | 08/31/2015 | 4 | |
| Barnett, Alice | Transportation - Lake Cou | 08/31/2014 | 4 | |
| Barnett, Alice | Transportation - Lake Cou | 08/31/2009 | 4 | |
| Barnett, Alice | Transportation - Lake Cou | 08/31/2008 | 4 | |
| Bedingfield, Mary | Dispatch - Lake County | 12/31/2013 | 5 | |
| Bedingfield, Mary | Transportation - Lake Cou | 12/31/2013 | 5 | |
| Chandler, Lea Ann | Transportation - Lake Cou | 08/31/2015 | 17 | |
| Chandler, Lea Ann | Transportation - Lake Cou | 07/31/2015 | 20 | |
| Chandler, Lea Ann | Transportation - Lake Cou | 08/31/2014 | 17 | |
| Chandler, Lea Ann | Transportation - Lake Cou | 07/31/2014 | 20 | |
| Chandler, Lea Ann | Transportation - Lake Cou | 08/31/2009 | 17 | |
| Chandler, Lea Ann | Transportation - Lake Cou | 07/31/2009 | 20 | |

**Add**     **Edit**     **Delete**     ☐ Active Only

**Donations**

These are donations made by the station and explained in detail in Donations.

| Profile | Jobs/Clients | Volunteers | Hours | Donations | Comments | Documents |

| **Date** | |
| --- | --- |
| 06/30/2012 | |
| 09/30/2015 | |
| 09/30/2016 | |

Type: Non-Monetary

Amount $: 675.00          Check No.

Payment Type:

Non-Monetary: Lunch          $          675.0

Gift Received:          $          0.0

Net Amount $: 675.00

Source:

Matching:

In Memory of:

Earmarked for:

Anonymous ☐

Receipt Needed ☐          Receipt Sent 09/30/2016

Comment          Added 02/14/2017          Revised 02/14/2017

**Add**          **Edit**          **Delete**          **Print**

**Comments**

On the Comments tab, you can write as much as you need to about a station. These notes can be useful to keep track of information that doesn't fit anywhere else and doesn't need to be searched. You can set the access of comments by each individual user to **Full**, **Read-Only**, or **None** under **File | Users**.

| Profile | Jobs/Clients | Volunteers | Hours | Donations | Comments | Documents |

07/28/2010 - Volunteers may help by doing friendly visits, assisting with special events and serving as requested and within their ability to do so. Instruction, scheduling and supervision will be provided by the Hospital staff.

04/05/2011 - They report a strong upswing in the number of volunteers needed.

03/15/2012 - They are interested in sponsoring another luncheon for their volunteers.

**Top**    **Bottom**    **Edit**
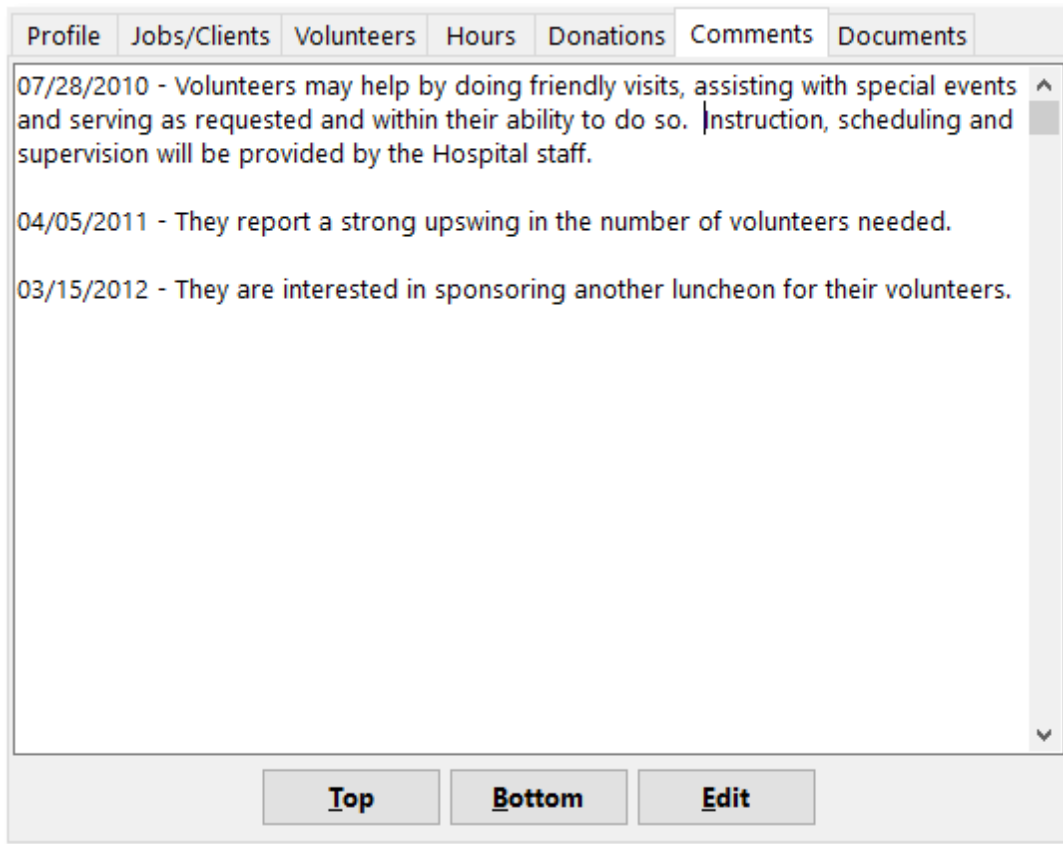
The Top and Bottom buttons will reposition the comments, but you won't notice their effect unless you have comments that are longer than one screen. While editing comments you can click on the **Add Date** button to insert today's date at the current cursor's location.


**Documents**
The documents tab is a list of documents attached to the station. You can attach any sort of document. It can be a document you have written like a Word document, a scanned copy of a paper document, a photo, or anything else. Whatever you need to keep with the station. **Add** a document by giving it a descriptive name and selecting the actual document. With a checkmark when adding, you can choose to keep the original or to delete it which has the effect of moving it from the original location to storage with your station's data. You can also drag a document onto the station's record. Click on **Export** to email or send a copy of it to any location on your computer. **Open** the document either with the Open button or by double clicking on it.

**Print**

Use the Print button to print a variety of reports for this one station including a Station Profile, hour reports, letters and envelopes.

# 7 Jobs/Clients

This section of the program enables you to add and edit information about jobs. These are the actual jobs at which volunteers are placed and work. Any job must be associated with one particular station, but one station will often consist of many jobs. For example, the Red Cross would be a station, while office receptionist and blood bank worker for the Red Cross would be the jobs.



**Job or Client**
The Reporter enables you to keep track of either jobs or clients. A job is an activity or task which volunteers perform. A client is a person whom a volunteer works with. You can have a combination of both jobs and clients. The Reporter works just as well with either, although some fields will only apply to one or the other. As shorthand, the Reporter often refers to them as just jobs.

**Finding a Job/Client**
The easiest way to find a job is to start typing its name in the "Find" field in the bottom left corner of the screen. Use the **Up** and **Down** arrows of your keyboard to scroll through the list quickly. To scroll even faster, try the **Home**, **End**, **Page Up** and **Page Down** keys, too. They are often easier to use for scrolling than the mouse.

BISHOP| Find

If you don't know a job's name, click on the Find button which pops open a large grid of your jobs. In this grid, every column is "searchable". For example, to find a client by their first name, click on the column heading **1st Name**. That sorts the list by their first name. Then type their name into the "Find" field. You can just as easily search by city, zip, telephone, or email address. Just click on any column heading to sort the list by that column.

**Find a Jobs/Client (Active Only)**

Click on a column heading to sort the list and then use the find field to locate a jobs/client.

| Job No. | Job Name | Client First Name | Client Last Name | First Address | City | ST |
|---------|----------|-------------------|------------------|---------------|------|-----|
| J00071 | American Red Cross | | | 888 8th Ave | Frenchtown | MT |
| J00135 | Ammons, Mary | Mary | Ammons | 1125 W. N. 2nd | Frenchtown | MT |
| J00028 | Appalachia Project | | | 321 S. Hamilton | East Missoula | MT |
| J00039 | Arthur Home | | | 423 Eberhardt Drive | Missoula | MT |
| J00029 | Arthur Meals on Wheels | | | 514 Orchard | Missoula | MT |

**Active vs. Inactive**
In the upper left corner of the screen are three buttons: All, Active, and Inactive. Active are jobs without a termination date, inactive are jobs that have been terminated, and all includes both. When you terminate a job it is moved to the Inactive list in order to avoid cluttering the screen.

**Add a Job/Client**
Click the Add button to enter a new job. The job number is automatically entered as well as any default values you previously set in Preferences. All other fields are blank waiting for you to enter data. For more efficiency, press tab to move to the next field without having to take your hands off the keyboard.

When adding a new job, the Reporter enables you to copy some data directly from the station. You can have the address, phone numbers, email address, and contact names duplicated from the station without having to reenter the same information.

**Copy from Station?**

? Do you want to copy details from this station?

Yes     No

**Edit a Job/Client**
Edit a job to change some piece of information.

**Terminate a Job/Client**

Terminate a job that is no longer taking volunteers. Terminate a job by clicking on the Terminate button and entering a termination date. When you terminate a job, the Reporter also terminates all volunteer placements at the job. Terminating a job does not affect the hours that have already been entered at that job. Whether a job is active or terminated, the hours served at it will always be reported.

**Restart a Job/Client**

You can restart terminated jobs shown on the Inactive list by clicking on the Restart button. You can choose whether to restart their placements or not. As always, the hours are unaffected whether the job is active or inactive.

**Delete a Job/Client**

You cannot delete a job for which there are hours worked on file. You must first delete all hours worked by volunteers for that job either one at a time from the Hours section or as a batch of old information using the Delete Old Data utility. Usually you will terminate a job instead of deleting it.

**Photos**

Attaching photos to a job or client's record is simple and easy. To load a photo, either drag it onto the photo location or click the green plus sign button. You don't have to first click the Edit button before adding a photo to a volunteer.



*Photo Editing Buttons*

There are six photo editing buttons above each photo. Instead of using the buttons, you can right-click on a photo to pop up the same photo editing choices.

Load Photo - Pick the correct photo for this job/client. You can also drag the photo onto the photo rectangle.

Rotate Left - spin the photo counter clockwise.

Rotate Right - spin the photo clockwise.

Crop Photo - Select a portrait from a larger photo containing extra background.

Delete Photo - Remove a photo from a job/client's record.

Export Photo - Save the photo as a separate file in order to use it for some other purpose.

More Photos - Keep up to six photos per record, labeling each, and choosing which is the default to be shown. For example, you might keep photos of the client as well as the care giver.

*Hints for taking good photos*
Take a portrait instead of a landscape photo. That's vertical, not horizontal.
Get very close with the camera. Fill the frame with just a head shot.

*Photo Resolution*
Cameras and phones can take very high resolution photos. Higher resolutions are important for printing enlargements, but for this application low resolution photos work just as well. The Reporter automatically reduces the resolution of any photo down to 640 x 480 pixels in order to save storage space on your computer.

**Turn Off Fields**
The Reporter includes more fields than you need. We do this so that everyone can keep whatever information they require about their stations.  This would be terribly confusing if we didn't enable you to turn off fields that you don't need. In Preferences, you can turn off fields that you don't use. You can also rearrange the order in which the fields are displayed and throw in horizontal lines to organize the screen.

**Set Default Values**
On the Field Lists screen you can pre-set default values to use when adding new stations.

**Required Fields**
The only required fields are Job Number, Job Name, and the date the Starting Date. You can leave all the rest blank.  In Preferences check any other fields as also being required.

**Fields**
In Preferences turn off unneeded fields, rename any fields, and rearrange the order.

| Field | Description |
|---|---|
| Job No. | Required and must be unique. |
| Job Name | The name of the job. Required unless it is a client. |
| Individual Client | Check this if this is a client instead of a job. |
| Client First Name | If it is a client, the client's first name. |
| Client Last Name | If it is a client, the client's last name. |
| Station | The station to which this job is associated. Required. You must enter a station before entering jobs for that station. |
| First Address | Street address. |
| Second Address | This optional field will not print on labels if it is blank. If this field is used, the post office delivers mail to this address. |
| City | Don't include a comma after the city because the Reporter does it for you automatically on labels and addresses. |

| Field | Description |
|---|---|
| State | The state is automatically capitalized. |
| Zip | Zip codes or postal codes. |
| Phone | Telephone number of the station. Include an extension at the end if needed. |
| Other Phone Type | The description of some other, unique phone for this station like "Alternate" or "Pager". |
| Other Phone | Phone number of unique phone. |
| Contact 1 Salutation | Ms., Mrs., Mr., etc. |
| Contact 1 First Name | First name of the contact. |
| Contact 1 Last Name | Second name of the contact. |
| Contact 1 Title | Title of the contact like "Executive Director" or "Volunteer Coordinator". |
| Contact 1 Email | Email address of the contact. You can automatically start an email message to this person by clicking on the Email button on the toolbar or by clicking on "Edit \| Start Email Message" on the top menu. |
| Contact1 Cell Phone | Cell phone of the contact. |
| Contact 2 | A second possible contact for the station. |
| Starting Date | Date the job first accepted volunteers. |
| Terminated | The date when the job no longer accepted volunteers. |
| Number Requested | The number of volunteers requested. |
| Number Filled | The number of current volunteer placements at this job. This is kept up to date automatically whenever you enter or delete placements, but you can change it if you need to. |
| Value Wage | The dollar value that this job would have to pay someone for this work. |
| Use Default Value Wage | If this is checked, you can change the default value wage in Preferences and it will automatically update the value wage for this job. |
| Stipended Job | Is this a stipend job? If so, stipends will be calculated when entering hours, but only for volunteers marked as being stipended. |
| Stipend per Hour | The stipend rate. The default rate for stipends is specified in Preferences. |
| Works with Veterans | Does this job work with veterans? |
| Service Category | An outdated job classification. You can turn this field off in Preferences. |
| Special Need | This is a special need of this client or job. Typically this field is only used by Senior Companion and Foster Grandparent programs. |
| Senior Corps Program | If you have indicated that you are an RSVP, FGP, or SCP in Preferences, it is shown here. |
| Objective and Service Activity | These are job classifications used by RSVP's, FGP's, and SCP's. The list of choices is customized for each of the three programs. Service Activity is also limited by your choice of Objective. For example, if you are a FGP, your choice of Objectives is limited and once you choose an objective, your choices of Service Activities is further limited. You can use the Copy/Paste buttons to quickly duplicate the objective and service activity from one job to another. |
| Client Birth Date and Age | The date of birth of the client. Age is calculated automatically. |
| Client Sex | Male(M) or Female(F). |
| Private Home | Is this client being served in a private home? |
| Mobilizes volunteers for | Do volunteers at this job mobilize volunteers for other organizations? |

| Field | Description |
|-------|-------------|
| other orgs. | |
| No. of vols. mobilized for other orgs. | The number of volunteers being mobilized at this job to serve in other organizations. |
| Total number of clients served | If this is an individual client, this is probably just 1, but if this is a job where a number of clients are served, it could be much higher. |
| Number of children of prisoners served | How many children of prisoners are being served at this job? |
| Number of children in foster care served | How many children in foster care are being served at this job? |
| Number of children mentored | How many children are being mentored at this job? |
| Number of adult ex-offenders served | How many adult ex-offenders are being served at this job? |
| Number of immigrants served | How many immigrants are being served at this job? |
| No. of seniors receiving living services | How many seniors are receiving independent living services at this job? |
| Number of caregivers provided respite | How may caregivers are being provided with respite at this job? |
| Skills | Which skills does this job require of its volunteers? The Reporter uses this information to help you match qualified volunteers with jobs requesting specific skills with the report called "Job Match". |
| Check Marks 1-10 | Change the name of these to use to keep track of yes/no information about your jobs like whether the job accepts disabled volunteers. |
| Codes Fields 1-20 | Use these for data that you pick off a list. For example, rename one to be County and enter a list of nearby counties. Then you can assign each job to one of them. In order to change the codes and what they mean, go to Preferences. |
| Text Fields 1-10 | Use these to enter unique information like the name of another contact. |
| Date Fields 1-10 | Use these to keep specific dates for jobs like when an training session needs to be renewed. |
| Number Fields 1-10 | Store numeric data about the job. |
| Lists 1-5 | Use these for data where you need to select one or many for each job or client. For example, you might want to keep track of multiple special needs for a client like dressing, feeding, and transportation. |
| Lists with Dates 1-5 | Use this type of list when you want to keep track of a date along with an item off a list. An example is a list of inspections and the date when each was completed for the job. |
| Contacts | You can keep track of up to nine additional contacts for each job/client such as emergency contacts, care givers, or physicians. You can choose to keep track of different types of contacts for each job/client. For each of these contacts, you can enter their address, two phone numbers, and an email address. |
| Impact Job | Is this an impact job? |
| What is counted besides hours 1-6 | When collecting hours, what other numerical counts would you like to collect? |

| Field | Description |
|-------|-------------|
| Community Need, Service Activity, Inputs, Accomplishments (Outputs), Impact (Intermediate Outcome), Impact (End Outcome) | These six text fields are the key elements of any impact statement as designed by the Corporation for National and Community Service. They print on the report called "Impact Statement". If used, they are shown on the separate Impact tab. |
| Added | Date this record was added. Set by the program and never changes. |
| Revised | Date this record was last revised. Updated automatically every time this record is edited. |
| Description | This is a blank screen for you to write a job description. You can type as much as you want in any format. This will print on the "Job Description" Report and can be posted on the web via the Web Assistant. |
| Comment | This is some space for you to write down whatever is important to know about this job that is not included elsewhere. You can type as much as you want. The comment is always shown on a separate tab. |
| Documents | Attach separate documents to a job or client. For example, keep a description of the job requirements as a Word document. Documents can be any electronic form including pdf's, jpg's, and docx's. |

**Copy/Paste Objective and Service Activity**

If you are a RSVP, FGP, or SCP, you can easily duplicate the objective and service activity from one job to another. After choosing an objective and service activity for one job, you can copy the pair by clicking on the **Copy** button and then paste that same pair to another job by clicking on the **Paste** button. You can only paste into a job where the objective and service activity are blank. If you have already entered them and want to change them, you must edit the record and change them manually. The copy/paste buttons are designed to easily update a number of similar jobs, especially when upgrading from a previous version of the Reporter.



**Volunteers**

You can manage all of a job's volunteers on this tab. If you choose **Active Only**, just those without an ending date will be listed. Double click on a **Primary** checkbox to mark it as being a primary placement. If you click on the **Primary** button, you can mark all placements at this job as being primary.

To add a new volunteer placement, click the **Add** button. Pick a volunteer and enter a starting date for the placement. Click the **Edit/Move** button  to either change the starting date of a volunteer placement or to move the placement to a different volunteer if, for example, the wrong volunteer was assigned to this job/client. Terminate a placement if a volunteer is no longer serving here and restart placements if the volunteer starts up here again. Typically, you would only delete placements that were mistakenly entered in the first place. Designate one placement per volunteer to be the primary placement by double clicking on the primary checkbox or clicking on the **Primary** button. Learn more about primary placements on the Placements screen.

**Hours**
You can manage hours from here or from the separate Hours screen. It works the same from either screen with all the same capabilities and features. It is explained in more detail in Hours, but basically you can sort the hours by clicking on column headings, add new hours for all of a station's volunteers on a single date, edit existing hours, delete mistakes, or move hours to a different volunteer. If you choose just **Active** hours, only those at placements without an ending date will be shown.

| | Profile | Volunteers | Hours | Schedules | Description | Impact | Comme | ◂ | ▸ |
|---|---|---|---|---|---|---|---|---|---|

| | Volunteer | Date | Hours | Minutes | Stipend $ | |
|---|---|---|---|---|---|---|
| ▶ | Emmons, Mary | 12/31/2011 | 5 | 0 | 0.00 | P |
| | Erwin, Susan | 10/31/2015 | 5 | 0 | 0.00 | P |
| | Erwin, Susan | 08/31/2015 | 4 | 0 | 0.00 | P |
| | Erwin, Susan | 01/31/2015 | 3 | 0 | 0.00 | P |
| | Erwin, Susan | 10/31/2014 | 5 | 0 | 0.00 | P |
| | Erwin, Susan | 08/31/2014 | 4 | 0 | 0.00 | P |
| | Erwin, Susan | 01/31/2014 | 3 | 0 | 0.00 | P |
| | Erwin, Susan | 10/31/2009 | 5 | 0 | 0.00 | P |
| | Erwin, Susan | 08/31/2009 | 4 | 0 | 0.00 | P |
| | Erwin, Susan | 01/31/2009 | 3 | 0 | 0.00 | P |
| | Erwin, Susan | 10/31/2008 | 5 | 0 | 0.00 | P |
| | Erwin, Susan | 08/31/2008 | 4 | 0 | 0.00 | P |

☐ Active Only

| Add | Edit | Delete | Move |
|---|---|---|---|

**Schedules**

You can schedules volunteers at their job placements ahead of time. Click on a single day to see more detail and to add or edit schedules. Duplicate individual schedules or a week at a time. Learn more about scheduling at Schedules.

| Profile | Volunteers | Hours | Schedules | Description | Impact | Comme | ◀ | ▶ |

| Sun | Mon | Tue | Wed | Thu | Fri | Sat |
|---|---|---|---|---|---|---|
| May 28 | 29<br>09:00a Emr<br>01:00p Hav | 30<br>08:00a Mcc<br>09:00a Fou | 31<br>09:00a Emr<br>01:00p Hav | Jun 1<br>08:00a Coll | 2 | 3 |
| 4 | 5<br>09:00a Emr<br>01:00p Hav | 6<br>08:00a Mcc<br>09:00a Fou | 7<br>09:00a Emr<br>01:00p Hav | 8<br>08:00a Coll | 9 | 10 |
| 11 | 12<br>09:00a Emr<br>01:00p Hav | 13<br>08:00a Mcc<br>09:00a Fou | 14<br>09:00a Emr<br>01:00p Hav | 15<br>08:00a Coll | 16 | 17 |
| 18 | 19<br>09:00a Emr<br>01:00p Hav | 20<br>08:00a Mcc<br>09:00a Fou | 21<br>09:00a Emr<br>01:00p Hav | 22<br>08:00a Coll | 23 | 24 |
| 25 | 26<br>09:00a Emr<br>01:00p Hav | 27<br>08:00a Mcc<br>09:00a Fou | 28<br>09:00a Emr<br>01:00p Hav | 29<br>08:00a Coll | 30 | Jul 1 |

◀   **June 2017**   ▶

**Duplicate**      **Delete**      **Print**

**Description**
On the Description tab, you have a blank screen to write a job description. You can type as much as you want in any format. This will print on the "Job Description" Report and can be posted on the web via the Web Assistant.

| Profile | Volunteers | Hours | Description | Impact | Comments | Documents |

Volunteers will be phoning and mailing clients on a regular basis.

The Top and Bottom buttons will reposition the description, but you won't notice their effect unless you have descriptions that are longer than one screen.

**Impact Jobs**
An Impact Job is one where volunteers are making an impact on your community. It's a job where you want to keep track of "what difference did we make?" You may want to track this kind of impact information for just some of your jobs which is fine. You can use it for a few jobs or all of them.

The Volunteer Reporter can help you keep track of impact jobs in two ways. First, for each impact job, you can write complete statements for Community Need, Service Activity, Input, Accomplishment and Impact. A report, the Impact Statement, prints this information for all of your impact jobs or enables you to send it to your word processor for incorporation into a more complete impact document.

Secondly, you can keep track of two additional "counts" at the same time you enter hours and you can assign the "counts" a different name for each impact job. For example, if volunteers at a particular impact job are counseling families, you can use the Volunteer Reporter to not only keep track of how many hours the volunteers served, but also how many families they counseled and how many counseling sessions they kept. Another report, Impact Job Counts, compiles this information for any period of time which you can then incorporate into your impact statement.

For any Impact Job, you need to check the "Impact job?" field on the Profile tab. This tells the Volunteer Reporter that this job should be included on any impact job reports. If not, this job will not be included on the Impact Statement or Impact Job Counts reports even if you entered other impact information for the job.

The next field is "What is counted besides hours?". This is an optional field that is used when entering hours. This won't apply to all of your impact jobs, but will be very handy for some. When entering hours, you have the option of entering an additional "count" at the same time as hours. For example, you may have an impact job where volunteers assist low income families to prepare their tax forms. In this case, it would be useful to know not only how many hours your volunteers served, but also how many families they assisted. For this job you might enter "What is counted besides hours?" as "Families". Then, whenever adding hours served by volunteers at this job, you can also enter how many families the volunteer assisted right below the hours field. This information is then tallied on the report "Impact Job Counts".

The 6 text fields on the Impact tab enable you to type as much information as needed for each. These are the 6 key elements for any impact job as designed by the Corporation for National and Community Service. This can be a great place to keep this information about your impact jobs and is printed on the report called "Impact Statement".



The report "Impact Statement" can be printed from two different places. It can be printed for a single impact job right from the job screen. It can also be printed for all of your impact jobs from the "Job Reports" menu. The Impact Statement can be used just as it is printed, or you can send it to a file on your hard disk which you can then open in your word processor and incorporate into a longer document.

The report "Impact Job Counts" is found on the "Statistics" report menu. It totals the hours and any additional counts for all of your impact jobs and can be printed as a summary or with a subtotal for each volunteer.

**Comments**

On the Comments tab, you can write as much as you need to about a job. These notes can be useful to keep track of information that doesn't fit anywhere else and doesn't need to be searched. You can set the access of comments by each individual user to **Full**, **Read-Only**, or **None** under **File | Users**.



The Top and Bottom buttons will reposition the comments, but you won't notice their effect unless you have comments that are longer than one screen. While editing comments you can click on the **Add Date** button to insert today's date at the current cursor's location.
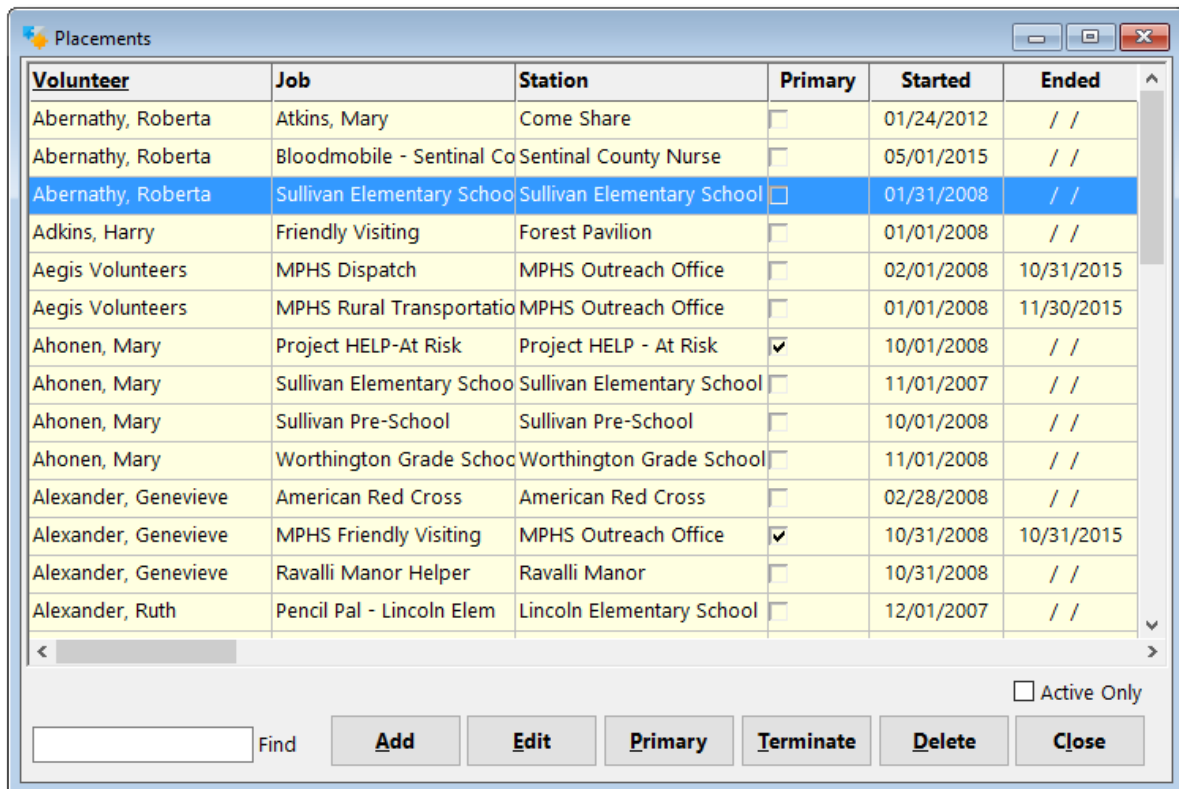
**Documents**
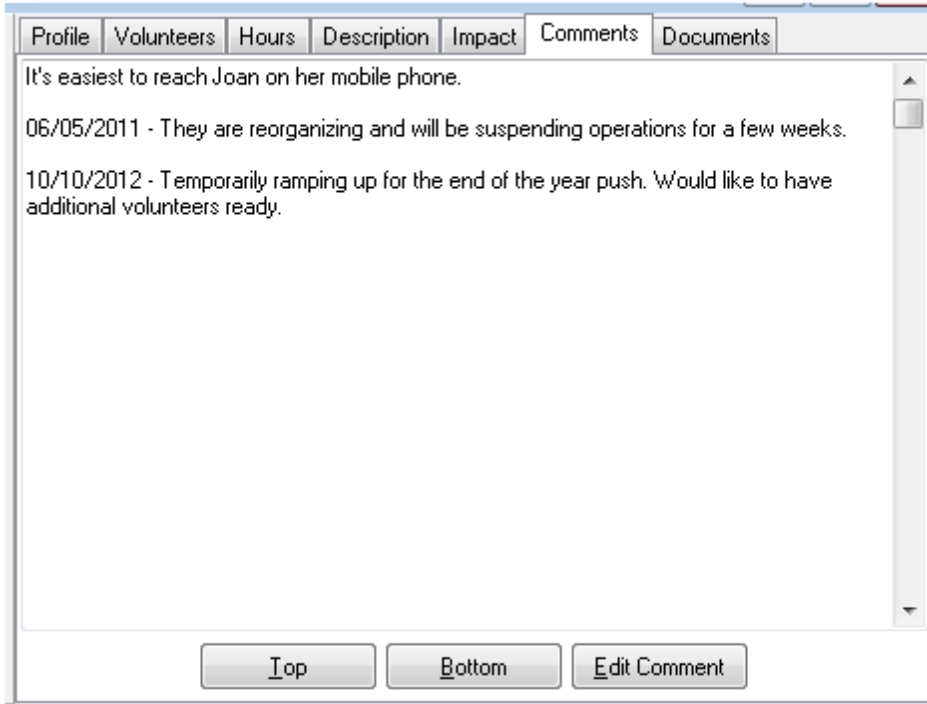
The documents tab is a list of documents attached to the job or client. You can attach any sort of document. It can be a document you have written like a Word document, a scanned copy of a paper document, a photo, or anything else. Whatever you need to keep with the job/client. **Add a document** by giving it a descriptive name and selecting the actual document. With a checkmark when adding, you can choose to keep the original or to delete it which has the effect of moving it from the original location to storage with your job/client's data. You can also drag a document onto the record. Click on **Export** to send a copy of it to any location on your computer. For example, export a copy to your desktop so that you can attach it to an email. **Open the document** either with the Open button or by double clicking on it.
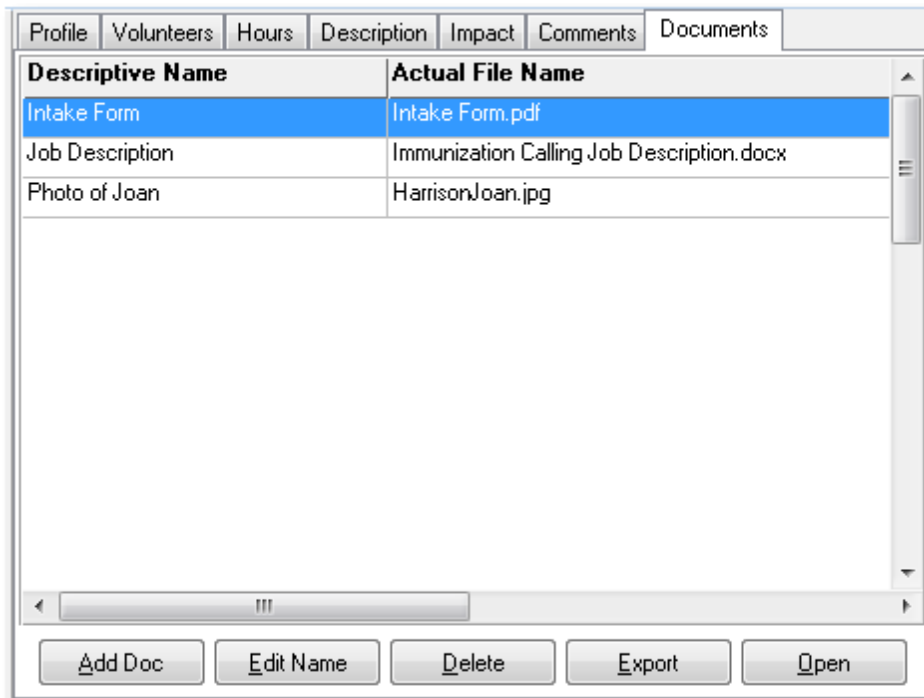
**Print**
Use the Print button to print a variety of reports for this one job including a Job Match report that lists all possible volunteers for this job based upon the volunteer's skills.

# 8    Placements

This section of the program enables you to add and edit information about volunteer placements at jobs. A volunteer is placed at a job when he/she first starts working there and is considered to still be placed at the job until you come here and specifically enter an ending date for the placement. Just because a volunteer no longer works at a job does not mean that the volunteer is no longer placed. The Volunteer Reporter needs to be told that the placement has ended.



**Add a Placement**

When adding new job placements, select the volunteer and job and enter the starting date. The program only allows one record for one combination of the same volunteer and job. The program will tell you if the volunteer is already placed at that job. The starting date must fall after the starting date of both the volunteer and the job/client. You can choose to mark this new placement as the primary placement for this volunteer. If you mark this one as primary, a previously marked placement for the same volunteer will be automatically unchecked as primary since each volunteer can have only one primary placement. After entering a starting date, click on the **Save** button. You can then continue to add new placements by selecting a different volunteer and/or job. When you are all done adding new placements, click the **Close** button.

### Edit a Placement

You can change the starting date of a placement if you entered it incorrectly. For a terminated placement, you can change the ending date. In either case, the program will prevent you from entering a starting or ending date outside of the valid range for this placement, based upon the starting and ending dates of the volunteer and job as well as when hours were served at this placement.

### Make a Placement Primary

You can make mark a placement as being the primary placement for a volunteer by either double clicking on the primary checkbox or clicking the **Primary** button. For RSVP's, FGP's, and SCP's, the Corporation for National and Community Service requires that volunteers be counted only once, no matter how many different jobs they perform. To meet this requirement, each placement can be marked as being "primary." The Reporter ensures that each volunteer has only one primary placement. You can run a Volunteer report called **Primary Placements** to learn which volunteers do not yet have a primary placement chosen.

### Terminate or Restart a Placement

When a volunteer is no longer serving at a job/client, terminate the placement. You can also restart a placement that was previously terminated. When terminating a placement, the Reporter limits the termination date to fall within a valid range based upon when the most recent hours were served at the placement.

### Delete a Placement

You cannot delete a placement for which there are hours worked on file. You must first delete all hours worked by volunteers for that job either one at a time from the Hours section or as a batch of old information using the [Delete Old Data](#) utility. Deleting a placement is not the same as ending the placement. When a volunteer stops working at a job enter an ending date for the placement, but don't delete the placement because we still want a record of the placement for our files.

**Active Only**
If you choose just **Active** placements, only those without an ending date will be shown.

**Placement Count**
When adding new placements or terminating existing ones, the Reporter updates the total number filled for the job.

# 9    Hours

This section of the program enables you to add and edit information about hours worked by volunteers at jobs as well as the amount of claimed reimbursement by the volunteers.

**Grid Display**

All of your existing hours are shown on this large grid. It is similar to a common spreadsheet and uses many of the same controls and shortcuts.

| Volunteer | Job | Station | Date | Hours | Minutes | Sti |
|---|---|---|---|---|---|---|
| Angel, Velena Nell | Tri. Co. Thrift Shop | Thrifty-T Boutique | 10/31/2008 | 3 | 0 | |
| Angel, Velena Nell | Tri. Co. Thrift Shop | Thrifty-T Boutique | 09/30/2008 | 5 | 0 | |
| Angel, Velena Nell | Tri. Co. Thrift Shop | Thrifty-T Boutique | 08/31/2008 | 18 | 0 | |
| Angel, Velena Nell | Tri. Co. Thrift Shop | Thrifty-T Boutique | 01/31/2008 | 17 | 0 | |
| Arnold, Ina Mae | Herrick Peace Meal Helper | Herrick Peace Meal Nutriti | 12/31/2013 | 5 | 0 | |
| Arnold, Ina Mae | MPHS Friendly Visiting | MPHS Outreach Office | 11/30/2015 | 14 | 0 | |
| Arnold, Ina Mae | MPHS Friendly Visiting | MPHS Outreach Office | 10/31/2015 | 5 | 0 | |
| Arnold, Ina Mae | MPHS Friendly Visiting | MPHS Outreach Office | 01/31/2015 | 6 | 0 | |
| Arnold, Ina Mae | MPHS Friendly Visiting | MPHS Outreach Office | 11/30/2014 | 14 | 0 | |
| Arnold, Ina Mae | MPHS Friendly Visiting | MPHS Outreach Office | 10/31/2014 | 5 | 0 | |
| Arnold, Ina Mae | MPHS Friendly Visiting | MPHS Outreach Office | 01/31/2014 | 6 | 0 | |
| Arnold, Ina Mae | MPHS Friendly Visiting | MPHS Outreach Office | 11/30/2009 | 14 | 0 | |
| Arnold, Ina Mae | MPHS Friendly Visiting | MPHS Outreach Office | 10/31/2009 | 5 | 0 | |
| Arnold, Ina Mae | MPHS Friendly Visiting | MPHS Outreach Office | 01/31/2009 | 6 | 0 | |

☐ Active Only

Find    | **Sort** | **Add** | **Edit** | **Delete** | **Close**

- Scroll to the right to see more columns of reimbursements.
- Drag the screen wider or longer to see more at one time.
- Click on a column heading to sort the data by that column.
- Drag columns left or right to rearrange the order.
- Widen columns by clicking and dragging on the vertical lines between column headings.
- Type in the Find field to search in the currently underlined column.

**Shortcuts**

**Home** Jump to the first column.
**End** Jump to the last column.
**Ctrl-Home** Jump to the first column and first row.
**Ctrl-End** Jump to the last column and last row.
**PgUp** Scroll up one screen at a time.
**PgDn** Scroll down one screen at a time.
**Ctrl-PgUp** Jump to the first row in the same column.
**Ctrl-PgDn** Jump to the last row in the same column.

The **Sort** button enables you to sort the data in a number of options. The options listed as default are

what happens when you simply click on a column heading.

When either **Adding** or **Editing**, you choose to work with a subset of the overall data. For example, it's common to add hours for one date at a time. The Reporter takes a moment to prepare a grid or just volunteer placements that were valid on the date you choose. Any hours that you have already entered for that date are already present and you can simply scroll down the list to enter more hours on that date. It's very simple and intuitive.

### Active Only
If you choose just **Active** hours, only those at placements without an ending date will be shown.

### Adding Hours
When you start to add new hours, the Reporter only allows you to add hours to a volunteer with an active placement. In other words, if you haven't yet entered a placement for a new volunteer, you can't enter hours for the volunteer.

When entering hours, the program enables you to either enter hours for each date, or you can manually add the hours for several dates together and enter the total as one date. The program only allows one record for a combination of the same volunteer, job, and date.

### Flex Add
Usually we add many hours on the same date in one batch. It is most efficient for most people. Occasionally however, you may want to add a few records that don't all fall on the same date. Flex Add enables you to do this quickly. When you choose to add by Flex Add, you can add hours for any volunteer at any job on any date. And you can continue adding as many as needed by clicking on **Save & New**.



### Editing Hours

When editing hours you may only change the date, hours, and reimbursements amounts, not the volunteer or job. If you have mistakenly entered hours for the wrong volunteer or job, click on the Move button instead.

**Moving Hours**
Move hours to a different volunteer or job when you have added them to the wrong one. You can only move hours from the Volunteer or Job screens.

**Fields**

**Date**  Date the volunteer worked. Usually the last day of the month for all hours served that month. Required.
**Hours**  The number of hours worked. Required.
**Stipend**  A stipend to pay to the volunteer for their time served. It is calculated automatically based upon the number of hours served and the stipend rate for the job. You can override the calculated amount if you need to. Stipend is only calculated if the job is checked as being a stipend job and the volunteer is checked as being a stipended volunteer.
**Other Counts**  Additional numeric fields that you can use to keep track of customized counts. In this example, the two count fields have been named "Children" and "Phone Calls" for this job.
**Car Miles**  The number of miles driven by the volunteer. This is multiplied by the cost per mile to determine the amount to reimburse for mileage.
**Cost per Mile**  You set the default cost per mile in the Preferences section of the program, but when editing a record here, you can change it.
**Drove Car**  Did the volunteer drive a car? This is used on the Car Drivers report.
**Bus**  Amount to reimburse for bus transportation.
**Van**  Amount to reimburse for van transportation.
**Taxi**  Amount to reimburse for taxi transportation.
**Meal**  Amount to reimburse for meals.
**Parking/Tolls**  Amount to reimburse for parking and tolls.
**Other**  Amount to reimburse for other expenses.
**Total**  The total of mileage and reimbursements.
**Wants Reimbursement?**  Does this volunteer want reimbursement for these expenses? This is copied from the volunteer's information each time, but you can change it here which will affect only this hourly record. This field affects the Hours Served Report in that if it is unchecked, all the reimbursement for this record will be counted as an in-kind donation.
**Entered**  The date this information was entered into the Reporter. This is used on the Hours Data Entry List to produce a cross check on your data entry.

Enter the full reimbursement amounts claimed by each volunteer no matter what your reimbursement limits may be. Later, when preparing reports, the Volunteer Reporter will use the reimbursement limits you entered in the Preferences section in combination with the field "Wants Reimbursement?" to determine how much of each volunteer's claimed reimbursement will be counted as reimbursement vs. an in-kind contribution.

# 10 Schedules

Use Schedules to keep track of when volunteers will be serving at their placements. You can set schedules from either the Volunteer or Jobs/Clients screen.



**Adding a Schedule**
To add a new schedule, click on the day of the month, then the Add button. You can only add schedules for current placements already on file. If you haven't yet placed the volunteer at the job, you will have to cancel this and first add the placement.

The Reporter accepts schedules in 15 minute blocks of time. You can either select the start and ending times or the number of hours to be served.

**Double Shifts**
If a volunteer is going to serve more than once during a single day, enter a second schedule. For example, add the first one from 9-11am and the second from 3-5pm.

**Delete a Schedule**
Since schedules are fairly temporary by nature, you can delete several of them at one time using a variety of methods. You can delete from either the calendar screen or the day's screen. From the calendar screen, you can delete schedules by the week or the month. If you first click on the day, you can delete individual and daily schedules.

**Duplicating Schedules**
Volunteer's schedules often repeat week after week. You can duplicate schedules either from the calendar screen or the day's screen. From the calendar screen, you can duplicate schedules a week at a time. If you first click on the day, you can duplicate either a single schedule or the day's worth of schedules.

**Printing, Emailing, and Exporting Schedules**
The Print button includes several reports showing schedules as well as options to email and export schedules. The email option prepares an email with the selected schedules included and can be sent to either the volunteer (from the Volunteer screen) or the job contacts (from the Job screen). You can only export schedules from the Job screen. It creates a file suitable for posting to Google Calendar.

# 11 Donations

The Reporter can track donations from either volunteers or stations. Donations fall into three types: pledges, monetary, or non-monetary. Volunteers will normally be making pledges of future donations or monetary donations. You might also receive a non-monetary donation from a volunteer such as a used computer. Stations can also pledge or donate money, but they might more often donate non-monetary items such as tee shirts, mugs, or lunches. If a station regularly donates the same type of non-monetary item you can add it to the list of non-monetary items to make it easy and accurate to enter it often by just picking it off the list.

| Profile | Placements | Hours | Donations | Schedules | Comments | Documents |
|---------|-----------|-------|-----------|-----------|----------|-----------|

| Date ↑ |
|--------|
| 08/15/2008 |
| 09/01/2009 |
| 11/10/2010 |

Type: Monetary
Amount $: 100.00    Check No.: 5796
Payment Type: Check
Non-Monetary: $ 0.00
Gift Received: $ 0.00
Net Amount $: 100.00
Source: Annual Banquet
Matching:
In Memory of: Jane Howard
Earmarked for: Education Outreach
Anonymous: ☐
Receipt Needed: ☑    Receipt Sent: / /
Comment    Added: 11/20/2010    Revised: / /

Comment: Mary gives generously every year.

| Add | Edit | Delete | Print |

Click on the "Date" column heading to swap the order of the donations.

You enter donations from either the Volunteer or Station screen; there is not a separate button for donations as there is for hours. Both volunteers and stations have a separate tab dedicated to donations. Donations are listed in order by the date they were made. Scroll through the list of dates to see individual donation details.

You can enter as many donations as needed for any volunteer or station. First select the volunteer or station making the donation and then click on the Add Donation button to enter a new donation. When you click on Add (or Edit) a new screen pops up where you enter the information for the donation.

**Codes**
Donations include a number of coded fields where you pick an item from a drop down list. These include Donation Type, Payment Type, Non-Monetary Item, Gift Item, Source, Matching, In Memory of, and Earmarked for. The first one, Donation Type, has only three choices which can't be changed: Monetary, Non-Monetary, and Pledge. The second, Payment Type, has three options, Cash, Check, and Credit Card, but you can add more. All of the others start off empty until you enter codes to choose from. Go to Preferences to add the codes for all of these fields.

**Field Descriptions**
**Date**  The date the donation was made.
**Donation Type**  The type of the donation which can only be monetary, non-monetary, or pledge. A monetary donation is a donation of money whether it is paid by cash, check, or credit card. A non-monetary donation can be either a one-time donation of some item of value such as a computer or an automobile or it can be an item like a hat, tee shirt, or lunch that is offered by a station to their volunteers. A pledge is a promise to donate money at a later time.
**Amount**  The amount of the donation or pledge. If it is a monetary donation, this is the amount donated. If it is a non-monetary donation, this  field is "grayed out" and not available for use because the value of the non-monetary item is entered below in the "Non-Monetary" section. After you enter the non-monetary details you will notice that this amount is updated to match the total value of the non-monetary donation. If this is a pledge, this is the amount pledged.
**Payment Type**  This field is only available if this is a monetary donation and indicates how it was paid. Usually the choices are cash, check, and credit card, but you can add more choices in the reference codes section of the Reporter.

**Check No.** If the donation was paid with a check, you can enter the number of the check.

**Non-Monetary Fields** These fields are only available if the donation is a non-monetary type.

>**Item** If the non-monetary donation is given by a station on a regular basis, pick it from this list. You must have already entered the item as one of the choices in the reference codes section of the Reporter. Examples would be tee shirts, mugs, hats, and lunches. If several of your stations donate the same item such as lunch, you should describe them separately such as "Lunch - St Pat Hospital" and "Lunch - Community Hospital" since each will have a separate value. If the non-monetary item is a one-time donation like a computer, leave this blank and enter the description of the item in the next field, Other.

>**Other** If the non-monetary donation is a one-time item, enter a description of it here. Click the checkbox and then enter a description of the item.

>**Quantity** How many of these non-monetary items were donated. In the case of stations donations, you can enter a lot at one time such as 150 lunches for the month.

>**Value** The value of a single one of this item. If you chose the item from the drop down list, this is entered automatically, but can be changed if needed.

>**Total Value** The total value of the non-monetary donation which is calculated by multiplying the quantity times the value. This total value is also automatically entered into the Amount field above.

**Gift Received Fields** A gift is an item the donor receives from you in return for their donation or pledge. A common example is a luncheon where the donor gives $20 and in return receives a lunch worth $10. By entering the value of the gift here, the Reporter can accurately calculate the amount of of a donation that is tax deductible.

>**Item** If you give this item on a regular basis or to many donors, take the time to enter it using the Reference Codes section so that you can choose it from this drop down list. You should probably keep similar items separate when you add them to the list since values will change over time. For example a lunch next year will have a different value than this year's, so enter them as "Lunch 2007" and "Lunch 2008".

>**Other** If the gift is not on the drop down list, you can enter it here as a one-time gift the donor received.

>**Quantity** How many of the gifts did the donor receive?

>**Value** The value of a single gift. If you chose the item from the drop down list, this is entered automatically, but can be changed if needed.

>**Total Value** The total value of the gift which is calculated by multiplying the quantity times the value.

**Net Amount** This is calculated by subtracting the total value of the gift from the amount of the donation. This is the "tax-deductible" portion of the donation.

**Source** Where did the donation come from or what prompted the donation? Examples might be "Mailing Dec 07", "Campaign 12", "Annual Drive 2008", "Radio PSA 3", or "Unknown". By tracking the source of the donation, the Reporter can help you determine the success of any particular campaign. Enter values for this drop down list in the Reference Codes section of the Reporter.

**Matching** If the donation is part of a matching campaign with other donations, keep track of it here. A couple of examples would be "Capital Campaign 2008" or "Smith Matching Grant". Enter values for this drop down list in the Reference Codes section of the Reporter.

**In Memory of** Use this field to track donations given in memory of someone such as "Mary Jones" or "Fred Smith". The Reporter will then be able to tell you the total donations given in memory of a person. Enter values for this drop down list in the Reference Codes section of the Reporter.

**Earmarked for** If the donation is earmarked or designated for a specific purpose, track it with this field. Examples might be "General Fund", "Building Fund", or "Books". Enter values for this drop down list in the Reference Codes section of the Reporter.

**Anonymous** Check this if the donor wants to remain anonymous. This is mostly just a reminder for you because anyone using the Reporter can always tell who made the donation.

**Receipt Needed** This is checked by default when you add a new donation. Later it is used by the Reporter when printing receipts to know who needs a receipt. After printing and upon receiving your confirmation, the Reporter will update the record as no longer needing a receipt.

**Receipt Sent** Leave this date blank until a receipt has been sent to the donor. The Reporter will enter this for you automatically after printing a receipt for this donation.

**Added** The date the donation was added into the Reporter.

**Rev** The most recent date the donation was revised.

**Comment** Any kind of comment you would like to enter for this donation.

**Print Receipts**

Similar to printing **Letters and Envelopes**, you can use Microsoft Word to print any sort of receipt for donations. You use Word to create the basic receipt with merge markers for where the Reporter data will be inserted and then the Reporter performs the merge by inserting the donation information into the Word document. The Reporter can either open Word with the resulting receipt or print it directly.

### File Locations

Because the Reporter and Word have to work together in order to produce receipts, they must agree on the location of the files that are to be shared between them. You'll also want to share receipts among the various users in your office so you want the files in a location that can be shared by everyone.

By default, the Reporter puts these files in a subfolder of your data folder called "Shared Documents". For example, if your shared data is on drive F: in a folder called "F:\reporter\data", these files will be in "F:\reporter\data\Shared Documents". Click on Help | About the Reporter to view the location for these shared files.
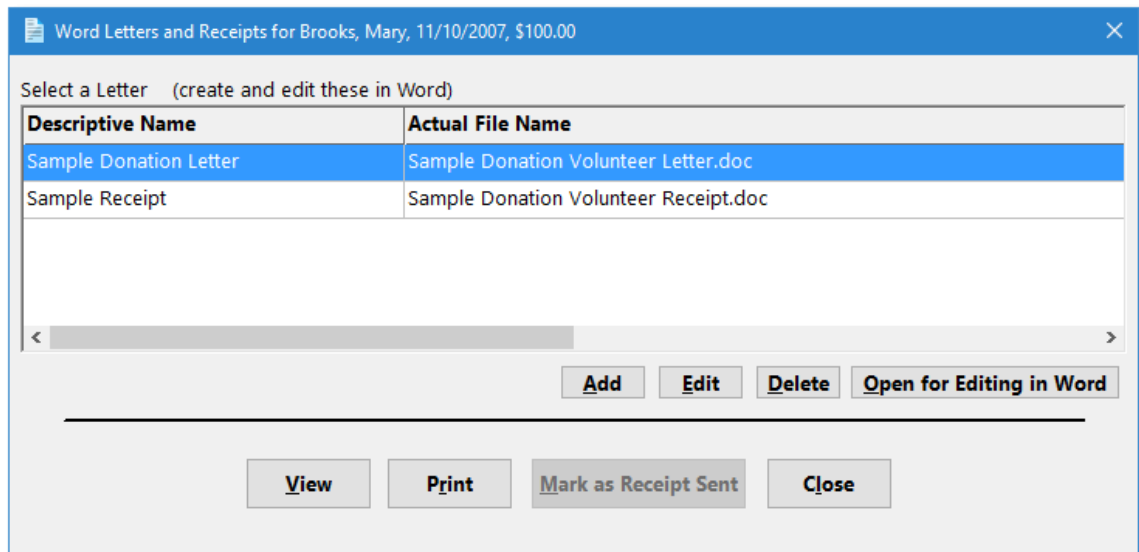


### Samples

We supply a couple of sample receipts for you to study and experiment with. Start with a sample and modify it to fit your needs. Remember to "Save As" a new document in order to preserve the original.

When designing a receipt for volunteers, use the **DonationVolunteerData.vrd** file as a data source or **DonationStationData.vrd** as the data source when designing receipts for stations. The actual names will be inserted by the Reporter, but in order for the data source substitution to work correctly, you must use the data source that we supply when you design your letter.

### How to Create Your First Receipt

1. Always start with one of our sample receipts. It's easier to remove unwanted text from a sample than to start from scratch. Highlight a sample letter on the **Word Letters and Receipts** screen and click on **Open for Editing in Word**.

2. In Word, rename the sample to become your own letter. **Click on File | Save As** and give it a new name. It must remain in the Shared Documents folder. Leave the extension as .doc.

3. The data source will already be opened as long as you start with one of our sample letters. If not, select a data source to use while designing the letter. Different versions of Word do this in slightly different ways, but in general you go through the **Tools** menu to either a Mail Merge wizard or toolbar. Either will enable you to "Open a Data Source". Select the data source listed at the top of the sample letter. Usually this will be **DonationVolunteerData.vrd** which is also located in the Shared Documents folder. By selecting this data source, you ensure the data will match exactly when you perform the actual merge from the Reporter. The data source consists of just a few sample records that you can use to design your letter. Your real data will be inserted later when performing the merge from the Reporter.

4. Make any changes you want to the letter. Remove the sample text and insert your own.

5. Insert merge fields in the appropriate locations. In most versions of Word, click on the toolbutton to **Insert Merge Field**.

6. Test merge your letter with the sample data. Click on the **Merge** toolbutton.

7. Save your new letter and exit from Word.

8. Back in the Reporter, add your new letter to the list of available letters. Click on the **Add** button on the **Word Letters and Receipts** screen. Give it a descriptive file name which can be anything and then the actual file name you saved it as in Word. The samples we supply use the same name for both descriptive and actual, but there's no reason to do that for your real letters.

9. Try out your finished product. Click on **View** to open Word with your data merged with your new letter.

**Selecting Which Donations to Include**
You can print receipts either one at a time or many at once. To print just one at a time use the print button located on the Donations tab of either the Volunteer or Station screen. Since you have a single donation already showing on the screen at this point, the Reporter knows you want to print a receipt for this single donation and all of the selection fields are grayed out and unavailable.

To print a number of receipts at once, use the main Reports menu. Click on Reports | Donation Reports | Letters and Receipts for either Volunteers or Stations. You cannot print receipts for both volunteers and stations at the same time. Enter a date range for the donations you want to include, an optional filter, and check whether to only include donations and whether to only include those marked as needing receipts. If you choose this last check to only include those needing receipts, after printing the Reporter will enable the button "Mark as Receipt Sent". Clicking on that button enables you to mark all receipts just printed with a date that the receipt was sent.

**Available Merge Fields for Receipts**
All of these fields are available for every receipt.

Volunteer Codes:
DONATEDATESHORT - donation date in a short format like 04/06/2002

DONATEDATELONG  - donation date in a long format like April 6, 2002
TYPE - type of donation. Either monetary, non-monetary, or pledge
AMOUNT - the amount of the donation
PAYTYPE  - payment type
CHECKNO - check number
NONMONITEM - non-monetary item
NONMONQNTY - non-monetary quantity
NONMONVALUE - non-monetary value of a single item
NONMONTOTAL - total value of non-monetary items
GIFTITEM - gift item
GIFTQNTY - gift quantity
GIFTVALUE - gift value of a single item
GIFTTOTAL - total value of gift items
NETAMOUNT - net amount of the donation
SOURCE - source of the donation
MATCHING - matching code
INMEMORYOF - in memory of code
EARMARKED - earmarked for code
ANONYMOUS - is the donation anonymous?
RECNEEDED - is a receipt needed?
RECSENTSHORT - receipt sent date in a short format like 04/06/2002
RECSENTLONG  - receipt sent date in a long format like April 6, 2002
NO - number
FIRSTLAST - first and last name or group name if it is a group
LASTFIRST - last name, first name or group name if it is a group.
MAILNAME - mailing name
SALUTE - salutation
FIRST - first name
LAST - last name
ADDR1 - first street address
ADDR2 - second street address
CITYSTZIP - city, state, and zip
CITY - city
STATE - state
ZIP - zip
COUNTRY - country
PHHM - home phone
PHWK - work phone
CELL - cell phone
PHOTH - other phone
PHONE4 - fourth phone
PHONE5 - fifth phone
EMAIL - email address
STARTSHORT - starting date in a short format like 04/06/2002
STARTLONG - starting date in a long format like April 6, 2002
ENDDTSHORT - terminated date in a short format like 04/06/2002
ENDDTLONG - terminated date in a long format like April 6, 2002
ENDCAUSE - termination cause
SERVEDTIME - years and months of service as of today
DOBSHORT- birth date in a short format like 04/06/2002
DOBLONG - birth date in a long format like April 6, 2002
AGE - age as of today
SEX - M/F

ETHNIC - ethnicity
RACIAL - racial group
DISABLED - person with disability (Y/N)
DRLICENSE - driver's license
DRLICEXP - driver's license expiration in a short format
SSNUMBER - social security number
ISVETERAN - is this a veteran?
LIFEPLEDGES - lifetime pledges
LIFEDONATIONS - lifetime donations
LIFEHOURS - lifetime hours
WANTSPAY - wants reimbursement (Y/N)
TIMESHEET - needs timesheet (Y/N)
NEEDSLABEL - needs mailing label (Y/N)
ISSTIPEND - stipended volunteer?
OVERINCOME - Turned away as over income?
UNDER60 - Turned away as under 60?
SCLEADER - Senior Companion Leader?
SCFROMSCL - Senior Companion Recruited by a Senior Companion Leader?
VOLFROMSCL - Community Volunteer Recruited by a Senior Companion Leader?
LOGICAL01 - (Y/N)
LOGICAL02 - (Y/N)
LOGICAL03 - (Y/N)
LOGICAL04 - (Y/N)
LOGICAL05 - (Y/N)
LOGICAL06 - (Y/N)
LOGICAL07 - (Y/N)
LOGICAL08 - (Y/N)
LOGICAL09 - (Y/N)
LOGICAL10 - (Y/N)
CODE01 - code field 1
CODE02 - code field 2
CODE03 - code field 3
CODE04 - code field 4
CODE05 - code field 5
CODE06 - code field 6
CODE07 - code field 7
CODE08 - code field 8
CODE09 - code field 9
CODE10 - code field 10
CODE11 - code field 11
CODE12 - code field 12
CODE13 - code field 13
CODE14 - code field 14
CODE15 - code field 15
CODE16 - code field 16
CODE17 - code field 17
CODE18 - code field 18
CODE19 - code field 19
CODE20 - code field 20
TEXT01 - text field 1
TEXT02 - text field 2
TEXT03 - text field 3
TEXT04 - text field 4

TEXT05 - text field 5
TEXT06 - text field 6
TEXT07 - text field 7
TEXT08 - text field 8
TEXT09 - text field 9
TEXT10 - text field 10
DATE01 - date field 1
DATE02 - date field 2
DATE03 - date field 3
DATE04 - date field 4
DATE05 - date field 5
DATE06 - date field 6
DATE07 - date field 7
DATE08 - date field 8
DATE09 - date field 9
DATE10 - date field 10
NUMBER01 - number field 1
NUMBER02 - number field 2
NUMBER03 - number field 3
NUMBER04 - number field 4
NUMBER05 - number field 5
NUMBER06 - number field 6
NUMBER07 - number field 7
NUMBER08 - number field 8
NUMBER09 - number field 9
NUMBER10 - number field 10

Station Codes:
DONATEDATESHORT - donation date in a short format like 04/06/2002
DONATEDATELONG  - donation date in a long format like April 6, 2002
TYPE - type of donation. Either monetary, non-monetary, or pledge
AMOUNT - the amount of the donation
PAYTYPE   - payment type
CHECKNO - check number
NONMONITEM - non-monetary item
NONMONQNTY - non-monetary quantity
NONMONVALUE - non-monetary value of a single item
NONMONTOTAL - total value of non-monetary items
GIFTITEM - gift item
GIFTQNTY - gift quantity
GIFTVALUE - gift value of a single item
GIFTTOTAL - total value of gift items
NETAMOUNT - net amount of the donation
SOURCE - source of the donation
MATCHING - matching code
INMEMORYOF - in memory of code
EARMARKED - earmarked for code
ANONYMOUS - is the donation anonymous?
RECNEEDED - is a receipt needed?
RECSENTSHORT - receipt sent date in a short format like 04/06/2002
RECSENTLONG  - receipt sent date in a long format like April 6, 2002
NO - number
STATION - station name

ADDR1 - first street address
ADDR2 - second street address
CITYSTZIP - city, state, and zip
CITY - city
STATE - state
ZIP - zip
COUNTRY - country
PHONE - phone
FAX - fax
PHOTH - other phone
WEB - web address
FIRSTLAST – Contact 1's first and last names
LASTFIRST – Contact 1's last and first names.
SALUTE – Contact 1's salutation.
FIRST – Contact 1's first name.
LAST – Contact 1's last name.
TITLE – Contact 1's title.
EMAIL – Contact 1's email address
CELL – Contact 1's cell phone.
FIRSTLAST2 – Contact 2's first and last names
LASTFIRST2 – Contact 2's last and first names.
SALUTE2 – Contact 2's salutation.
FIRST2 – Contact 2's first name.
LAST2 – Contact 2's last name.
TITLE2 – Contact 2's title.
EMAIL2 – Contact 2's email address
CELL2 – Contact 2's cell phone.
MOUSHORT - memorandum of understanding originally signed date in a short format like
04/06/2002
MOULONG - memorandum of understanding originally signed date in a long format like April 6, 2002
RENEWSHORT - memorandum of understanding last renewed date in a short format like 04/06/2002
RENEWLONG - memorandum of understanding last renewed date in a long format like April 6, 2002
DUESHORT - memorandum of understanding next renewal date in a short format like 04/06/2002
DUELONG - memorandum of understanding next renewal date in a long format like April 6, 2002
ENDDTSHORT - terminated date in a short format like 04/06/2002
ENDDTLONG - terminated date in a long format like April 6, 2002
STATYPE - station type
HEALTHCARE - health care facility (Y/N)
ISFAITHBAS - faith-based station (Y/N)
ISDISASTER - disaster services station (Y/N)
NEEDSLABEL - needs mailing label (Y/N)
LOGICAL01 - (Y/N)
LOGICAL02 - (Y/N)
LOGICAL03 - (Y/N)
LOGICAL04 - (Y/N)
LOGICAL05 - (Y/N)
LOGICAL06 - (Y/N)
LOGICAL07 - (Y/N)
LOGICAL08 - (Y/N)
LOGICAL09 - (Y/N)
LOGICAL10 - (Y/N)
CODE01 - code field 1
CODE02 - code field 2

CODE03 - code field 3
CODE04 - code field 4
CODE05 - code field 5
CODE06 - code field 6
CODE07 - code field 7
CODE08 - code field 8
CODE09 - code field 9
CODE10 - code field 10
CODE11 - code field 11
CODE12 - code field 12
CODE13 - code field 13
CODE14 - code field 14
CODE15 - code field 15
CODE16 - code field 16
CODE17 - code field 17
CODE18 - code field 18
CODE19 - code field 19
CODE20 - code field 20
TEXT01 - text field 1
TEXT02 - text field 2
TEXT03 - text field 3
TEXT04 - text field 4
TEXT05 - text field 5
TEXT06 - text field 6
TEXT07 - text field 7
TEXT08 - text field 8
TEXT09 - text field 9
TEXT10 - text field 10
DATE01 - date field 1
DATE02 - date field 2
DATE03 - date field 3
DATE04 - date field 4
DATE05 - date field 5
DATE06 - date field 6
DATE07 - date field 7
DATE08 - date field 8
DATE09 - date field 9
DATE10 - date field 10
NUMBER01 - number field 1
NUMBER02 - number field 2
NUMBER03 - number field 3
NUMBER04 - number field 4
NUMBER05 - number field 5
NUMBER06 - number field 6
NUMBER07 - number field 7
NUMBER08 - number field 8
NUMBER09 - number field 9
NUMBER10 - number field 10

# 12    Reporting

## 12.1    Reports

### 12.1.1    Reports in General

The Volunteer Reporter includes over 100 separate reports, each of which can be limited, filtered, and sorted in several different ways. This enables you to get answers to almost any question you have about your volunteers and what they're doing. Every report can either be viewed on the screen, printed, or exported in various formats.
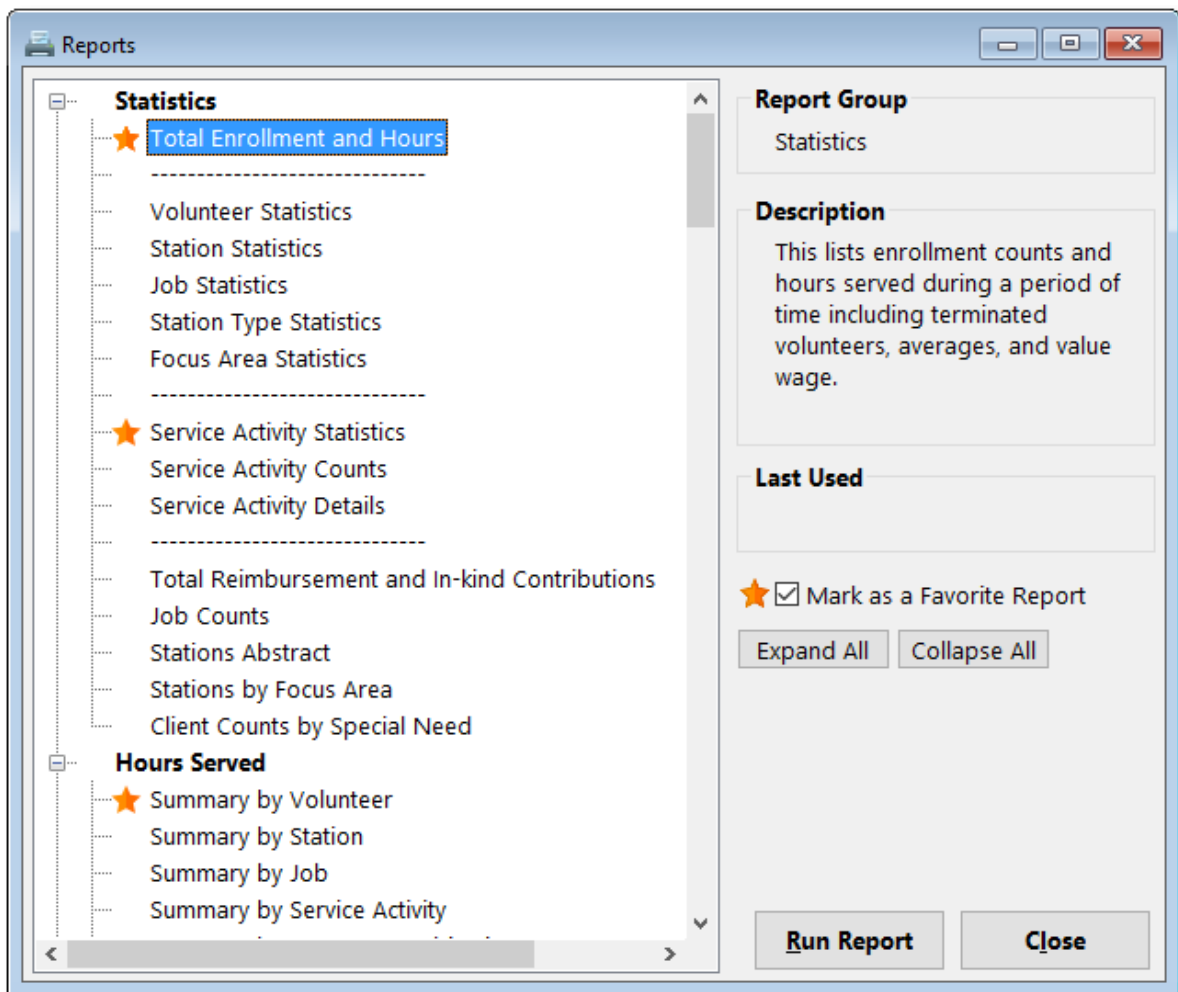


Click on a report to read a description of it. Mark any report as a favorite with a star which helps you find it again later. Open the report either by clicking on the **Run Report** button or by double clicking on it.

For each report, the program asks for limitations and options that enable you to get the specific information you want on the report. Just select the information you want and how you want it displayed from the drop down lists. Once you've made your selections and chosen an optional filter, you can either preview, print, or export the report.
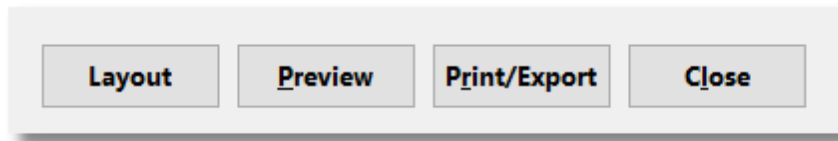
**Layout**
The Layout button enables you to adjust how the report is displayed including:
- An optional header and footer.
- Page number position.
- The option to print the date and time.
- The option to center the report headings or align them on the left margin.

In turn, these changes will be the default settings for later reports as well the current report.

**Preview**
When previewing a report, thumbnails of each page are displayed on the left side and the current page is shown on the right. Expand this window to its maximum size in order to enlarge the page. You can also drag the vertical divider between the two panels either left or right in order to devote more area to either panel. The buttons along the top of the preview screen enable you to jump to the first page, move back one page, move forward one page, jump to the last page, zoom in, zoom out, revert back to normal size, print one or all pages, and export the report to a file that you can then email.
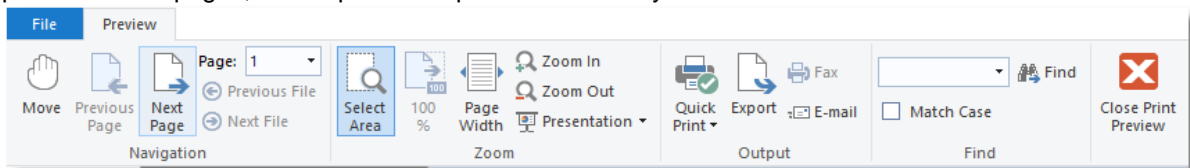


**Print/Export**
The Print/Export button enables you to print specific pages or the entire report, export the report as another file type, and email the report. When printing, you can select a specific printer, the starting page number, which pages to include, and how many copies to print.

To export or email, first select the export format from the drop down list.
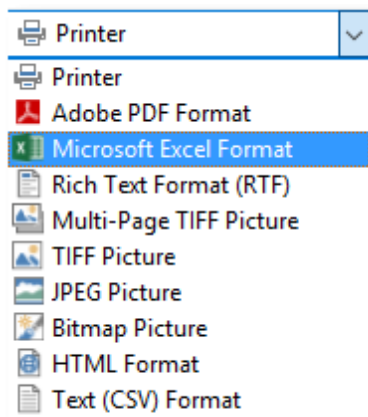


Adobe PDF -- This is the best format for emailing. It is a common format that most computers can read and understand. Please note that this file format cannot be edited as it is read-only.

Microsoft Excel -- This produces a spreadsheet document that can be opened and edited in Excel. By default, only the data will be exported. The column headings will not be exported, so be sure to print at least one page of the report in order to label the columns once you've opened the file in Excel.

Rich Text Format (RTF) -- This is a word processing document that can be opened by Word, WordPerfect, or any other word processor. Although the report's data will be in a table on every page, it isn't difficult to edit.

HTML -- This creates a web document that is opened by Internet Explorer or another browser. It is a common used format that every computer can understand and is a good choice for emailing reports, but not as good as PDF.

Bitmap, JPEG, Multi-TIFF, TIFF -- These files are all "pictures" of the report that cannot be edited. Most of these formats create a separate file for each page of the report. For example, the result for a twenty page report will be twenty separate files. Due to this, it may be useful for sharing just one page of a report with others.

Text -- This creates a comma delimited text file which is probably not very useful except in some unusual cases to export some data to another program.

For each export type there is a "Options" button located to the right of the drop-down list which enables you to set some (usually obscure) properties of the file type.

After choosing the export type, click on the Start button which opens the "Save As" screen. From here you can select where to save the exported file and change the default file name. In the lower left of this screen are two check boxes:
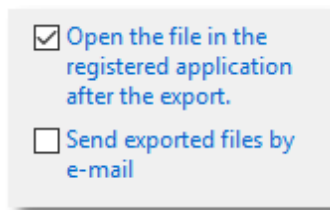


The first one is normally checked and tells the Reporter to not only create the exported file, but immediately open it so that you can view it. The second checkbox enables you to email the report. If it is checked, your email program will open with the exported file already attached to a blank email. Checking either of these checkboxes is optional and the Reporter will still export the report without either being checked. The exported report is saved as a file on your computer which you can open at a later time or attach to an email you create later.

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**Specific Reports**  (Not every report is mentioned)

**Statistics**

**Hours Served Reports**

**Volunteer Reports**

**Station Reports**

**Job Reports**

**Timesheets**

**Letters and Envelopes**

**DYMO Labels**

## 12.1.2 Statistics

These are very useful reports that give you a complete overview of your project. These reports give overall counts, totals, and percentages of your volunteers and their service broken down into every conceivable category.

Total Enrollment and Hours
This is a very concise two page listing of your volunteer service with detailed explanations of every number.

Impact Job Counts
This report includes only jobs marked as being impact jobs.

## 12.1.3 Hours Served Reports

These reports are affected by the Hours field called "Wants Reimbursement This Time?". If it is unchecked, that volunteer will have hours, but no reimbursement on this report. All their reimbursement will be counted as In-kind. On the Volunteer screen there is a default field for this same information.

Also, the Preferences section called "Reimbursement Limits" is used by these reports to determine how to split monies between reimbursement and in-kind donations.

Reimbursements
This report list the names, addresses, and reimbursement amounts of all volunteers needing to be reimbursed during a period of time. It does not include volunteers with zero reimbursement. The same information is included in the Reimbursements Merge File and the Reimbursements spreadsheet.

Reimbursements Merge File
This produces a comma-delimited merge file of names, addresses, and reimbursement amounts of volunteers needing to be reimbursed. You can import this file into an accounting program in order to print reimbursement checks.

The merge files are standard, comma-delimited text files where each field is surrounded by quotation marks and separated from the next field with a comma. Many, but not all, accounting programs will import this information. You'll need to reference your accounting program's manual to see if this is possible for you.

## 12.1.4 Volunteer Reports

**Addresses, Phones, Birthdays, and Ages Report**
In previous versions of the Reporter, you could print this report without addresses, just phones and birthdays. Instead, you can get the identical information on the report titled "Birthdays and Ages".

**Email Messages**

**Letters and Envelopes**
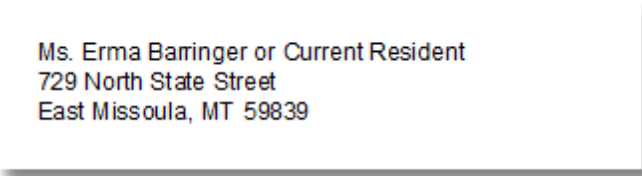
**Mailing Labels**

The name to include on labels can be either the mailing name field from the volunteers screen or a combination of the volunteer's salutation, first, and last names. You can also choose to print the last name first.

Formatting can be either "Postal Regulations" or "Personalized". Postal Regulations formatting is all upper case without any punctuation while Personalized is upper and lower case letters (as long as you have entered the data as upper and lower case) with a comma inserted between the city and state.

To prevent a volunteer from receiving a mailing label, edit the volunteer record and uncheck the field "Needs Mailing Label?". At the same time, you might want to edit the volunteer's spouse's record to change the field, "Mailing Name" to include both volunteers names as in "Mr. and Mrs. Jones". Then when printing labels, make sure the field "Only those marked as needing label" is checked.

An example of when you would want to uncheck the field "Only those marked as needing label" is when printing labels for upcoming birthdays. In that case you want to prepare labels for each individual with an upcoming birthday regardless of whether they are marked as needing a label or not.

Use the "Include Current Resident" check mark to include the phrase "or Current Resident" on the label.

Ms. Erma Barringer or Current Resident
729 North State Street
East Missoula, MT 59839

You can also limit every other report to just those volunteers needing a mailing label by using the normal report filters. For example, if  you want to prepare a merge file for only those volunteers needing a mailing label, you must use a filter where "Needs Mailing Label" is Yes.

**DYMO Labels**

**Merge File**

This produces a comma-delimited merge file of names and addresses that you can use in a word processor. With this you can merge a letter in your word processor with names and addresses from the Volunteer Reporter in order to send individually addressed letters to your volunteers.

The merge files are standard, comma-delimited text files where each field is surrounded by quotation marks and separated from the next field with a comma. Every word processor can use these files, but you'll need to refer to your particular word processor's manual to see how.

**Terminated Volunteers Report**

This report obviously includes all terminated volunteers, but every filter, by default, excludes terminated volunteers. So, if you include any filter with this report, it will come up blank without any records. In order to use a filter with this report, edit the filter and include terminated volunteers on the "Vol Codes" tab.

## 12.1.5  Station Reports

**Email Messages**

**Letters and Envelopes**

**Mailing Labels**
Formatting can be either "Postal Regulations" or "Personalized". Postal Regulations formatting is all upper case without any punctuation while Personalized is upper and lower case letters (as long as you have entered the data as upper and lower case) with a comma inserted between the city and state.

**Merge File**
This produces a comma-delimited merge file of names and addresses that you can use in a word processor. With this you can merge a letter in your word processor with names and addresses from the Volunteer Reporter in order to send individually addressed letters to your stations.

The merge files are standard, comma-delimited text files where each field is surrounded by quotation marks and separated from the next field with a comma. Every word processor can use these files, but you'll need to refer to your particular word processor's manual to see how.

## 12.1.6  Job Reports

**Email Messages**

**Letters and Envelopes**

Mailing Labels
Formatting can be either "Postal Regulations" or "Personalized". Postal Regulations formatting is all upper case without any punctuation while Personalized is upper and lower case letters (as long as you have entered the data as upper and lower case) with a comma inserted between the city and state.

Merge File
This produces a comma-delimited merge file of names and addresses that you can use in a word processor. With this you can merge a letter in your word processor with names and addresses from the Volunteer Reporter in order to send individually addressed letters to your stations.

The merge files are standard, comma-delimited text files where each field is surrounded by quotation marks and separated from the next field with a comma. Every word processor can use these files, but you'll need to refer to your particular word processor's manual to see how.

Job Descriptions
This prints a job description for several or all jobs at one time with each job on a separate page. You can also print this same report for a single job from the job screen.

Impact Job Statements
This prints an impact statement for all impact jobs at one time with each job on a separate page. You can also print this same report for a single job from the job screen.

Job Description List for Web
This special report creates a table of job descriptions in a form that can be dropped easily onto your web site. It creates a computer file in HTML format which is the language of the Internet.

| Job | Contact | Phone | Description |
|-----|---------|-------|-------------|
| American Red Cross | Joyce Hall | (217)774-4122 | RSVP volunteers will make calls Bloodmobile will be in the area a |
| Appalachia Project | Orris R. Gilles | (217)728-4098 | RSVP members will volunteer to for the Appalachia Project and w accordance with their abilities to |
| Arthur Home | Lilly Schmalzried | (217)543-2103 | RSVP volunteers will help within to do so by aaaisting with planne for seniors, providing transportat |

After you choose which job fields to include and apply any filters you'd like, the Reporter creates a file that contains all of the chosen job data. The data is in a table format. A web designer can easily copy and paste this information into your web site which enables you to update your web site with new job opportunities on a regular basis.

Since the table can be very wide, you can decide how you want it to display. If you choose to have the entire table show fully on anyone's computer, the result might be squeezed and cramped for some people with small monitors using large fonts. In most cases it will probably be better to create a table that is 1000-2000 pixels wide even though visitors to your web site will have to scroll right in order to see all of it.

You might choose to create several smaller tables of job listings instead of one large one. For example, you could create a table of "Administrative" jobs and another one for "Education" jobs. Create different filters based upon service categories, job skills, or a "user-defined" code in order to separate your jobs into categories. Your web designer can post these separate tables onto separate web pages under the corresponding titles.

Documents on the web do not normally display indented paragraphs. Because of this limitation, any paragraph indents in your job descriptions won't translate to the final web file. You should separate paragraphs in your job descriptions by a blank line so they display clearly on the web.

### 12.1.7  Timesheets

Timesheets are a special type of report that include pre-printed names on a form that a volunteer or supervisor can use to record the hours served by a volunteer during a month. At the end of the month, you can use these completed timesheets as the data entry forms for entering hours into the Reporter.

The Reporter includes three different types of timesheets with almost unlimited flexibility. You should be able to find a timesheet that meets your needs.

**Pre-Made Timesheets**  These are the easiest to use, but offer the least customization. Examples are "Timesheet by Volunteer" and Timesheet by Job".

**Do-It-Yourself Timesheets**  These allow quite a bit of customization, but are still structured and don't meet the needs of everyone.

**Word Timesheets**  Go wild and design exactly what you want using Microsoft Word in combination with the Reporter. You can do it all, but not without some practice and false starts. We try to help with samples and explanations, but these are not for the faint of heart.

All the different timesheets take into account the starting and ending dates for volunteers and jobs. If either is not active as of the date of the report, they won't be included on the report. This is useful in order to put a temporary hold on either a volunteer or a job. For example, if a volunteer is going to be gone for a couple of months, terminate the volunteer during that time away so that the volunteer's name will not be printed on timesheets.

In addition, this report takes into account the volunteer field "Needs Timesheet". If the volunteer is marked as not needing a timesheet, then that volunteer's name will not be printed.

**Do-It-Yourself Timesheet**
This is more than just a single type of timesheet. It is an entire module that lets you design your own timesheet formats and then print them with your current volunteer information. It is similar to Filters in that you can design as many timesheets as you need and reuse them over and over again. Once you have designed a good timesheet layout, you can use it month after month.

To create a new timesheet, click Add and fill in all the fields. Each timesheet needs a unique name which describes it well. Base the layout on either one volunteer, job, or station per page. Enter information on every tab including the page header, what column headings to include and the page footer. During the design phase, use the "Sample" button often to see what it will look like and adjust your layout.

When you are pleased with the design, print the timesheets with the "Print" button just like any other report or timesheet.

**Word Timesheets**
This is an entirely different type of timesheet. You use Microsoft Word to create a timesheet template and then the Reporter will merge all of the data into the Word template to create a final timesheet. It is very powerful because you can use Word to design and format the template just like you want it and then let the Reporter fill in all the volunteers and jobs.

Overview
You probably know that Word enables you to merge a form letter with many names and addresses in order to prepare the same letter for each person. We use a variation of that theme to produce a custom timesheet for each volunteer, station, or job.

You design a blank timesheet in Word that contains your chosen layout and markers (merge codes) indicating where the names should appear. In the Reporter, you tell it to merge all the names (which can be filtered) into the timesheet you have designed. The Reporter then prepares a single timesheet for each volunteer, station, or job depending on how you designed it.

In the Reporter you can either prepare timesheets one at a time for any individual volunteer, station, or job by clicking on the Print button on the individual's screen, or you can prepare a batch of timesheets at once from the Reports menu.

| Descriptive Name | Vol | Job | Sta | Actual File Name |
|---|---|---|---|---|
| Sample Hours and Mileage by Job | | X | | Sample Hours and Mileage by Job.doc |
| Sample Hours and Mileage by Job (no Station) | | X | | Sample Hours and Mileage by Job (no Station).doc |
| Sample Hours and Mileage by Station | | | X | Sample Hours and Mileage by Station.doc |
| Sample Hours and Mileage by Station (no Jobs) | | | X | Sample Hours and Mileage by Station (no Jobs).doc |
| Sample Hours and Mileage by Volunteer | X | | | Sample Hours and Mileage by Volunteer.doc |
| Sample Hours and Mileage by Volunteer (no Jo | X | | | Sample Hours and Mileage by Volunteer (no Jobs).doc |
| Sample Hours and Mileage by Volunteer (no Sta | X | | | Sample Hours and Mileage by Volunteer (no Station).d |

Word Timesheets

Select a Timesheet Document   (create and edit these in Word)

Add   Edit   Delete   Open for Editing in Word

Placed as of  04/01/2018
Page Heading  Month of April
Filter  All Records

View   Print   Close

Viewing vs. Printing
In the Reporter you can choose to either view the timesheet (with all of the data inserted) or print it.

If you are preparing timesheets one at a time from either the volunteer, station, or job screen and you choose to view it, Word will be opened with the resulting merged timesheet on the screen. After you check it over, you can print it directly from Word. If you instead choose to print it from the Reporter by clicking on the Print button, it will go directly to the printer without opening Word.

However, if you are preparing a batch of timesheets by clicking on the Reports menu, you can only choose to view a sample and not all of the timesheets before printing. There is a quirk in Word that prevents us from opening Word with all of the prepared timesheets. If we tried to open Word with all of the timesheets shown, there would be no page break separating the timesheets. Instead all the pages would run together which would be unacceptable.

So for that reason, when preparing a batch of timesheets at once from the Reports menu, you can only view a sample (the first timesheet in the batch) or print them directly. You should probably prepare timesheets one a time until you are confident that your design works as you expect.

File Locations
Because the Reporter and Word have to work together in order to produce these timesheets, they must agree on the location of the files that are to be shared between them. You'll also want to share timesheets among the various users in your office so you want the files in a location that can be shared by everyone.

By default, the Reporter puts these files in a subfolder of your shared data folder called "Shared Documents". For example, if your shared data is on drive F: in a folder called "F:\reporter\data", these

files will be in "F:\reporter\data\Shared Documents". Click on Help | About the Reporter to view the location for these shared files.

<u>Tables</u>
You'll notice that all of the sample Word timesheets that we supply use tables extensively. You don't technically need to use a table in a timesheet, but it's the only way to get columns and rows of blank spaces waiting to be filled in with hours and reimbursements. When using a table, create it to just fill one page and then it will be repeated automatically as many times as needed for each merge.

Make sure to leave enough space for the data in the table. Remember that some volunteers, stations, and jobs have long names. Either make the rows tall enough to allow the names to wrap to a second line in the cell, or use a small font for the merged data.

<u>Designing Tips</u>
The best way to understand this is to study and refer to the samples we provide. Find a sample that is close to what you want and then modify it. Remember to "Save As" a new document in order to preserve the original.

When designing a timesheet, first decide whether you want it by volunteer, job, or station. If designing by volunteer, you'll have just one volunteer at the top of every page and then all the jobs or stations for each volunteer listed in a table. Similarly, if designing by station, you'll have just one station printed at the top of every page with all of the volunteers listed in a table.

Next you'll pick a data source. We've supplied three data sources to be used during the design. They are **VolunteerData.vrd**, **StationData.vrd**, and **JobData.vrd**. You must use one of these three files as the data source. If you are designing a timesheet by volunteer use VolunteerData.vrd, by station use StationData.vrd, and by job use JobData.vrd. These data sources contain all of the available fields and are used only during the design phase. When you actually prepare the timesheet from within the Reporter, the correct data source will be substituted. In order for the data source substitution to work correctly, you must use one of the three data source files that we supply.

<u>Merge Codes</u>
This is not a normal type of merge because we are including many names on a single page. Remember, a typical merge starts a new page for every record like a new letter for every person. Here, however, we want ten or twenty volunteers or jobs all listed on one page and only start a new page when the first one is filled. It's not hard to do, it's just a little different.

The trick is to use the <<Next Record>> merge code which is also sometimes referred to in Word as the <<Next>> merge code. When you look at the sample timesheets you see that we use the <<Next Record>> merge code extensively in the tables. It tells Word to grab the next record of information without starting a new page.

Follow these rules for using the <<Next Record>> merge code:
1. Use it only in the table.
2. Don't use it on the first row of the table.
3. Use it on every following row.
4. It must always be the first code in the row.

In the samples you'll see that the first row of a table might contain the field:
<<VFIRSTLAST>>

but every other row has the fields
<<Next Record>><<VFIRSTLAST>>

This tells Word to put the first volunteer's name in the first row, then skip to the next record before inserting the volunteer's name on every other row. If you follow these simple rules you'll never get any duplicate names and will never skip any names.

<u>Available Merge Fields</u>
All of these fields are available for every Word timesheet although It would be almost impossible to use them all on a single timesheet. A timesheet is normally divided into two main sections, the page heading area and the table. In the page heading you will insert merge fields about either the station, job, or volunteer that will be printed just once at the top of every page. For example, if you are designing a timesheet with all volunteers listed for each station, you'll include the station name, contact, and phone number in the page heading.

In the table, you will probably insert just merge fields about each individual. Using the same example of a timesheet designed for a single station, the table will contain just the volunteer's names. All the other volunteer fields won't be used in this example.

MONTHOF - a heading like "Month of April" which is set every time you run the timesheet.

Volunteer Codes:
VNO - number
VFIRSTLAST - first and last name or group name if it is a group
VLASTFIRST - last name, first name or group name if it is a group.
VSALUTE - salutation
VFIRST - first name
VLAST - last name
VADDR1 - first street address
VADDR2 - second street address
VCITYSTZIP - city, state, and zip
VCITY - city
VSTATE - state
VZIP - zip
VCOUNTRY - country
VPHHM - home phone
VPHWK - work phone
VCELL - cell phone
VPHOTH - other phone
VPHONE4 - fourth phone
VPHONE5 - fifth phone
VEMAIL - email address

Station Codes:
SNO - number
SNAME - station name
SADDR1 - first street address
SADDR2 - second street address
SCITYSTZIP - city, state, and zip
SCITY - city
SSTATE - state
SZIP - zip
SCOUNTRY - country
SPHONE - phone
SFAX - fax

SPHOTH - other phone
SWEB - web address
SFIRSTLAST – Contact 1's first and last names
SLASTFIRST – Contact 1's last and first names.
SSALUTE – Contact 1's salutation.
SFIRST – Contact 1's first name.
SLAST – Contact 1's last name.
STITLE – Contact 1's title.
SEMAIL – Contact 1's email address
SCELL – Contact 1's cell phone.
SFIRSTLAST2 – Contact 2's first and last names
SLASTFIRST2 – Contact 2's last and first names.
SSALUTE2 – Contact 2's salutation.
SFIRST2 – Contact 2's first name.
SLAST2 – Contact 2's last name.
STITLE2 – Contact 2's title.
SEMAIL2 – Contact 2's email address
SCELL2 – Contact 2's cell phone.

Job Codes:
JNO - number
JNAME - job name
JISCLIENT - individual client (Y/N)
JCLFIRSTLAST – Client's first and last names
JCLLASTFIRST – Client's last and first names.
JCLNAME1 – Client's first name.
JCLNAME2 – Client's last name.
JADDR1 - first street address of station
JADDR2 - second street address of station
JCITYSTZIP - city, state, and zip of station
JCITY - city of station
JSTATE - state of station
JZIP - zip of station
JCOUNTRY - country of station
JPHONE - phone
JPHOTH - other
JFIRSTLAST – Contact 1's first and last names
JLASTFIRST – Contact 1's last and first names.
JSALUTE – Contact 1's salutation.
JFIRST – Contact 1's first name.
JLAST – Contact 1's last name.
JTITLE – Contact 1's title.
JEMAIL – Contact 1's email address
JCELL – Contact 1's cell phone.
JFIRSTLAST2 – Contact 2's first and last names
JLASTFIRST2 – Contact 2's last and first names.
JSALUTE2 – Contact 2's salutation.
JFIRST2 – Contact 2's first name.
JLAST2 – Contact 2's last name.
JTITLE2 – Contact 2's title.
JEMAIL2 – Contact 2's email address
JCELL2 – Contact 2's cell phone.

<u>Page Numbering</u>
This is a little tricky, but not hard. Normal page numbering in Word won't work because Word numbers every merged page as page one. We don't know why and it doesn't make sense to us, but that's the way it is. However, Word refers to every page as a new "section" and we can use the section number as a perfectly good replacement for a page number.

1. The section number must be in either a header or footer, not the main document. It won't work unless it is in either a header or footer. Again, we don't know why.

2. Insert the field "Section" into either the header or footer. You can format it like any other character (font, size, bold, etc.), you can align it to the left or right, and you can add other text like the word "Page". To insert the section field, first open the header or footer (**View | Header and Footer**), then click **Insert | Field | Section** to insert the field named "Section". It will be inserted as the number one, but during the merge it will advance correctly for every page.

## 12.1.8  Letters and Envelopes

The Reporter enables you to print form letters for individual volunteers, stations, and jobs as well as for a group of each at one time. You create the form letters in Microsoft Word and then merge the data into the form letter automatically. You can also produce envelopes this way as well as any other document where only a single volunteer's, station's, or job's information is printed on each page.

**Overview**
You design a blank letter in Word that contains your chosen layout and markers (merge codes) indicating where the names should appear. In the Reporter, you tell it to merge all the names (which can be filtered) into the letter you have designed. The Reporter then prepares a single letter for each record.

In the Reporter you can either prepare letters one at a time for any individual volunteer, station, or job by clicking on the Print button on the individual's screen, or you can prepare a batch of letters at once from the Reports menu.

**File Locations**
Because the Reporter and Word have to work together in order to produce these letters, they must agree on the location of the files that are to be shared between them. You'll also want to share letters among the various users in your office so you want the files in a location that can be shared by everyone.

By default, the Reporter puts these files in a subfolder of your data folder called "Shared Documents". For example, if your shared data is on drive F: in a folder called "F:\reporter\data", these files will be in "F:\reporter\data\Shared Documents". Click on Help | About the Reporter to view the location for these shared files.

**Samples**
We supply several sample letters and envelopes for you to study and experiment with. Find a sample that is close to what you want and then modify it. Remember to "Save As" a new document in order to preserve the original.

When designing a letter for volunteers, use the **LetterVolunteerData.vrd** file as a data source. Use **LetterStationData.vrd** as a data source when designing letters for stations, and **LetterJobData.vrd** for jobs. The actual names will be inserted by the Reporter, but in order for the data source substitution to work correctly, you must use the data source that we supply when you design your letter.
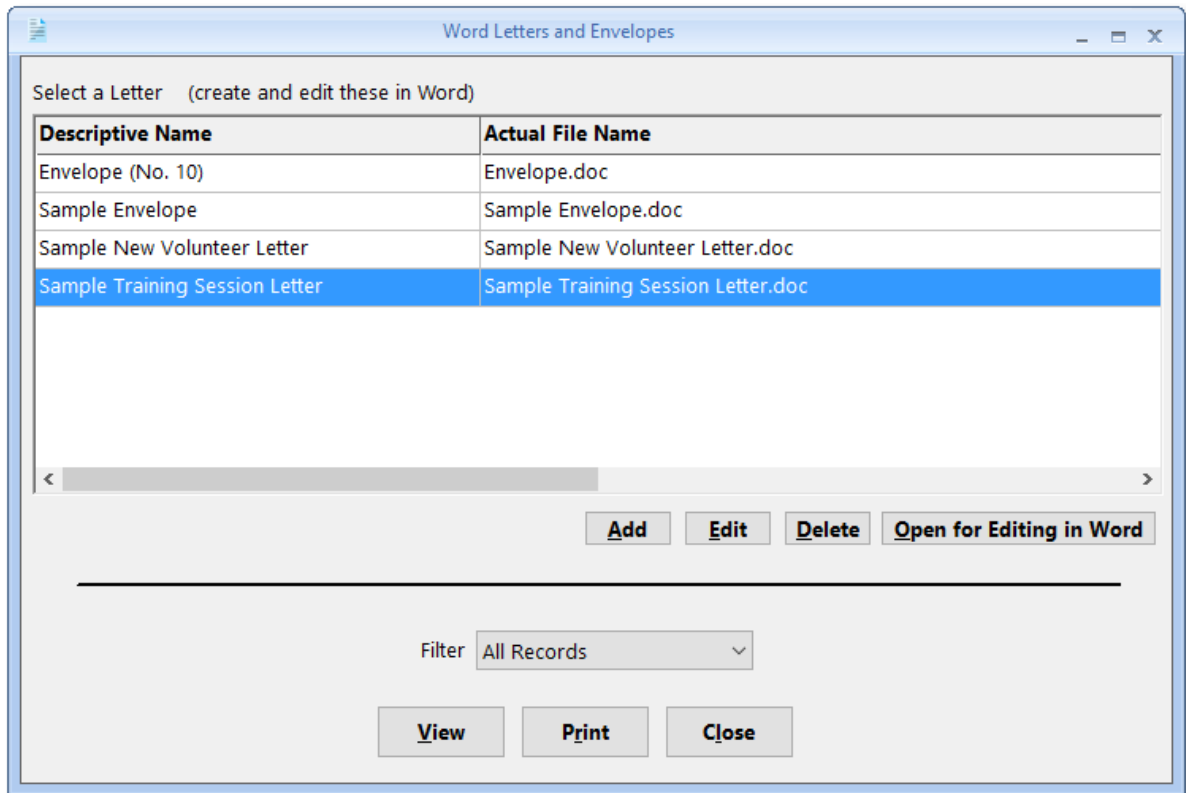
### How to Create Your First Letter

1. Always start with one of our sample letters. It's easier to remove unwanted text from a sample than to start from scratch. Highlight a sample letter on the **Word Letters and Envelopes** screen and click on **Open for Editing in Word**.

2. In Word, rename the sample to become your own letter. **Click on File | Save As** and give it a new name. It must remain in the Shared Documents folder. Leave the extension as .doc.

3. The data source will already be opened as long as you start with one of our sample letters. If not, select a data source to use while designing the letter. Different versions of Word do this in slightly different ways, but in general you go through the **Tools** menu to either a Mail Merge wizard or toolbar. Either will enable you to "Open a Data Source". Select the data source listed at the top of the sample letter. Usually this will be **LetterVolunteerData.vrd** which is also located in the Shared Documents folder. By selecting this data source, you ensure the data will match exactly when you perform the actual merge from the Reporter. The data source consists of just a few sample records that you can use to design your letter. Your real data will be inserted later when performing the merge from the Reporter.

4. Make any changes you want to the letter. Remove the sample text and insert your own.

5. Insert merge fields in the appropriate locations. In most versions of Word, click on the toolbutton to **Insert Merge Field**.

6. Test merge your letter with the sample data. Click on the **Merge** toolbutton.

7. Save your new letter and exit from Word.

8. Back in the Reporter, add your new letter to the list of available letters. Click on the **Add** button on the **Word Letters and Envelopes** screen. Give it a descriptive file name which can be anything and then the actual file name you saved it as in Word. The samples we supply use the same name for both descriptive and actual, but there's no reason to do that for your real letters.

9. Try out your finished product. Click on **View** to open Word with your data merged with your new letter.

**Available Merge Fields**
All of these fields are available for every Word letter.

Volunteer Codes:
NO - number
FIRSTLAST - first and last name or group name if it is a group
LASTFIRST - last name, first name or group name if it is a group.
MAILNAME - mailing name
SALUTE - salutation
FIRST - first name
LAST - last name
ADDR1 - first street address
ADDR2 - second street address
CITYSTZIP - city, state, and zip
CITY - city
STATE - state
ZIP - zip
COUNTRY - country
PHHM - home phone
PHWK - work phone
CELL - cell phone
PHOTH - other phone
PHONE4 - fourth phone
PHONE5 - fifth phone
EMAIL - email address
STARTSHORT - starting date in a short format like 04/06/2002
STARTLONG - starting date in a long format like April 6, 2002
ENDDTSHORT - terminated date in a short format like 04/06/2002
ENDDTLONG - terminated date in a long format like April 6, 2002
ENDCAUSE - termination cause
SERVEDTIME - years and months of service as of today
DOBSHORT- birth date in a short format like 04/06/2002
DOBLONG - birth date in a long format like April 6, 2002
AGE - age as of today
SEX - M/F
ETHNIC - ethnicity
RACIAL - racial group
DISABLED - person with disability (Y/N)
DRLICENSE - driver's license
DRLICEXP - driver's license expiration in a short format
SSNUMBER - social security number
ISVETERAN - is this a veteran?

LIFEPLEDGES - lifetime pledges
LIFEDONATIONS - lifetime donations
LIFEHOURS - lifetime hours
WANTSPAY - wants reimbursement (Y/N)
TIMESHEET - needs timesheet (Y/N)
NEEDSLABEL - needs mailing label (Y/N)
ISSTIPEND - stipended volunteer?
OVERINCOME - Turned away as over income?
UNDER60 - Turned away as under 60?
SCLEADER - Senior Companion Leader?
SCFROMSCL - Senior Companion Recruited by a Senior Companion Leader?
VOLFROMSCL - Community Volunteer Recruited by a Senior Companion Leader?
LOGICAL01 - (Y/N)
LOGICAL02 - (Y/N)
LOGICAL03 - (Y/N)
LOGICAL04 - (Y/N)
LOGICAL05 - (Y/N)
LOGICAL06 - (Y/N)
LOGICAL07 - (Y/N)
LOGICAL08 - (Y/N)
LOGICAL09 - (Y/N)
LOGICAL10 - (Y/N)
CODE01 - code field 1
CODE02 - code field 2
CODE03 - code field 3
CODE04 - code field 4
CODE05 - code field 5
CODE06 - code field 6
CODE07 - code field 7
CODE08 - code field 8
CODE09 - code field 9
CODE10 - code field 10
CODE11 - code field 11
CODE12 - code field 12
CODE13 - code field 13
CODE14 - code field 14
CODE15 - code field 15
CODE16 - code field 16
CODE17 - code field 17
CODE18 - code field 18
CODE19 - code field 19
CODE20 - code field 20
TEXT01 - text field 1
TEXT02 - text field 2
TEXT03 - text field 3
TEXT04 - text field 4
TEXT05 - text field 5
TEXT06 - text field 6
TEXT07 - text field 7
TEXT08 - text field 8
TEXT09 - text field 9
TEXT10 - text field 10
DATE01 - date field 1

DATE02 - date field 2
DATE03 - date field 3
DATE04 - date field 4
DATE05 - date field 5
DATE06 - date field 6
DATE07 - date field 7
DATE08 - date field 8
DATE09 - date field 9
DATE10 - date field 10
NUMBER01 - number field 1
NUMBER02 - number field 2
NUMBER03 - number field 3
NUMBER04 - number field 4
NUMBER05 - number field 5
NUMBER06 - number field 6
NUMBER07 - number field 7
NUMBER08 - number field 8
NUMBER09 - number field 9
NUMBER10 - number field 10

Station Codes:
NO - number
STATION - station name
ADDR1 - first street address
ADDR2 - second street address
CITYSTZIP - city, state, and zip
CITY - city
STATE - state
ZIP - zip
COUNTRY - country
PHONE - phone
FAX - fax
PHOTH - other phone
WEB - web address
FIRSTLAST – Contact 1's first and last names
LASTFIRST – Contact 1's last and first names.
SALUTE – Contact 1's salutation.
FIRST – Contact 1's first name.
LAST – Contact 1's last name.
TITLE – Contact 1's title.
EMAIL – Contact 1's email address
CELL – Contact 1's cell phone.
FIRSTLAST2 – Contact 2's first and last names
LASTFIRST2 – Contact 2's last and first names.
SALUTE2 – Contact 2's salutation.
FIRST2 – Contact 2's first name.
LAST2 – Contact 2's last name.
TITLE2 – Contact 2's title.
EMAIL2 – Contact 2's email address
CELL2 – Contact 2's cell phone.
MOUSHORT - memorandum of understanding originally signed date in a short format like 04/06/2002
MOULONG - memorandum of understanding originally signed date in a long format like April 6, 2002
RENEWSHORT - memorandum of understanding last renewed date in a short format like 04/06/2002

RENEWLONG - memorandum of understanding last renewed date in a long format like April 6, 2002
DUESHORT - memorandum of understanding next renewal date in a short format like 04/06/2002
DUELONG - memorandum of understanding next renewal date in a long format like April 6, 2002
ENDDTSHORT - terminated date in a short format like 04/06/2002
ENDDTLONG - terminated date in a long format like April 6, 2002
STATYPE - station type
HEALTHCARE - health care facility (Y/N)
ISFAITHBAS - faith-based station (Y/N)
ISDISASTER - disaster services station (Y/N)
NEEDSLABEL - needs mailing label (Y/N)
LOGICAL01 - (Y/N)
LOGICAL02 - (Y/N)
LOGICAL03 - (Y/N)
LOGICAL04 - (Y/N)
LOGICAL05 - (Y/N)
LOGICAL06 - (Y/N)
LOGICAL07 - (Y/N)
LOGICAL08 - (Y/N)
LOGICAL09 - (Y/N)
LOGICAL10 - (Y/N)
CODE01 - code field 1
CODE02 - code field 2
CODE03 - code field 3
CODE04 - code field 4
CODE05 - code field 5
CODE06 - code field 6
CODE07 - code field 7
CODE08 - code field 8
CODE09 - code field 9
CODE10 - code field 10
CODE11 - code field 11
CODE12 - code field 12
CODE13 - code field 13
CODE14 - code field 14
CODE15 - code field 15
CODE16 - code field 16
CODE17 - code field 17
CODE18 - code field 18
CODE19 - code field 19
CODE20 - code field 20
TEXT01 - text field 1
TEXT02 - text field 2
TEXT03 - text field 3
TEXT04 - text field 4
TEXT05 - text field 5
TEXT06 - text field 6
TEXT07 - text field 7
TEXT08 - text field 8
TEXT09 - text field 9
TEXT10 - text field 10
DATE01 - date field 1
DATE02 - date field 2
DATE03 - date field 3

DATE04 - date field 4
DATE05 - date field 5
DATE06 - date field 6
DATE07 - date field 7
DATE08 - date field 8
DATE09 - date field 9
DATE10 - date field 10
NUMBER01 - number field 1
NUMBER02 - number field 2
NUMBER03 - number field 3
NUMBER04 - number field 4
NUMBER05 - number field 5
NUMBER06 - number field 6
NUMBER07 - number field 7
NUMBER08 - number field 8
NUMBER09 - number field 9
NUMBER10 - number field 10

Job Codes:
NO - number
JOB - job name
ISCLIENT - individual client (Y/N)
CLFIRSTLAST – Client's first and last names
CLLASTFIRST – Client's last and first names.
CLNAME1 – Client's first name.
CLNAME2 – Client's last name.
STATION - station name
ADDR1 - first street address of station
ADDR2 - second street address of station
CITYSTZIP - city, state, and zip of station
CITY - city of station
STATE - state of station
ZIP - zip of station
COUNTRY - country of station
PHONE - phone
PHOTH - other
FIRSTLAST – Contact 1's first and last names
LASTFIRST – Contact 1's last and first names.
SALUTE – Contact 1's salutation.
FIRST – Contact 1's first name.
LAST – Contact 1's last name.
TITLE – Contact 1's title.
EMAIL – Contact 1's email address
CELL – Contact 1's cell phone.
FIRSTLAST2 – Contact 2's first and last names
LASTFIRST2 – Contact 2's last and first names.
SALUTE2 – Contact 2's salutation.
FIRST2 – Contact 2's first name.
LAST2 – Contact 2's last name.
TITLE2 – Contact 2's title.
EMAIL2 – Contact 2's email address
CELL2 – Contact 2's cell phone.
STARTSHORT - starting date of the job in a short format like 04/06/2002

STARTLONG - starting date of the job in a long format like April 6, 2002
ENDDTSHORT - terminated date in a short format like 04/06/2002
ENDDTLONG - terminated date in a long format like April 6, 2002
REQUESTED - number of volunteer requested
FILLED - number of volunteers currently placed here
VALUEWAGE - value wage
STIPENDED - Is this a stipend job?
STIPENDRATE - The stipend rate.
ISVETERAN - works with veterans (Y/N)
SERVICECAT - service category
FOCUSAREA - focus area objective
SERVEACT - service activity
SPECIALNEED - special need of the client or job.
DOBSHORT - date of birth of the client in a short format like 04/06/2002
DOBLONG - date of birth of the client in a long format like April 6, 2002
AGE - age of the client
SEX - sex of the client
ISPRIVATEHOME - is it a private home?
MOBILIZES - do volunteers at this job mobilize other volunteers?
MOBILIZECOUNT - number of volunteers mobilized
PRISONCHILDCOUNT - number of children of prisioners served
FOSTERCHILDCOUNT - number of foster care children served
MENTOREDCOUNT - number of children mentored
EXOFFENDERCOUNT - number of adult ex-offenders served
IMMIGRANTCOUNT - number of immigrants served
INDEPENDENTCOUNT - number of seniors receiving independent living services
RESPITECOUNT - number of caregivers provided with restpite
LOGICAL01 - (Y/N)
LOGICAL02 - (Y/N)
LOGICAL03 - (Y/N)
LOGICAL04 - (Y/N)
LOGICAL05 - (Y/N)
LOGICAL06 - (Y/N)
LOGICAL07 - (Y/N)
LOGICAL08 - (Y/N)
LOGICAL09 - (Y/N)
LOGICAL10 - (Y/N)
CODE01 - code field 1
CODE02 - code field 2
CODE03 - code field 3
CODE04 - code field 4
CODE05 - code field 5
CODE06 - code field 6
CODE07 - code field 7
CODE08 - code field 8
CODE09 - code field 9
CODE10 - code field 10
CODE11 - code field 11
CODE12 - code field 12
CODE13 - code field 13
CODE14 - code field 14
CODE15 - code field 15
CODE16 - code field 16

CODE17 - code field 17
CODE18 - code field 18
CODE19 - code field 19
CODE20 - code field 20
TEXT01 - text field 1
TEXT02 - text field 2
TEXT03 - text field 3
TEXT04 - text field 4
TEXT05 - text field 5
TEXT06 - text field 6
TEXT07 - text field 7
TEXT08 - text field 8
TEXT09 - text field 9
TEXT10 - text field 10
DATE01 - date field 1
DATE02 - date field 2
DATE03 - date field 3
DATE04 - date field 4
DATE05 - date field 5
DATE06 - date field 6
DATE07 - date field 7
DATE08 - date field 8
DATE09 - date field 9
DATE10 - date field 10
NUMBER01 - number field 1
NUMBER02 - number field 2
NUMBER03 - number field 3
NUMBER04 - number field 4
NUMBER05 - number field 5
NUMBER06 - number field 6
NUMBER07 - number field 7
NUMBER08 - number field 8
NUMBER09 - number field 9
NUMBER10 - number field 10

### 12.1.9 DYMO Labels

DYMO (www.dymo.com) makes several specialized label printers called LabelWriters. They only print on special label stock that comes on rolls. These label printers can be handy for printing single labels and also for larger label runs.

The Reporter enables you to print either single mailing labels or full label runs on any DYMO label printer.

If you are running the Reporter on Windows 10, you need the most recent version of the **Dymo Label Software**, version 8.5.3 or later. You can download this software for free from the Dymo website.

Do not install **Dymo Connect**. On their website, Dymo lists **Dymo Connect** as their current software, but it won't work with the Reporter. **Dymo Label Software** is still available and is still being kept up to date by Dymo. It works perfectly with the Reporter.

**Single Labels**

To print a single label for a volunteer, station, or job, click on the DYMO button on the toolbar or click on **Edit | Print DYMO Label**. These options will only be available if a DYMO LabelWriter is installed on your computer.

On the DYMO LabelWriter screen, select which label you are using and where to print a Postnet barcode. Click on the **Print** button to print the label immediately or click on the **Open DYMO** button to open the Dymo LabelWriter Software where you can make more changes before printing.



**Full Label Print Jobs**

To print mailing labels for groups of volunteers, stations, or jobs, open the normal Mailing Labels Report from the Reports menu. Normally, the Reporter will print these labels to a full-page printer, but you can choose to print them on your DYMO LabelWriter by selecting the Printer Type.

After changing the printer type to your Dymo printer, select which label you are using and where to print the Postnet barcode. When you click on Print, all the labels will be sent to the DYMO LabelWriter.

You cannot preview labels after selecting the DYMO LabelWriter as your printer.

Don't try to print any other report to the DYMO LabelWriter or you'll get very unusual results.

## 12.2 Spreadsheets

This enables you to create Excel spreadsheets containing your data. The process is simple and flexible allowing you to use your data in Excel in order to perform any manipulations with your data.

The process is also very safe since it is a one-way only process. You cannot import data from Excel into the Volunteer Reporter, only export it from the Reporter into Excel. The Volunteer Reporter has many built-in checks and balances to assure that your data is always accurate so you'll always use the Reporter to add and edit data, but you can use Excel to manipulate a copy of your data for even more power.
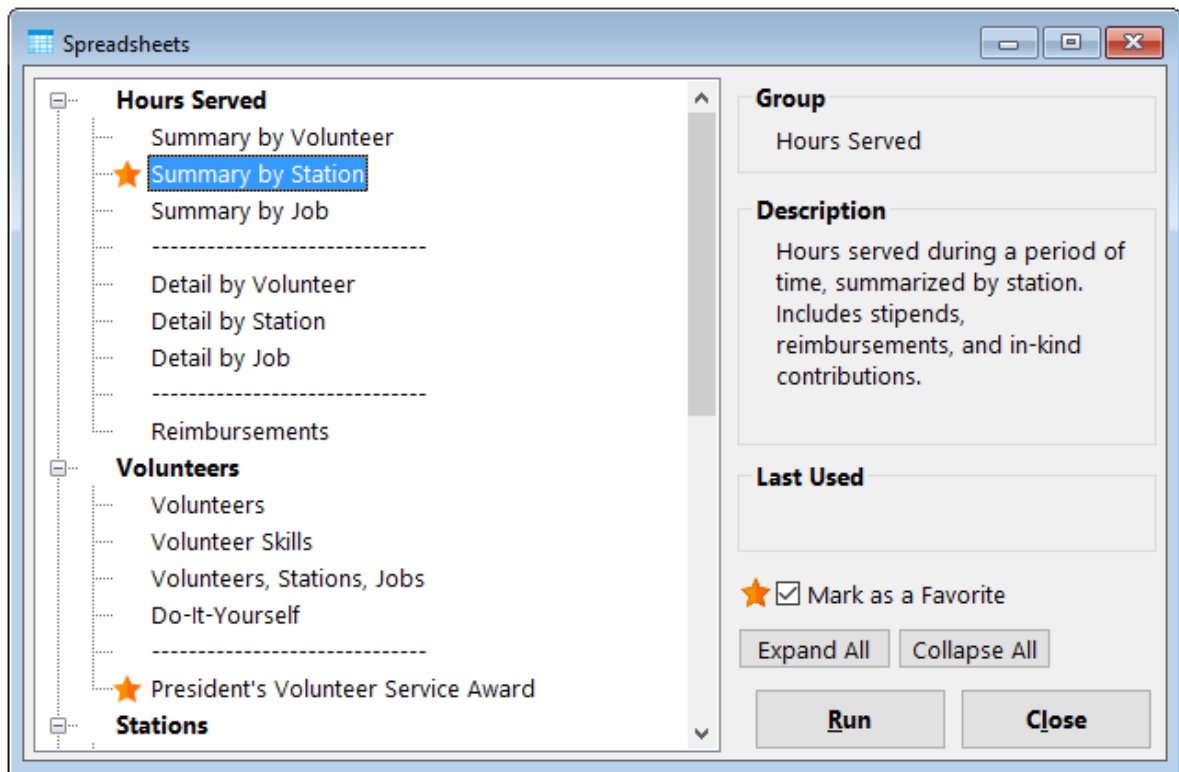


Click on a spreadsheet to read a description of it. Mark any as a favorite with a star which helps you find it again later. Open it either by clicking on the **Run** button or by double clicking on it.

When you prepare a spreadsheet, it is just as if you are printing a report except that the report data ends up in Excel instead of on a piece of paper. With the data in Excel you can sort it any way you want and print other reports that we've never thought of. Another big difference between spreadsheets and reports is that spreadsheets include much more data for each record. For example, a spreadsheet of volunteers includes every volunteer field! That's more data than could ever fit on a piece of paper.

The process of creating a spreadsheet is very straightforward although it can be rather slow because of the large quantities of data being prepared. Once the spreadsheet is prepared, Excel automatically starts with the spreadsheet already loaded. This is a copy of your data and you can manipulate and save it just as you would any spreadsheet.

Sorry, but we can't supply technical support on how to use Excel.

**Do-It-Yourself Spreadsheets**
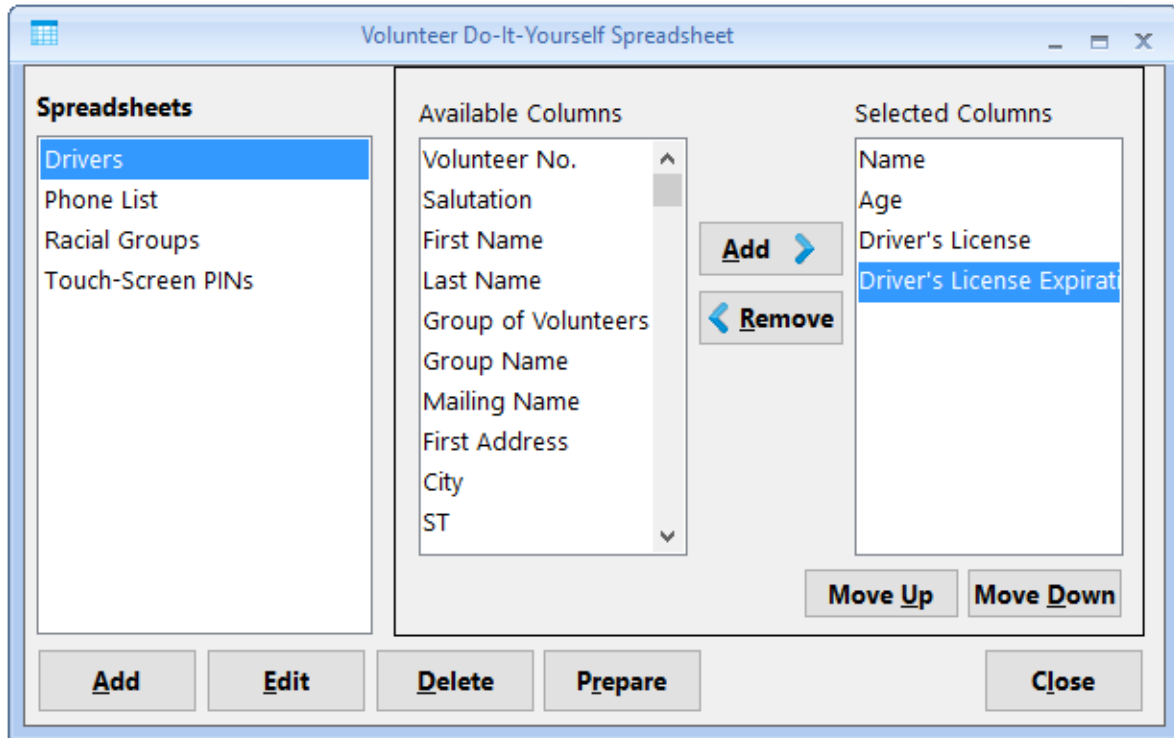


You can create any number of custom spreadsheets for volunteers, stations, or job. Give your new spreadsheet a unique name and move any columns into it. You can also rearrange the columns by moving them up or down in the list. After you have all the information you want included, click on **Prepare SS** to create the spreadsheet in Excel. Just like Filters, Do-It-Yourself Spreadsheets are shared among everyone in your office.

*Tip:* Remember that when you choose columns to include, you are not deciding which records to include. You do that with a Filter. For example, if you want a spreadsheet of just drivers, first you include the appropriate fields like drivers license and expiration date, then when you prepare the spreadsheet, you need to use a filter that will only include those volunteers who actually have drivers licenses. Otherwise, you'll get everyone whether they have a drivers license or not.

## 12.3  Filters

Filters limit which records are shown and printed on reports. A simple example is a filter which includes only men. Once we create such a filter, we can use it when looking at our volunteer data or when printing any report or spreadsheet.

Filters are very powerful for several reasons. They are reusable -- often you can use the same filter month after month either with no change or with a small change to update it with new dates. Filters also can be shared among everyone using the Reporter.  Once you create a good filter, it can be used by everyone. In addition, the same filter can be used anywhere in the Reporter. You can create one filter and use it when viewing a report on the screen, when printing mailing labels, and when preparing a spreadsheet.

There are two parts to using filters -- creating the filter and using the filter.

**Creating Filters**
To add or edit a filter select "Filters" from the top menu or click on the Filter icon (funnel) on the toolbar.
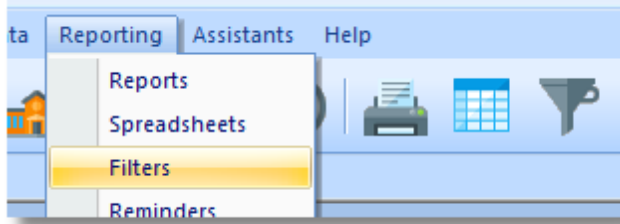


Every filter must have a name, but the name can be anything which describes the filter. Every filter can have a lot of different limitations. Try to use as few limitations as possible. Usually only one or two limitations will produce your desired results and not slow down the processing with unnecessary filtering. Double click on a limitation in order to set it.
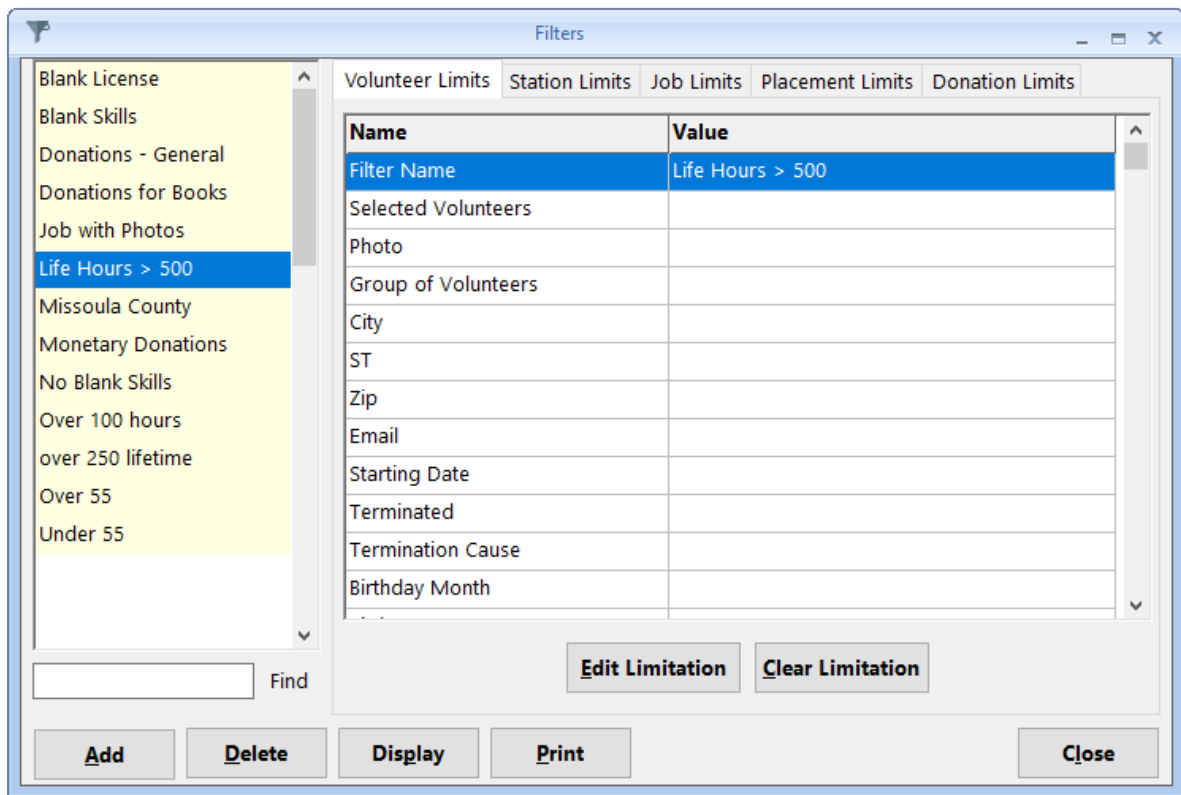
Also be sure to not cancel out one limitation with another. For example, if you ask to include only volunteers with certain zip codes and also ask for only volunteers in a particular county, but those zip codes are not located in that county, the Volunteer Reporter will produce a blank report.

Remember, a filter does not modify what will be shown on a report, it only limits which records will be shown on the report. For example, the report showing birth dates will always show birth dates no matter what limitations are in the filter. A filter will only limit which people are shown on the birth date list.

A filter needs only one or two limitations to work well, almost never more than four.

Filters are very powerful, but they can't do everything. Each limitation on a filter is considered individually from every other limitation. For example, you can include a limitation of just people who served at a particular job and you can also include a limitation of just people who served a certain number of hours during a period of time, but the filter will not combine the two in order to include just people who served a certain number of hours at a single job. Instead, it will include anyone who served at that job and who also served that certain number of hours, even if those hours were served at a different job.

**Using Filters**
On every report and spreadsheet is a field showing the current filter. Normally the filter is "All Records" which means that all records will be included on the report. To use a filter, select it instead of "All Records" and it will automatically be used. Only records meeting the limitations included in that filter will be shown. This all happens automatically -- you don't have to do anything except select the filter.
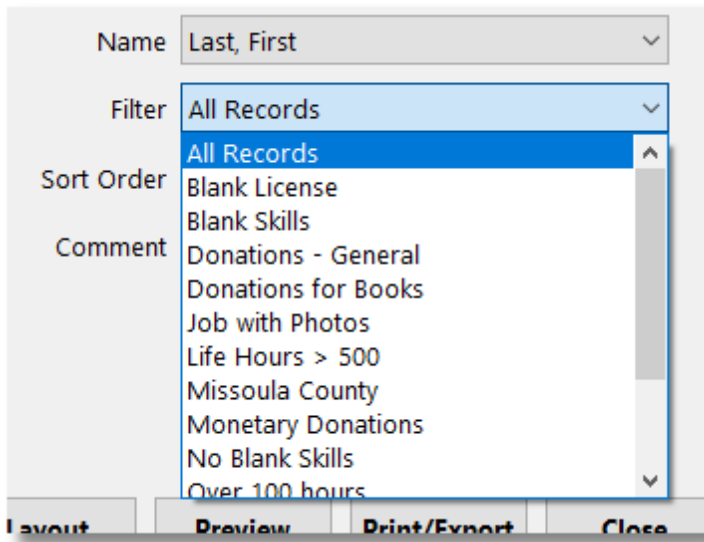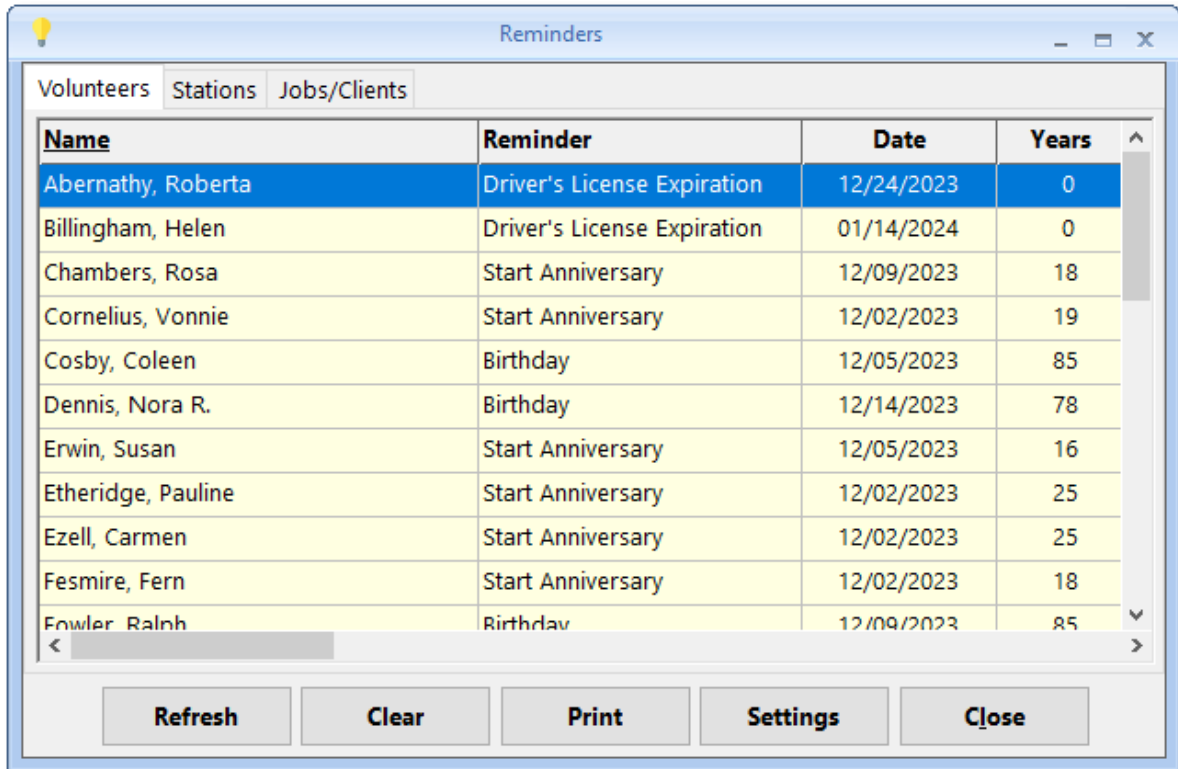
To once again see all the records, reselect the filter called "All Records" which is always at the top of the list of available filters.

If you select a filter and suddenly no records are shown, you may have created a filter with two limitations that cancel each other out. Edit the filter and try a different limitation.

## 12.4 Reminders

The Reporter will remind or alert you to upcoming dates for volunteers, stations, and jobs. It's simple to set up and then works automatically to remind you of upcoming deadlines or renewals.



You start Reminders from either the top menu under Reporting or from the lightbulb icon on the toolbar.



**Settings**

At first, there won't be any reminders until you set them up. Click on the Settings button and set a reminder for any date field. For example, set a reminder for a volunteer's driver's license expiration to be 60 days in advance. From then on the Reporter will remind you 2 months before every volunteer's driver license expires. In the same way you can set up reminders for any date in Stations and Jobs. You can also choose to have the reminder screen open automatically every time you start the Reporter.

### Sorting and Printing

When viewing reminders, click on the column heading for Name, Reminders, or Date to sort the reminders that way. Click on the Print button to get a list of today's reminders.



### Clearing Reminders

You can clear a reminder manually by clicking on the Clear button. When you clear it, it won't pop up tomorrow, not until it comes around again next year. You don't have to clear it because it will automatically go away once it becomes outdated. For example, if you set a 7 day reminder on birthdays, the Reporter will remind you every day for a week unless you clear it. After the week, you won't be reminded again whether you have cleared it or not.

### Customizing Reminders

If you only want some users to see reminders you can set their access level under File | Users to be either read-only or none.

Just as for every other sections of the Reporter you can change the Reminder icon as well as the name itself. Click on File | Preferences to change the Reminder icon or name as well as every other icon and section name.
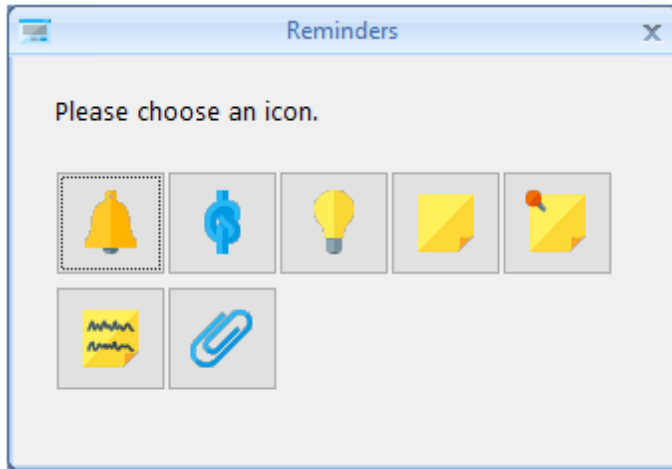
# 13 Touch-Screen Assistant

## 13.1 Program Description

The Touch-Screen Assistant is an add-on program for the Volunteer Reporter. It enables your volunteers to sign themselves in and out using a touch-screen monitor. It is essentially the same as a time clock. Once a volunteer has signed out, their hours are automatically posted to the Volunteer Reporter without any further data entry. This can save your staff a lot of time entering hours into the Reporter at the end of every month.

If your volunteers have name or ID badges with some kind of bar code electronic identifier, the Touch-Screen Assistant can also accept sign-ins via a swipe of their ID badge through a scanner.

The Touch-Screen Assistant consists of two parts -- the Assistant and the Administrator. The Assistant (available as a separate purchase) is what your volunteers see on the touch-screen monitor. It enables your volunteers to enter their PIN and sign themselves in and out. The Administrator is built into the Reporter and enables you to watch and manage the activities of your volunteers as they sign themselves in and out.
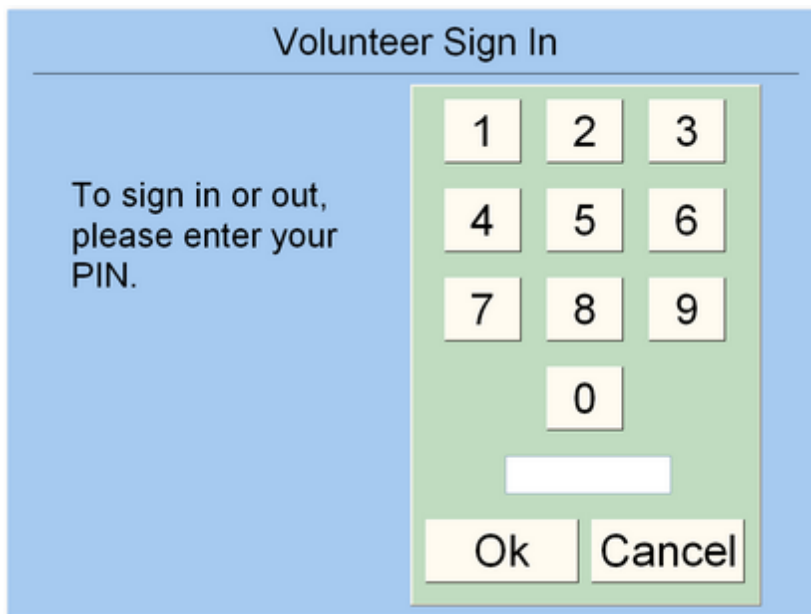


**You volunteers sign in on a touch-screen monitor similar to an ATM.**

The Administrator enables you to watch and manage the activity on the touch-screen monitor. While sitting in your office, you see who is signing in and out. You also make settings in the Administrator that determine how the touch-screen monitor looks and functions. Since the Assistant and Volunteer Reporter's Administrator interact with each other, they must be installed on the same computer network so that the data can be shared between them.

## 13.2 Touch-Screen Installation

### 13.2.1 Installing the Touch-Screen Assistant

**Welcome**

These step-by-step instructions will lead you through the installation process and also get you started using the Touch-Screen Assistant very quickly and easily.

We're here to help. Call us at **800-391-9446**.

Before Installing

Installation

Starting for the First Time

Special Situations / Installation FAQ

## 13.2.2  Before Installing the Touch-Screen Assistant

**Network Requirements**
The Touch-Screen Assistant must be installed on the same computer network as the Volunteer Reporter. The two programs, Assistant and Reporter, interact with each other continuously and access the same data at the same time. There is no possible way to run these programs without installing them on a computer network.

**Touch-Screen Monitor**
The Touch-Screen Assistant works with any touch-screen monitor. We don't have a recommendation of a particular brand or model. You can also choose any size of touch-screen monitor. Since the Touch-Screen Assistant uses large buttons, it will work on even a small touch-screen monitor.

**Computer**
The computer with the touch-screen monitor needs to be used for just this one purpose. It will normally be set up in a public part of the office so that volunteers can easily sign themselves in and out. Since it will only be used for this one application, it can be an older, slower computer.

**Windows**
The Touch-Screen Assistant will run on Windows 7 or better.

**Volunteer Reporter**
The Volunteer Reporter, version 6.8 or greater, must be installed on the same network as the Touch-Screen Assistant. The Touch-Screen Assistant shares the same data with the Volunteer Reporter. Before installing, confirm the location of the folder that contains the Volunteer Reporter data because you'll need that information when you first start the Assistant.

**Scanner**
If you want to enable you volunteers to sign in by scanning a ID badge with a bar code or electronic information, you need to install the appropriate scanner onto the touch-screen computer.

### 13.2.3  Installation of the Touch-Screen Assistant

**Actual Installation Steps**

1. Run the TSA Setup program.

2. In most cases, you can use all the standard, default settings.

3. By leaving checked the choice to **Automatically load when the computer starts**, an icon for the Assistant will be installed into your computer's Startup folder so that the Assistant will load every time the computer is restarted. Since this computer will not be used for anything else, this probably makes sense.
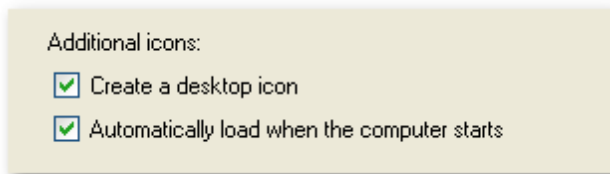


**Computer Settings Checklist**

1. Turn the taskbar to Auto-Hide. To do this, right click on an empty spot of the taskbar and select **Properties**. Check the **Auto-Hide** choice.
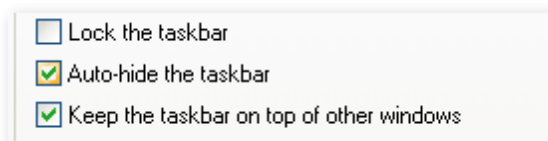


2. Since this computer will always be waiting for volunteers to sign in or out, we must ensure that the screen is always on and doesn't go blank after a period of non-use. To do this, right click on an empty spot of the desktop and select **Properties** or **Personalize**. On the **Screen Saver** tab or button, change the **Screen Saver** to **None**.
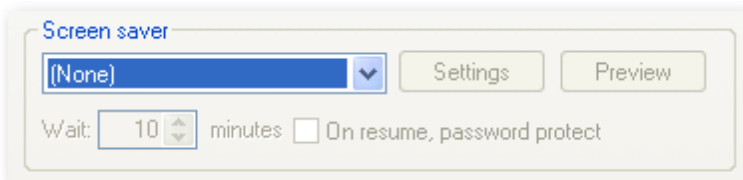


3. As an alternative to no screen saver, change the **Screen Saver** to **Marquee** or **3D Text**. Then click on **Settings** and change the text to "Touch the screen to sign in or out."

4. On the same tab, change any **Energy Saving Features** or **Power Settings** so that the screen doesn't go blank after a certain number of minutes and the computer doesn't go into a standby or sleep mode.
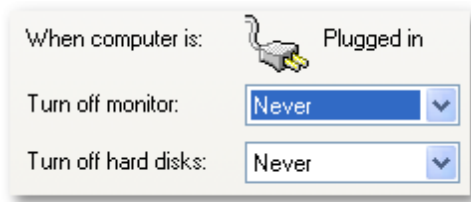
### 13.2.4 Starting the Touch-Screen Assistant for the First Time

**Starting the Assistant**

1. First, start the Volunteer Reporter on the same network at least once. It won't hurt if you try to start the Assistant first, but it won't let you start.

2. In the Volunteer Reporter, click on **Assistants | Touch-Screen Assistant | Settings**. Take note of the **Quit PIN** which defaults to 99999. You'll need to know this number in order to quit and exit from the Assistant on the touch-screen computer.

3. The first time you start the Assistant, it will ask where the Volunteer Reporter's data is located. Use the file folder button to point to the networked folder where the data is located.
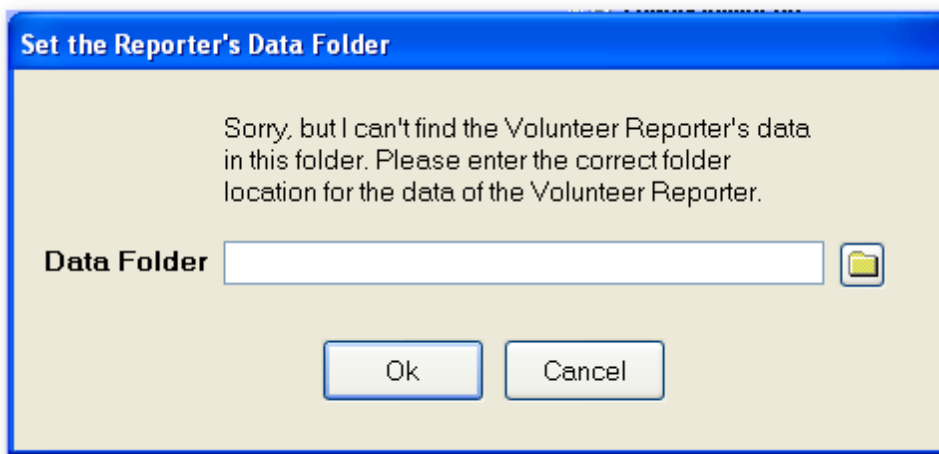


4. To exit from the Assistant, enter the **Quit PIN**. If you don't know it, try 99999.

### 13.2.5  Installation FAQ of the Touch-Screen Assistant

**We have three touch-screen stations. Can we share the Touch-Screen Assistant?**

No, you need to buy a separate copy of the Touch-Screen Assistant for each station. Each station can share the same data set, but you need to purchase another copy for each.

**How do I exit from the Touch-Screen Assistant?**

Enter the **Quit PIN** which defaults to 99999. You set this special PIN in the Volunteer Reporter on the Touch-Screen Assistant Settings screen.

## 13.3   Getting Started with the Assistant

**Setup**

In the Volunteer Reporter, click on **Assistants | Touch-Screen Assistant | Settings**. The settings here control how the Touch-Screen Assistant looks and acts. Adjust the colors if you choose.

Take note of the **Quit PIN.** You'll need to know this number in order to quit and exit from the Assistant on the touch-screen computer.

**Assign PINs**

In the Volunteer Reporter, click on **Assistants | Touch-Screen Assistant** and go to the **Assign PINs** tab. Click on the **Auto Assign** button in order to give each volunteer a starting PIN. We recommend you start your PINs with at least a four digit number like 1000. On the same tab, click on the **Print** button to print a list of all PINs. You'll need this list handy to give each volunteer their starting PIN.

**Monitor Activity**

As volunteers start to sign in, watch their activity on the **Who's Here** tab. Once they sign out, their hours will be on the **Approve Hours** tab waiting for your approval. Click the **Refresh** button on both of these tabs to get up-to-the-minute information.

**Set up the Touch-Screen Computer**

Install the Assistant as the only application on a touch-screen monitor and put the computer and monitor in a public place where the volunteers come to sign in. Hide the keyboard and mouse so that your volunteers don't try to use them instead of touching the screen.

**Starting the Touch-Screen**

Since the Assistant will be the only application running on the touch-screen computer, we can start it automatically when the computer starts and leave it running all day. To have it start automatically, drag its icon in the Startup folder although this was probably done automatically during installation. Any icon in the Startup folder starts when the computer starts.

**Sign In on the Touch-Screen**

The Assistant is very easy to use with almost no direction. Your volunteers will enter their PINs and then sign themselves in or out. If a volunteer doesn't know his/her PIN, they can use their social security number instead and they can change their PIN to one they are already familiar with. Volunteers follow the prompts and directions on the screen in order to sign in or out.

Since a volunteer can only be serving at one job at a time, the Assistant will only let them sign out of one job before they can sign in at another. If a volunteer forgets to sign out, you'll see a record of the volunteer in the Administrator on the Who's Here? screen.

**Quitting and Exiting**

To exit from the Assistant, enter the **Quit PIN** that you set in the Administrator. This is the only way to exit from the Assistant. Don't shut down the computer without first exiting from the Assistant.

Normally you will keep the Assistant running all day while your volunteers are serving in various

capacities, but if you need to shut it down while volunteers are still signed in, it won't hurt anything. When you restart it all of the volunteer's data will still be the same and they can sign out normally.

**Messages**
Your volunteers might occasionally get one of these messages.

Sorry, but you did not sign in or out. Please try again.

Ok

This is a general purpose message saying that whatever they were trying to do, didn't work. For example, if they press the Cancel button, they will get this message.

Sorry, but you are currently marked as being inactive.

You'll have to get the staff to activate you first.

Ok
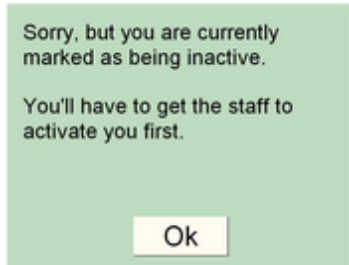
This volunteer currently has a termination date in the Volunteer Reporter. Use the Reporter to restart the volunteer.

Sorry, but there are no job placements on file for you.

You'll have to get the staff to assign you to a job first.

Ok
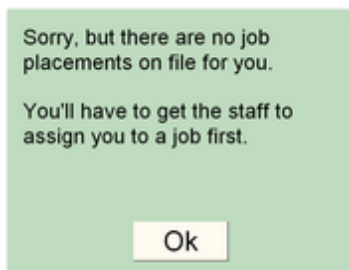
In the Volunteer Reporter, this volunteer has no valid placements. Use the Reporter to add a placement.

**Timed Out**
If a volunteers waits too long (over 30 seconds) without pressing any button, the Assistant cancels whatever they are doing and starts over. This is so that even if a volunteer walks away before finishing entering their PIN, the Assistant will reset automatically after 30 seconds.

## 13.4 Touch-Screen Assistant Reference

**Who's Here**

This screen shows who is currently signed in. It shows the date and time each volunteer signed in to serve at a job. Once the volunteer signs out, their record is automatically removed from this screen and their hours are either automatically transferred to the Volunteer Reporter or moved to the "Approve Hours" screen based upon the settings you have chosen on the "Settings" screen. The data on this screen is normally sorted in order by the date and time, but you can change the sorting by clicking on a column heading. For example, to sort by the name of the volunteer, click on the column heading "Volunteer".
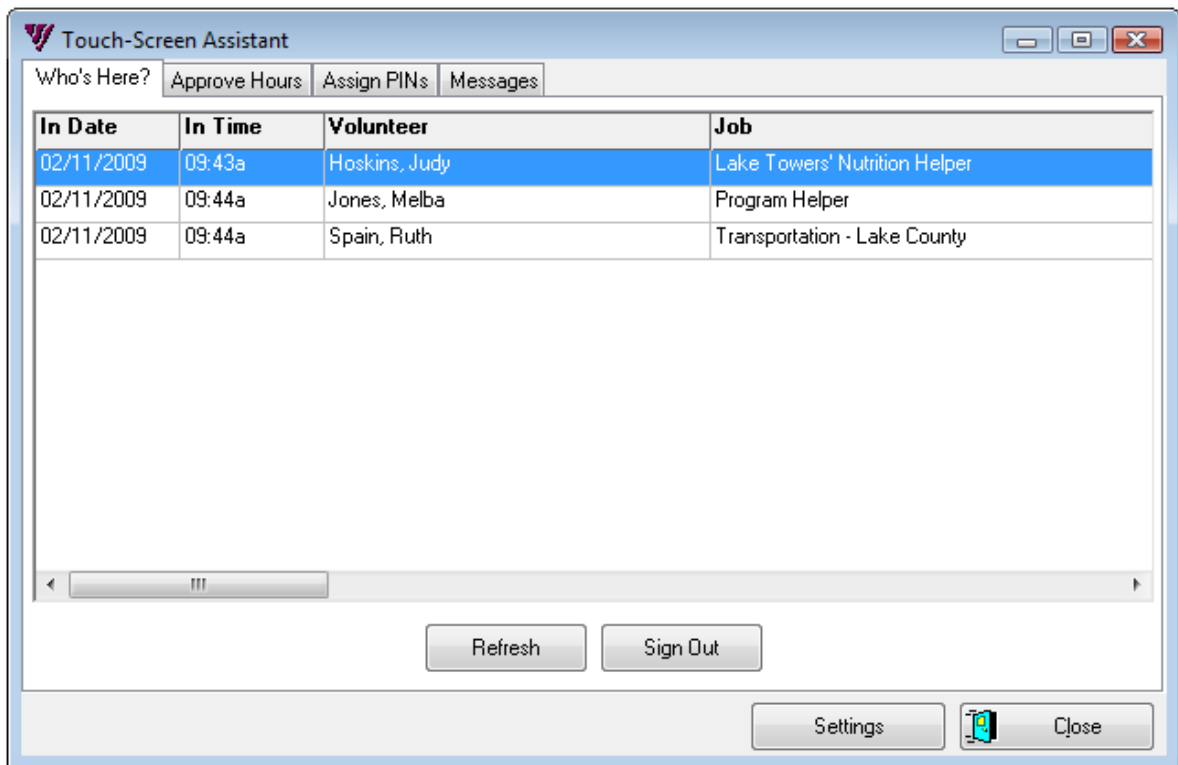


If you need to sign out someone who has forgotten to do so, you can do it right here. Click on the Sign Out button to manually sign out a volunteer. Enter either the time the volunteer should have signed out or the total number of hours the volunteer served. You can also delete the record of when the volunteer signed in without posting any hours.

### Approve Hours

After a volunteer signs out, this screen will show the date and number of hours the volunteer served at a single job. When the hours are listed on this screen they are waiting for your approval before being posted to the Volunteer Reporter. Once you approve an hours record on this screen, the hours are automatically posted there without any further intervention.
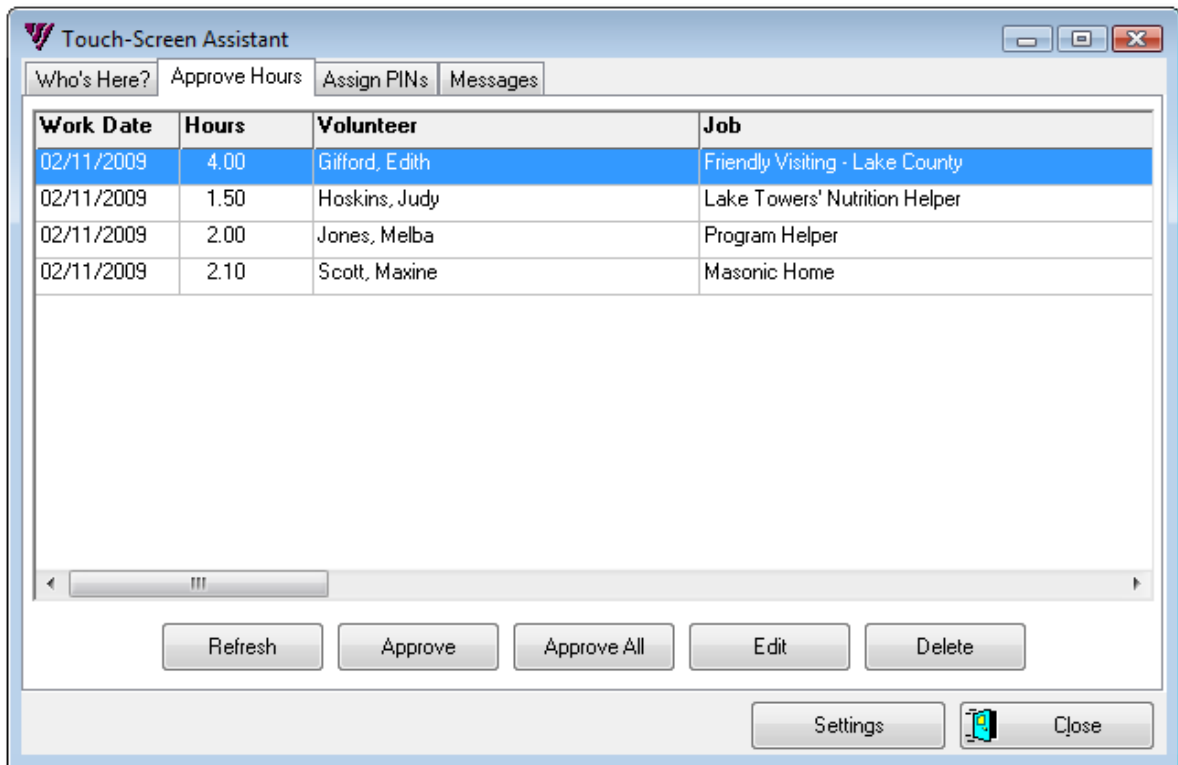
Based upon a setting on the Settings tab, this screen might show a few records or many. On the Settings tab, you can choose to approve all hours by setting the approval limit to zero or approve only those hours records over a certain limit. For example, you can choose to approve only hours records over 4 hours which means that any volunteer who signs in and out within a four hour period of time will have their hours automatically posted to the Volunteer Reporter and those hours will never appear on this screen. Only hours above the limit set on the Settings tab will be shown on this screen waiting for your approval.

You can approve the hours one record at a time or all of them at once. If you approve a single record by clicking on the Approve button, that hours record will immediately be posted to the Volunteer Reporter without any further confirmation. This makes it very fast for you to approve a number of hours records in succession. If you click on the Approve All button, the Administrator will confirm with you one more time before posting them all at once.

You can also edit a single hours record and change the date or number of hours before approval. Finally, you can delete a single hours record in which case the hours will not be posted to the Volunteer Reporter.

The data on this screen is normally sorted in order by volunteer's name, but you can change the sorting by clicking on a column heading. For example, to sort by the job's name, click on the column heading "Job".

### Assign PINs

Each volunteer needs a PIN (personal identification number) in order to sign in or out. On this screen you can assign new PINs and change existing PINs. When you first start using this program all the PINs will be empty. You can either leave them empty and let your volunteer's pick their own PINs or automatically

assign a PIN to everyone. Either way will work fine.

If you have volunteers who both use the Touch-Screen Assistant to sign in and out as well as use the Web Assistant to enter hours from home, it can be good for them to be able to use the same password for both. The Touch-Screen Assistant enables you to duplicate each volunteer's Web Assistant password, but only if their Web Assistant password consists of just numbers and is not already used as someone else's PIN.
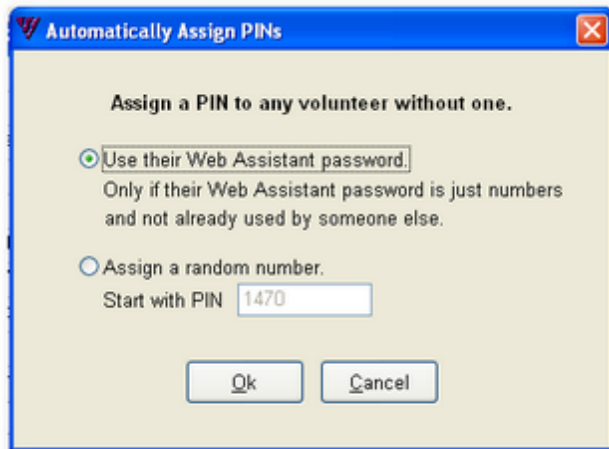
To automatically assign a PIN to everyone, click on the Auto Assign button and pick a starting PIN number. You should probably start with at least a 4 digit number like 1000. The only problem with assigning a  PIN to everyone is that then all of those PINs are taken and can't be chosen by anyone else. For example, no one can choose PIN number 1000 as their own because it will already be assigned to someone else.

If you let each volunteer pick their own PIN, you'll either have to let them originally sign in with their social security number and then change their PIN or you'll have to add each PIN one at time on this screen. To add or change a single PIN click on the Edit button. If you want to remove a PIN completely so that a volunteer cannot sign in, click on the Edit button and then backspace over the exiting PIN.

The Print button will print a list of all volunteers and their PINs in order by either their name or PIN.

**Messages**
The Touch-Screen Assistant has a complete messaging system built-in that enables you to communicate with your volunteers as they sign in and out. You can send messages to individuals, groups of people, everyone, and renewal notices. You can even send mini surveys where your volunteers can choose a response.

You can send four different types of messages, plus a universal birthday message. The four types are Individual, Group, Everyone, and Date Based.
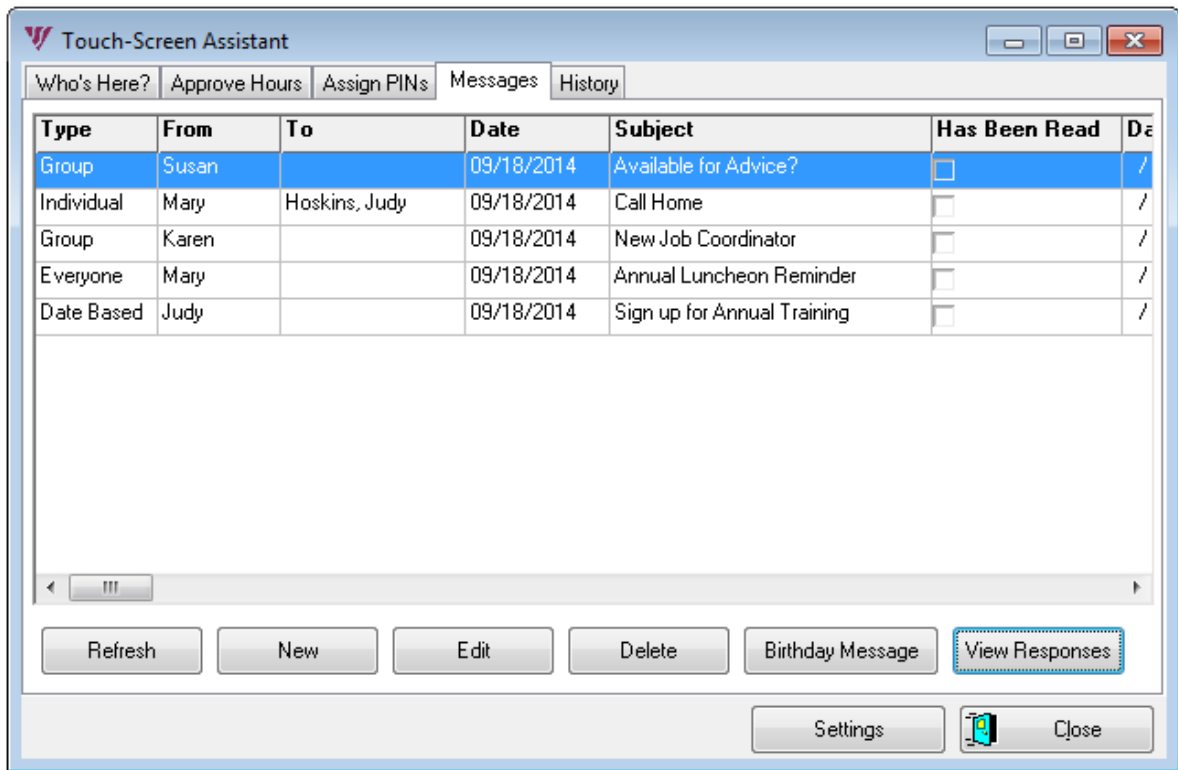
**Individual**  This is sent to a single person whom you pick off a list.

**Group**  This is similar to an individual message, except it is sent to a filtered group of people. After you select the filter, click on Count & Prepare to determine how many volunteers will be sent this message. The same message will be sent to everyone in the filtered group.

**Everyone**  This kind of message is sent to everyone who signs in or out during a period of time. It can be useful to remind everyone of an upcoming event or deadline. For example, send a message to everyone who signs in over the next two weeks reminding them of an upcoming luncheon.

**Date Based**  This message is sent to anyone who has some kind of upcoming renewal date. For example, if you use one of the volunteer user-defined date fields called "Training Due" to keep track of when every volunteer needs to next renew their annual training, you can create a reminder message that is sent to each volunteer a month before their training is due. You can set up this kind of message once and leave it in place for years in order to remind volunteers of something coming due.

**Birthday Message**  To set the default birthday message, click on the **Birthday Message** button. Follow the directions on the screen to set up birthday messages to be sent to every volunteer near their birthday.

To add a new message, click on the **New** button. Choose which type of message and enter the appropriate information. The options are different for each type of message. For some messages you can choose to automatically delete the message after the volunteer reads it while others you can choose to send it just once to a volunteer or every time they sign in or out.

For each message enter who the message is from, the subject, and the actual body of the message. It's just like sending an email to someone except they will receive it when they sign in on the Touch-Screen Assistant.

**Surveys, Messages with a Response**
When sending messages to either an individual or a filtered group, you have the option to require a response from each volunteer. To require a response, click on the **Set Responses** button while creating a new message. You create a response set for the message so that the volunteers can only make one of a few valid choices. You can reuse an existing response set, like a common yes/no response, or create a new response set for a unique message. In this example, we created a response set to ask what they want to eat at the annual luncheon.

As your volunteers respond to your message, you can view (and print) their responses by clicking on the **View Responses** button.
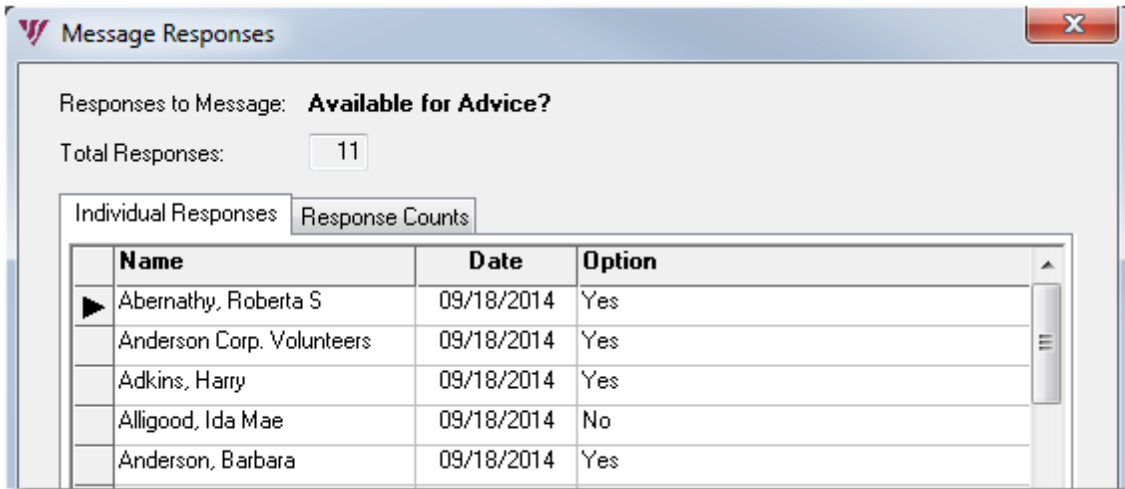


**History**

The Reporter keeps an ongoing historical list of every time a volunteer signs in and out. You can use this to double check on when someone signed in and out.



**Settings**

These settings affect how the Assistant looks on the touch-screen monitor.

The Quit PIN is the PIN number used to quit and exit from the Assistant. You can change it to any number you want. Remember this number because it is the only way to exit from the Assistant.

You can choose to show just job names, or a combination of job and station names. If you are not using station names in the Volunteer Reporter, you'll want to only show job names here.

If your volunteers have an ID badge with either a bar code, magnetic strip, or some other kind of electronic signature, you can have the Touch-Screen Assistant accept input from an attached scanner. Click on Scanner Settings to set up the scanner.

Automatic Signout can be useful if your volunteers sometimes forget to sign out at the end of their service shift. You can specify what time of day the Touch-Screen Assistant should automatically sign them out and how many hours should be assigned to them.

A check mark enables volunteers to use their social security number to sign in if they don't know their PIN. This can be useful when you first start using the Touch-Screen Assistant so that volunteers can get signed in once and immediately set their own PIN for future use. Of course, this will only be useful if you keep track of volunteer's social security numbers in the Volunteer Reporter.

Another check mark enables volunteers to change their own PIN. Again, this can be useful when first

starting so that volunteers can pick their own PIN. Removing this check will protect your system from any mischief makers randomly changing the PINs of others.

You can choose to show each volunteer's lifetime hours to them each time they sign in and out. If you choose to do so, their lifetime hours are displayed along with the sign in and sign out messages.

The Hours Approval Limit enables you to set how the Assistant handles hours. If this is set to zero, all hours will be sent to the Approve Hours screen for your approval before posting to the Volunteer Reporter. If this is set to 4.00 for example, then all hours less than four hours will go straight to the Volunteer Reporter without waiting for approval, but any hours over four will wait for your approval on the Approve Hours screen. You can choose any number for this limit.

The Time Out Interval sets the number of seconds that the Touch-Screen Assistant waits before cancelling the screen. We need some limit here for those times when a volunteer forgets to finish and just walks away from the touch-screen monitor. Normally, this is set to 30 seconds, but you can raise it if your volunteers are having trouble finishing, usually when choosing which job they are going to serve at from a long list of jobs.

**Scanner Settings**
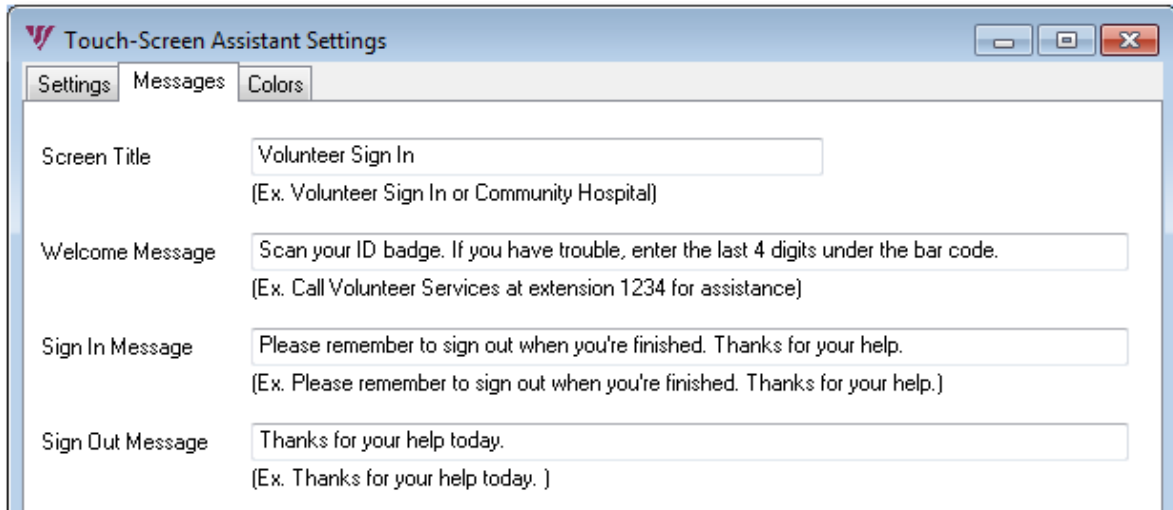


If your volunteers have some kind of ID or Name badge that can be electronically scanned, you can enable the Touch-Screen Assistant to use the scan instead of manually entering a PIN. Every bar code or electronic medium can encode different information, but the Reporter enables you to pick and choose a PIN out of the scanned information. Use the test scanner settings to specify where in a scanned value

to look for a PIN. In the above example, we remove a dash, ignore the opening 4 zeros, and discard the trailing 3 zeros to arrive at a six digit PIN. Try scanning a few different samples on this screen and you can quickly determine the settings to use.

On the Messages Tab, you specify messages that your volunteers will see as they sign in and out on the touch-screen monitor.



The Screen Title is shown at the top of the touch-screen monitor. Typically it would be the name of your organization or something general like "Volunteer Sign In".

The Welcome Message always shows on the touch-screen monitor so it can be used for some additional information such as a person to contact if they need help.

The Sign In Message is shown as the last step when a volunteer signs in. You can insert a general message for everyone like "The annual banquet will be on May 15."

The Sign Out Message is shown as the last step when signing out and you can type any message.

**Colors**
Select a color scheme for the touch-screen monitor. Your selection will only affect the touch-screen monitor, not this computer. You can select colors three different ways, either a pre-defined scheme, custom colors selected from drop down lists, or custom colors you create.

We have created a few pre-defined color schemes from which you can choose. You can create your own custom color scheme by selecting colors for the background, keypad, and buttons from the drop down lists. A little trial and error can produce some fun custom color schemes.
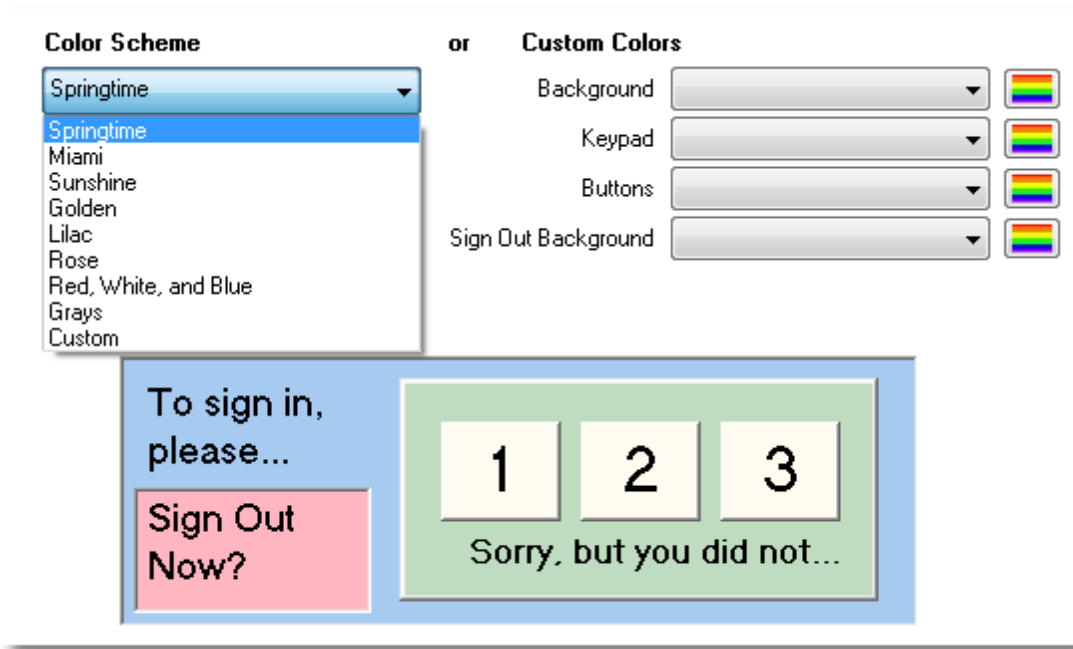
Instead of choosing colors for background, keypad, and buttons from the drop down lists you can click on the rainbow buttons to the right of each selection. Each rainbow button will pop up a custom color window where you can create and use any color. If you use the rainbow buttons to select colors, no color name will show for background, keypad, and buttons because there is no "name" for custom colors.
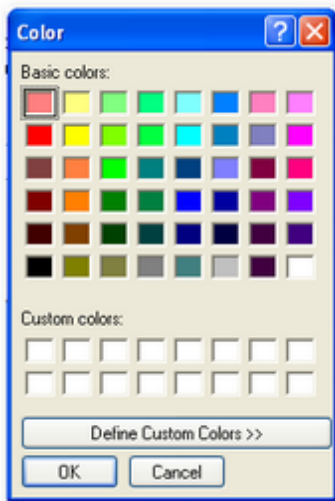


**Refresh Button**

On three of the tabs, Who's Here, Approve Hours, Assign PINs, is a Refresh button. Click on this button to make sure you are seeing the most current information in each case. For example, if a new volunteer signs in, he/she won't show immediately on the "Who's Here?" tab until you click on the Refresh button. Selecting a different tab has the same effect as clicking on Refresh.

**Work Dates**

Since volunteers sign in and out on a particular day, the hours they serve are entered into the Volunteer Reporter on that one specific date. If a volunteer serves more than once in the same month, you'll find separate hours records in the Volunteer Reporter for each date the volunteer signed in/out. This contrasts with how most people manually enter hours into the Volunteer Reporter. Generally, hours are entered on a monthly basis using either the first or last day of the month as the work date for all hours served that month. Having multiple hours records for each volunteer in each month doesn't make a difference and still works well. When you run reports for a period of time, all the hours served during that time are included on the report no matter how many records they consist of.

# 14    Web Assistant

The Web Assistant is a service that enables your volunteers to enter their hours from home, look at new job opportunities, and apply to be a volunteer on-line. Your station supervisors also can enter hours for a group of volunteers at one time. It is very easy for you to incorporate into your existing web site. You drop a few new buttons or links onto your web page and instantly your volunteers can enter their own hours. You manage it all from within the Volunteer Reporter.

You put up to four new buttons on your web page and from then on it looks like your web site. Although your volunteers and supervisors are actually sent to our Internet server, it happens seamlessly so it still looks like they are interfacing with your web page, not ours. They never see any advertising or reference to the Web Assistant or the Volunteer Reporter.

Using the Web Assistant section, you customize how the Web Assistant web page will look and feel to your visitors. Using the Send & Receive Wizard, you exchange information with the Web Assistant as often as you like. You send new volunteers and job postings while receiving hours entered by your volunteers and applications from new interested recruits.

**Getting Started**
Probably the first thing to do is to visit our web site, [www.volsoft.com](http://www.volsoft.com), and take a look at the Web Assistant demo. It will give you an idea of how the Web Assistant works and what it will look like to your volunteers. You will see how your volunteers will interact with the Web Assistant to enter hours and apply online.



**Concepts**
There are two sides to the Web Assistant, the front side and back side. Your volunteers and supervisors see the front side while you control everything from the back side. You access the back side from within the Volunteer Reporter using the Web Assistant screens. When first getting started with the Web Assistant, your main focus will be the Settings screen. On a regular basis, you'll use the Send & Receive wizard to communicate with the Web Assistant server. Data that you receive from the server will be put on the various tabbed screens, New Hours, Applicants, Placements, and Messages.

**Settings**
The settings you choose here affect how your volunteers and applicants see and interact with the Web Assistant. You use these settings to tell the Web Assistant how to look and feel to people who visit it. For example you pick the graphic you want shown on the Web Assistant, you choose whether to ask new applicants for their birth date, and adjust what messages your volunteers receive when they can't remember their password. Without knowing the first thing about designing web pages, you can make selections to quickly and easily change the interface your volunteers see.

**General Tab**

**Id Numbers**  We assign you these numbers. They identify you to the Web Assistant server. Each dataset needs unique ID numbers.

**Password**  You choose your password.

**Organization Name**  The name of your organization that will be displayed on the web pages your volunteers see.

**Bitmap Graphic**  The name of a graphic file that will be automatically inserted at the top of every web page your volunteers see.

**Home Page**  The web address of your home page. This doesn't necessarily have to be your home page, but the page you want people to see whenever they press **Home** while using the Web Assistant.

**Station supervisors can enter hours for their volunteers**  You can choose whether or not to enable station supervisors to enter hours for their volunteers.

**Volunteers can change their password**  Whether you want volunteers to be able to change their own username and password. If not, they have to contact you whenever they want to change their password.

**Volunteers can use the default password**  When your volunteers are first getting started with the Web Assistant, it can be handy to allow them all to sign in once with a default password before choosing their own. Otherwise, you have to tell each volunteer their password.

**Default Password**  The default password they can use.

**File Transfer Timeout**  The number of seconds to wait when communicating with the Web Assistant. You probably don't need to change this.

**Hours Collection Tab**

**How to show jobs**  Whether to show station names or just job names and in which order.

**How to collect hours**  Whether you want your volunteers to enter their hours a month at a time or for single days at a time.

**Hours allowed date range**  How many days in the past and future can your volunteers enter hours? We suggest you leave days in the future to at least 31 so that they can enter hours using the last day of the current month if they are done serving already in this month.

**Which information to collect**  Put a check next to any piece of information you want to collect from your volunteers when they enter hours.

**Manually approve hours limit**  If you trust that your volunteers will accurately enter their hours, you can set a limit here that will save you from having to manually approve them before they are automatically entered into the Reporter data. For example if you set it at two hours, any volunteer who enters two or fewer hours will have their hours automatically entered into the Reporter when you do a **Send & Receive**. Any hours over two will be on the **New Hours** screen.

**Months of past hours to show**  When your volunteers log in to enter new hours, some of their past hours can be shown in order to remind them of what they have already entered. Here you choose how many months of past hours to show to them.

**Job Postings Tab**
Put a check next to each piece of information you want listed about job opportunities posted on the Web Assistant.

**Applications Tab**
Put a check next to each type of information you want to collect from new applicants. The Web Assistant will always collect name, address, and phone.



**Screen Messages Tab**
There are several standard messages shown on the Web Assistant. You can change the standard message to a customized message for your volunteers. For example, if a volunteer doesn't know their password, you can change the message to "If you do not know your username or password, call Mary at 722-4522".

**Usernames & Passwords**
Your volunteers and stations supervisors log into the Web Assistant with a username and password. You control and change them from the Usernames and Supervisors tabs. On these tabs you'll see all of your volunteers and supervisors listed. Originally, all of the usernames and passwords will be blank. You have two ways to assign usernames to volunteers and supervisors. One is to assign them one at a time by clicking on the **Edit** button. This is useful if you only plan to have a few volunteers or supervisors enter hours online. More commonly, you'll use the **Auto Assign** button which will give each volunteer or supervisor a username. The  auto-assigned volunteer username will be based upon their first and last names while the auto-assigned supervisor username will be based upon the name of the station.

**Send & Receive**
You will use the **Send & Receive Wizard** often to communicate with the Web Assistant server. Just like with an email program, no communication happens with the Web Assistant server until you click on this button. For example, no settings you have changed or messages you have composed will be sent until you click on this button.

The Wizard enables you to send volunteers names including their current passwords, placements, and recent hours. You can send all of your volunteers or you can filter the list if you only want some of your

volunteers to be able to enter their hours online.

The Wizard next enables you to send a list of job opportunities to post on the web. Unlike when sending volunteers, you'll probably want to filter the list of jobs often to include just certain jobs that you want to advertise. Whether you filter the list or not, you can choose what order the jobs will be listed in order to show more important or timely jobs at the top of the list.
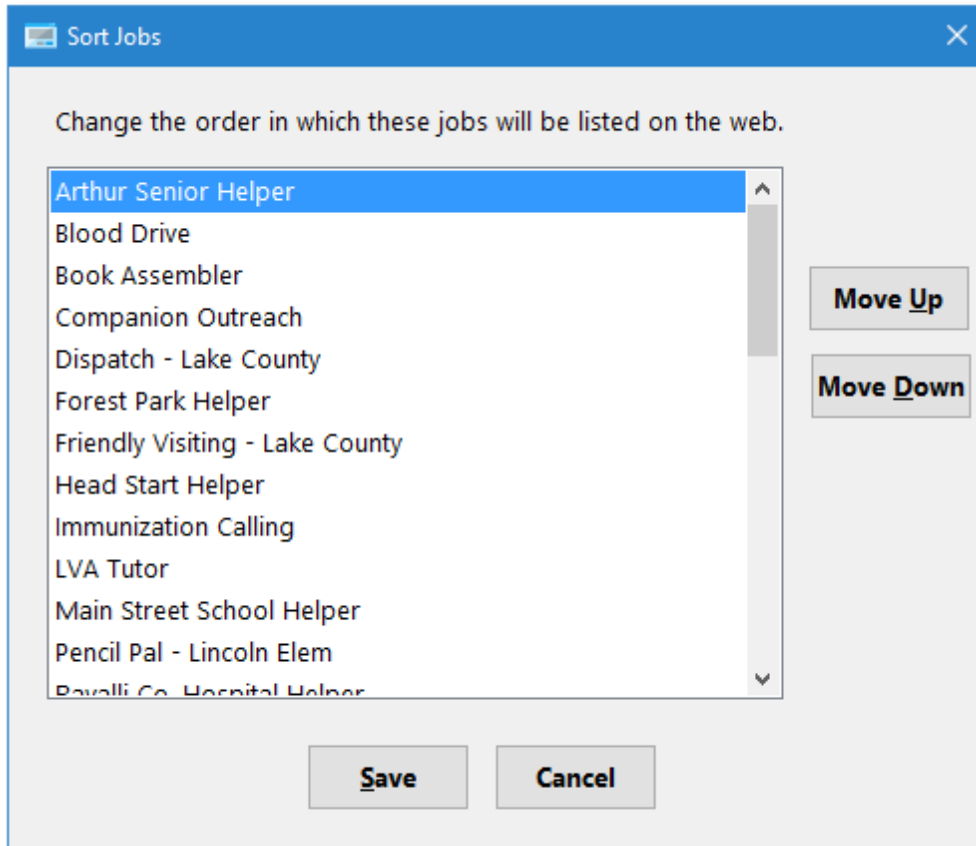


Finally, the Send & Receive Wizard enables you to receive hours and applications as well as send and receive messages. You will normally leave these checked so that you get the newest data entered by your volunteers. After you click on the Finish button, the Reporter will communicate with the Web Assistant server via the Internet and send and receive your data. Any data received will automatically be shown on the various tabs of the Web Assistant screen.

**Approving Data**

Any time you receive data from the Web Assistant server, it will be shown on the various tabs -- New Hours, Applicants, and Placements. When you approve any of this data it is immediately entered into your Reporter data without any further data entry. For hours, only those above the limits you chose on the Settings screen wait for your approval. Hours under the limits are automatically entered into your Reporter data.



When you approve applicants, the information from the online application is entered in volunteer data. If you want to change any of the information, approve it, then go to **Volunteers** and change it there.

Placements are jobs that either existing volunteers or applicants have expressed interest in. You can either approve them or delete them, one at a time. If it is a placement for a new applicant, you must approve the applicant before you can approve the placement.

**Messages**
You can use messages to communicate with your volunteers. When your volunteers enter hours they can also enter a message for you and you can reply to them. They'll see your reply the next time they log in to the Web Assistant. If they entered a message along with hours that they entered, you'll see an "X" in the "Msg" column on the New Hours tab. If you click on **Read Message** while that hours record is highlighted, it will pop you over to the **Inbox** tab so you can read the attached message.

This simple message system is not a replacement for email because your volunteers only get their messages when they log in to the Web Assistant. Also, there is no way to save or catalog messages. You can only read incoming messages, reply to them, and create new messages.

**Security**
Your data is very safe and secure on the Web Assistant server and during transmission over the Internet. First, our data server is in a data center with redundant power and internet connections, biometric security protocols, and it is backed up every night.

Secondly, the Volunteer Reporter is never transmitting sensitive information over the Internet. Your data remains always under your control on your computer or internal network. The only data that is sent over the Internet are volunteer's names, their job placements, and hours they have served. No addresses, phone numbers, social security numbers, or other identifying characteristics.

The one exception to this is when new applicants are applying on line. You have the option to collect social security numbers from them. If you choose to do so, that information will be sent once over the Internet from the Web Assistant to you. If you are worried about the small potential for this information being stolen, don't collect social security numbers on your online applications.

**Firewalls**
A firewall is a protective program in your computer that prevents unauthorized communication in or out from your computer. It is designed to prevent hackers from attacking your computer via the Internet.

A firewall offers great protection, but it can prevent the Reporter from communicating with the Web Assistant. You may find that your firewall pops up a message similar to the one shown here. Usually, it will happen the first time you click on Send & Receive. If it does, it means your firewall is concerned that an unknown program is trying to communicate with the outside world. The unknown program in this case is the Reporter which will be referred to as PlusRun.exe by your firewall.

If this happens, you must tell your firewall to always allow the Reporter to communicate, as shown here.

# 15    Import Assistant

The Import Assistant enables you to import data about either volunteers or hours into the Reporter as if you had entered it directly. Your current data is preserved and this new, imported data is appended into your data set. It can be a handy way to have others collect data for you instead of entering it all yourself.

**Concepts**

The Reporter uses an Excel spreadsheet to import data. The Reporter first creates a blank Excel spreadsheet formatted correctly to receive the data to be imported. You enter the data onto the spreadsheet and then import the spreadsheet back into the Reporter.

Using Excel ensures the data is correctly formatted and can be imported seamlessly. The Reporter creates a blank Excel template and then imports it back knowing the data has been entered in the correct format.

You can share the blank template with others in order to have them enter the data. For example, you could prepare a template for a single job and then email the template to the job supervisor. The supervisor enters the hours for their volunteers and emails it back to you. You import it into the Reporter and approve the hours.

The steps of creating a template, importing it, and approving the hours are all clearly laid out on the tabs of the Import Assistant.

You start the Import Assistant either from the top menu or the toolbar button.



You can select which toolbar button to use in Preferences.
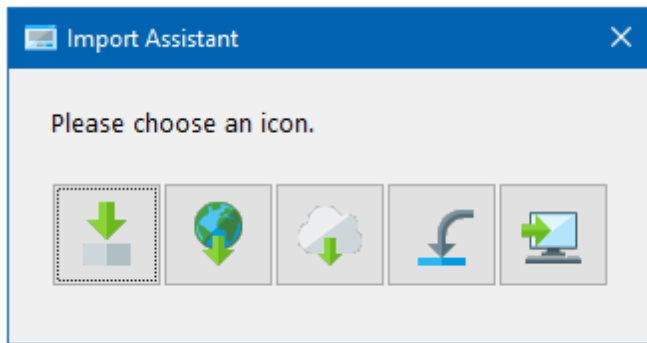


The Import Assistant has four tabs which follow the work flow steps used to import data. Start by creating a template used to enter the data. When the template is filled by you or someone else, import it back which puts the data in a holding area waiting for your approval. You approve the data one at a time or all at once.

Create an Excel template to collect either new volunteer data or new hours. When creating an hours template, you choose the date for the data, commonly for a month at a time. You would normally prepare the hours template for a single job or station, but you could also choose to include all volunteers.



The created template for volunteers has all the columns set up to make it very easy to enter the data in a format that the Reporter will understand. The template includes all possible volunteers fields. All fields except for first and last names are optional.

| | A | B | C | D |
|---|---|---|---|---|
| 1 | Enter new volunteers. When finished, import into the Reporter. | | | |
| 2 | For starred(*) fields use only valid codes on sheet 2 below. | | | |
| 3 | | | | |
| 4 | **Salutation** | **First Name** | **Last Name** | **First Address** |
| 5 | Ms. | Amanda | Clarke | 438 Sunrise Circle |
| 6 | Mrs. | Jane | Thompson | 839 S Fifth St |
| 7 | Mr. | John | Abbot | 483 Hilltop Ave. |

Most of the columns are self explanatory, but some have stars or asterisks. These optional fields have a set number of choices and must be entered exactly.

| Birth Date | Sex (M/F) | Gender * | Ethnicity * |
|---|---|---|---|
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

All available valid codes are listed on a separate tab at the bottom of the Excel spreadsheet template.

| 38 |  |  |
|---|---|---|
| 39 |  |  |

◄  ►  **Volunteers**  Valid Codes  ⊕

Ready  ▦  ⟲ Accessibility: Good to go
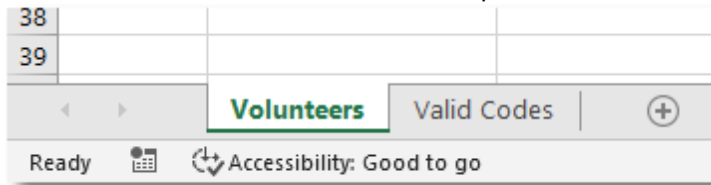
On the tab of Valid Codes is a list of all available codes for each starred field.

|  | A | B | C | D |
|---|---|---|---|---|
| 1 | Use only these exact codes on all starred(*) fields. |  |  |  |
| 2 | You may find it handy to copy/paste them in order to get them exact. |  |  |  |
| 3 |  |  |  |  |
| 4 | **Gender** |  |  |  |
| 5 | Another Gender |  |  |  |
| 6 | Female |  |  |  |
| 7 | Male |  |  |  |
| 8 | Prefer Not To Say |  |  |  |
| 9 | Unknown |  |  |  |
| 10 |  |  |  |  |
| 11 | **Ethnicity** |  |  |  |
| 12 | Hispanic/Latino |  |  |  |
| 13 | Not Hispanic/Latino |  |  |  |

The hours template includes each volunteer's name, job, and collection date that you chose when creating the template. It is laid out just as if you were entering the hours in the Reporter. Just enter the hours for each volunteer who served and then import the spreadsheet back into the Reporter. Feel free to leave any field blank.

| ◢ | A | B | C | D | E | F | G |
|---|---|---|---|---|---|---|---|
| 1 | Enter new hours. When finished, import into the Reporter. | | | | | | |
| 2 | | | | | | | |
| 3 | **Volunteer** | **Jobs/Client** | **Station** | **Date** | **Hours** | **Car Miles** | **Bus $** |
| 4 | Arnold, Wanda | Forest Park Helper | Forest/Parks | 11/30/2024 | | | |
| 5 | Kretzer, Helen | Forest Park Helper | Forest/Parks | 11/30/2024 | | | |
| 6 | Lemmons, Charles R. | Forest Park Helper | Forest/Parks | 11/30/2024 | | | |
| 7 | Lester, Elmer | Forest Park Helper | Forest/Parks | 11/30/2024 | | | |
| 8 | Liebling, Loren | Forest Park Helper | Forest/Parks | 11/30/2024 | | | |
| 9 | Lovelace, Dorothy | Forest Park Helper | Forest/Parks | 11/30/2024 | | | |
| 10 | Parker, Charles T. | Forest Park Helper | Forest/Parks | 11/30/2024 | | | |
| 11 | Purser, Jacqueline B | Forest Park Helper | Forest/Parks | 11/30/2024 | | | |

Once you are finished entering data into the spreadsheet template, import it back into the Reporter.

**Import Assistant**

| Create Template | Import Spreadsheet | Approve Volunteers | Approve Hours |

Import a completed spreadsheet back into the Reporter. You must have created the spreadsheet originally from a template on the previous tab and then entered data into it.

**Volunteers Spreadsheet**

○ Import a Spreadsheet of New Volunteers

Spreadsheet Name  C:\Users\Joan

**Hours Spreadsheet**

Rows with a blank date or zero hours will be skipped.

◉ Import a Spreadsheet of New Hours

Spreadsheet Name  C:\Users\Joan\Documents\New Hours Template.xls

**Import**

**Close**

The imported data is displayed on either the Approve Volunteers or Approve Hours tab, waiting for your approval. The imported data waits in this holding area for your approval. You can't make any changes to the data here in the holding area. You can only approve it or delete it. If you want to change it, you must first approve it and then go to either the volunteer or hours screen and edit it.
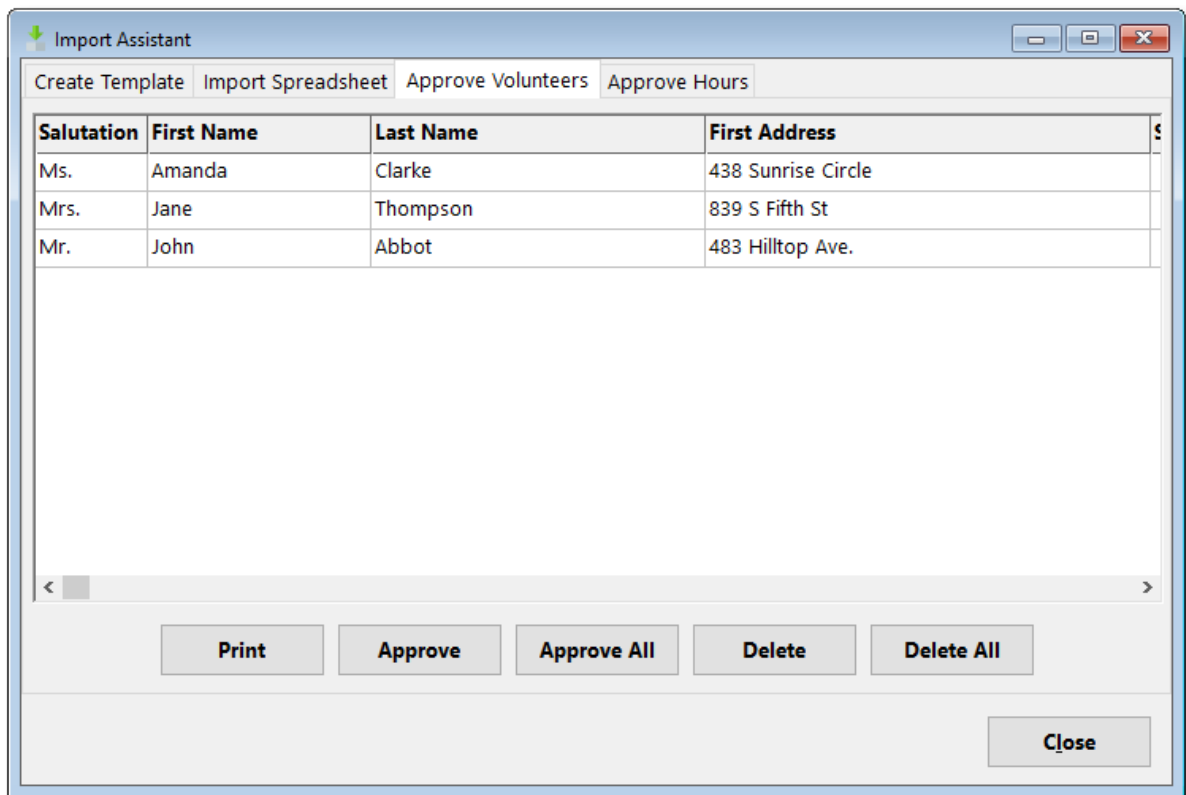
Upon your approval the imported data is added to your existing data as if you had entered it directly into the Reporter. It's simple and quick.

# 16    File Utilities

## 16.1    Backup

Please backup your files often. Daily is best and easy to accomplish.

It's a fact of life, learned the hard way too often, that hard disks and other computer components fail. If you have recently backed up data files when this happens, you'll be home free. If you don't have current backups, you stand to lose all your work stored in the data files since your last backup.

Backups are easy to do with the Volunteer Reporter utility Backup Data Files. You may want to keep several versions of your backups so that, for example, you always have today's data backed up as well as yesterday's data also backed up.
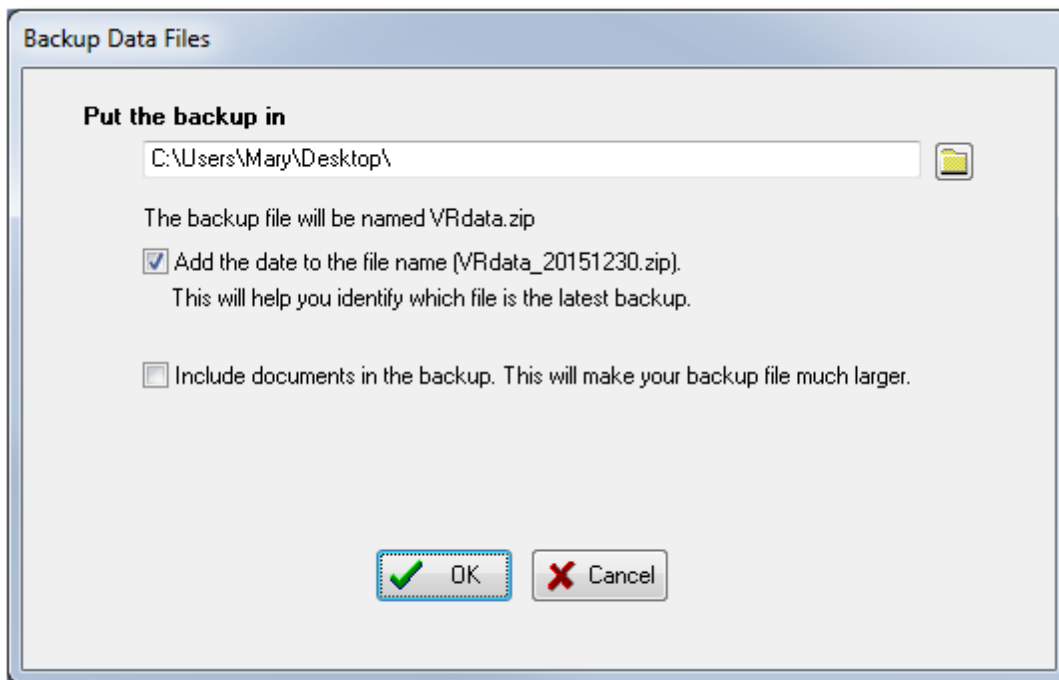


The Backup Data Files routine copies your data files to USB flash drives, external drives, or any networked drive. Simply follow the directions on the screen.

Normally, only your data files are backed up, but not any associated documents that you attached to volunteers, stations, and jobs. If you choose to include documents with your backup by checking that option, your resulting backup file will be much larger. It's a good idea to backup those documents, but the trade off is a much larger backup file.

You might also consider using an external drive or cloud storage to backup everything on your hard disk, not only the Volunteer Reporter data.

The backup file made by the Volunteer Reporter is a standard zip file.

Be careful about putting your only backup on your internal hard drive because if it fails, so does your backup. You should usually make backups onto a USB flash drive or other external drive.

The Reporter backs up only the currently selected data set, so if you are using several data sets, be sure to backup each one individually and keep them clearly labeled. For every data set, the backup file is named VRData.zip.

## 16.2 Restore

Careful, this is a utility that can destroy your data files if not used with care. This utility replaces your working data files with backups that might not have up-to-date data. You'll use this routine only rarely, if for some reason you've lost your current data.

Never use this routine to restore your backup files unless the original files on your hard drive are worthless. If you do have to use this routine, just follow the prompts.

**Restore Data Files**

**Restore from this file**

F:\

Restore files are zip files that start with VRdata. Examples are **VRdata.zip** and **VRdata_20090211.zip**.

✓ OK    ✗ Cancel
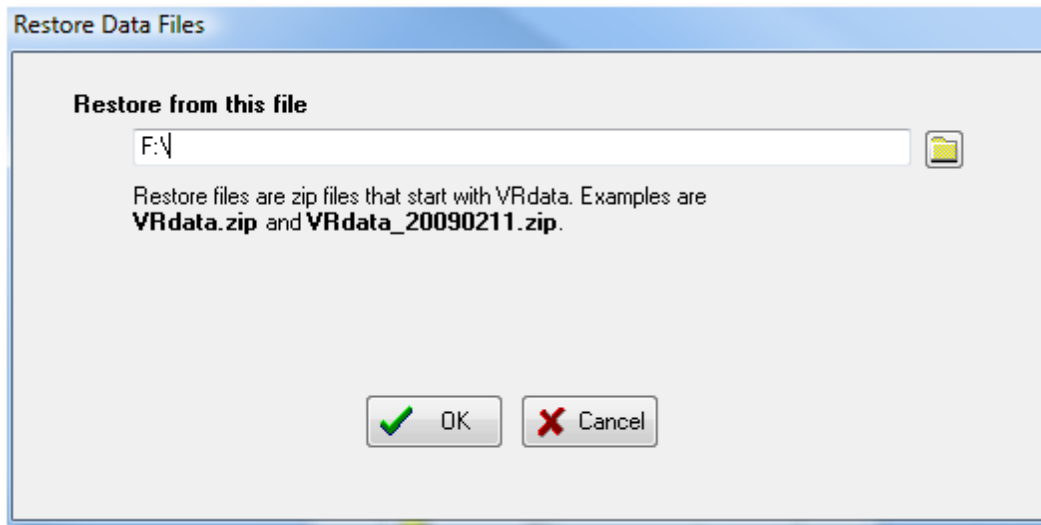
The Reporter restores data to the currently selected data set even if that is the not the data set from which the backup was made. Be sure to keep your backups clearly labeled and select the correct data set before restoring data.

## 16.3 Select Data Set

The Reporter enables you to keep track of multiple, separate sets of volunteers. Each data set has its own volunteers, stations, jobs, and hours with no overlap. You can have an unlimited number of data sets.

For example, you can keep a data set called "RSVP" and a separate data set called "FGP". Or you can track data sets called "Franklin County", "Teenage Volunteers", or "Mandated Volunteers". Each data set is completely separate and you cannot transfer people from one to another. If you have the same person entered into two data sets and you need to change their telephone number, you'll have to change it in both data sets. Therefore, these data sets are not designed to replace the "grouping" feature built into the Reporter, but as an additional method to track unique sets of data.
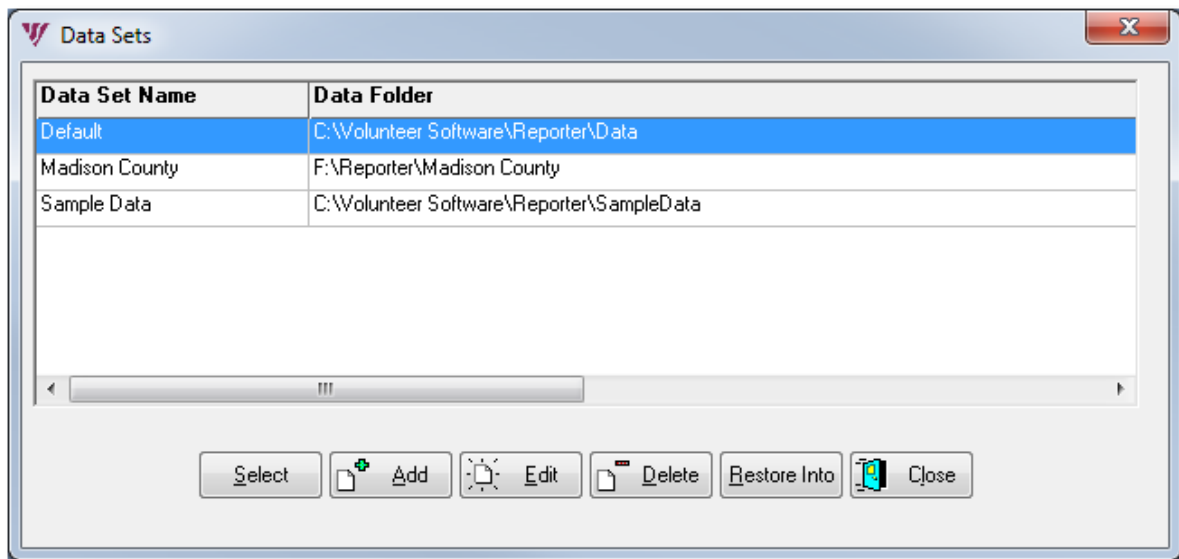
Switching between data sets is very easy. On the File menu is an option called "Select Data Set". From here you can switch between data sets as well as create new data sets. When first installed, you have two data sets named "Default" and "Sample Data". The default data set is empty while the sample data set has about a dozen volunteers to experiment with.

If you want to change the name of your main data set from "Default" to something more meaningful, feel free to do so. When any data set other than "Default" is selected, its name is shown on the top title bar of the Reporter. For example, if you have selected your "Madison County" data set, the title bar will read "Volunteer Reporter – Madison County".

Each data set is installed into a separate folder on either your computer or another computer on the network. To create a new, empty data set, simply give the data set a name and tell it where to create the empty tables. If you assign the new data set a folder location that doesn't exist yet, the Reporter will create it for you. For example, your existing data may be in a folder called C:\Reporter\Data and you could create a new data set named "Teenagers" into a new folder called C:\Reporter\Teenagers.
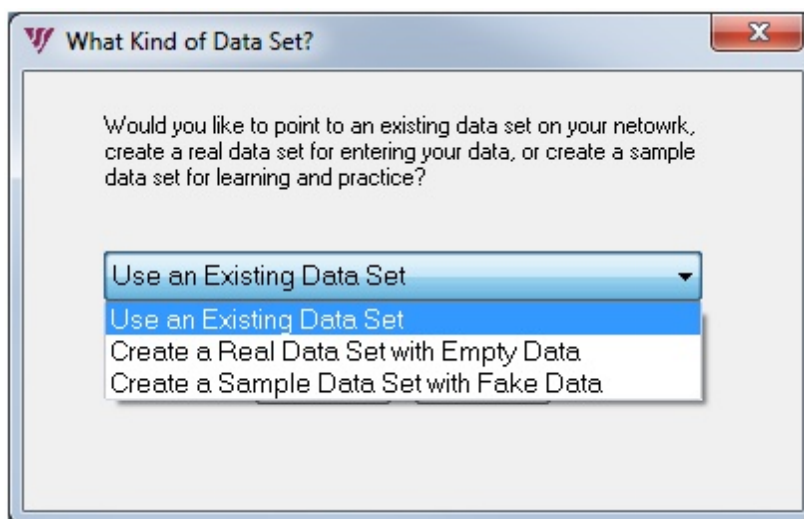
Each data set consists of a number of data tables that have the extension .dbf and .dbt. Those tables also have matching indexes with the .mdx extension. Another category of file used in the Reporter is "shared documents". These are Word templates used to print letters, envelopes, and timesheets. For example, you may have developed a "New Volunteer" letter that you print and send to every volunteer when they first sign up. Since you want anyone on your staff to be able to print that letter, you need to keep it in a location that is shared by everyone instead of keeping it with other, personal Word documents on your private hard drive.

For any new data set, the Reporter creates a "Shared Documents" folder as a subfolder of the data folder. Following the previous example of a new data set named "Teenagers" with the data folder of **C:\Reporter\Teenagers**, the Reporter would normally create the folder **C:\Reporter\Teenagers\Shared Documents** for your shared Word documents.

When you backup your data by clicking on File | Backup, you are backing up just the current data set and when you restore data, you are restoring to the current data set as well. Because of this, you can transfer all data from one data set to another by backing up one, switching to the other data set, and restoring.

There is no way to combine data sets together into one. For example, if you keep data from two separate counties in two data sets and you want to know how many hours were served in both counties combined, you have to run reports from each data set separately and manually add them together.

There is also no way to transfer a single volunteer from one data set to another. If a person is moving from your "Under 55" data set to your "Over 55" data set, you have to terminate the person in one and manually add them into the other.

## 16.4   Reindex Data

This utility remakes the indexes associated with your data files and checks your data for errors. It also recovers disk space being used by deleted records.

Reindex if the indexes should become corrupted. You should suspect that your indexes are corrupted if your reports are out of order, you cannot find a record that you know is there, or if you get error messages during normal operations.
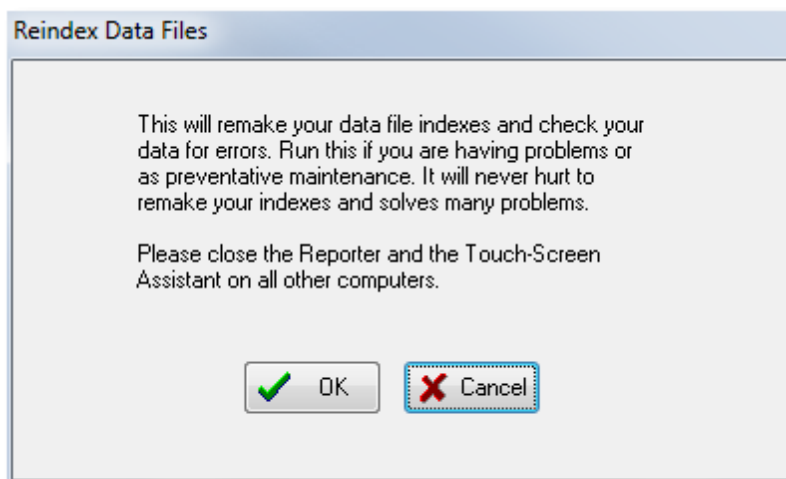


If your data files are very large, making indexes can take a long time, but normally it will only take a few

minutes.

This is a "safe" utility, and the first thing you should try if the Volunteer Reporter is not functioning correctly.

## 16.5   Usernames, Passwords, and Access

You can use usernames and passwords to restrict access to certain parts of the Reporter. Every person using the Reporter can have their own user name, password, and individualized access levels for every section of the Reporter. For example, you can restrict one person to just entering hours while another can only print reports.

When you first click on Users, you are asked whether or not you want to use passwords. If you don't want to use passwords no one will be asked for their username and password when starting the Reporter and everyone will have full access to all data and the entire program.

At first, there are no users listed and you need to click on the Add User button. Each user can have their own user name and password. Only you can change either their username or password. You can add an unlimited number of users. You must add at least one administrator.



Access levels for every section of the Reporter can be customized for each user. You can give a user "read only" access to certain parts of the Reporter and no access at all to others sections. It is fully customizable for every user. Read Only access means that a user can look at the data, but not change it. No access means that they can't even look at the data in that section.

There is no Read Only access to some sections, just full or none.

When starting the Reporter, users are asked for their user name and password which are not case sensitive.
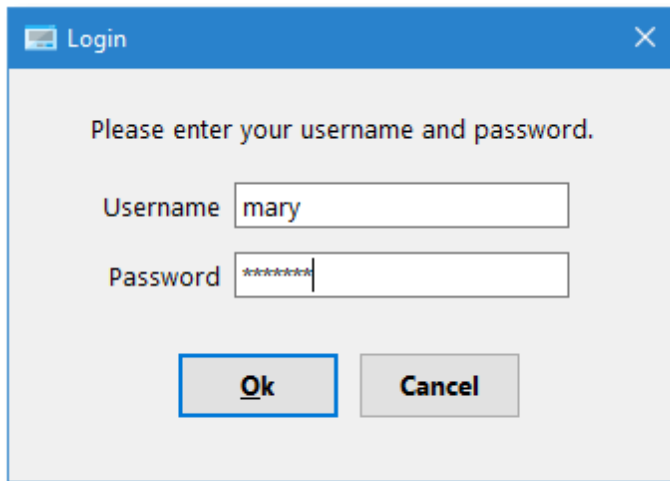
Finally, there are two important facts about passwords you need to know:
       1. If you forget your password, there is no way to start the Volunteer Reporter.
       2. Passwords will not protect you from a computer expert who is determined to break into your data.

## 16.6   Preferences

### Setup Wizard

When first starting with the Reporter, click on the Wizard button to run the Setup Wizard. It will help you customize the preference choices to match how you will be using the Reporter. You will pick the best match from a list of organization types and then answer a few questions. You can run the Setup Wizard any time.

### Sections

On this tab, change the displayed name of any section and select an appropriate icon. For example, if you never work with clients, change the displayed name for Jobs/Clients to be Jobs. Conversely, if you only work with clients, change it Clients. If you want to use the Volunteer Reporter for something completely different, you could change Volunteers to be Customers, Parents, or People, for example.
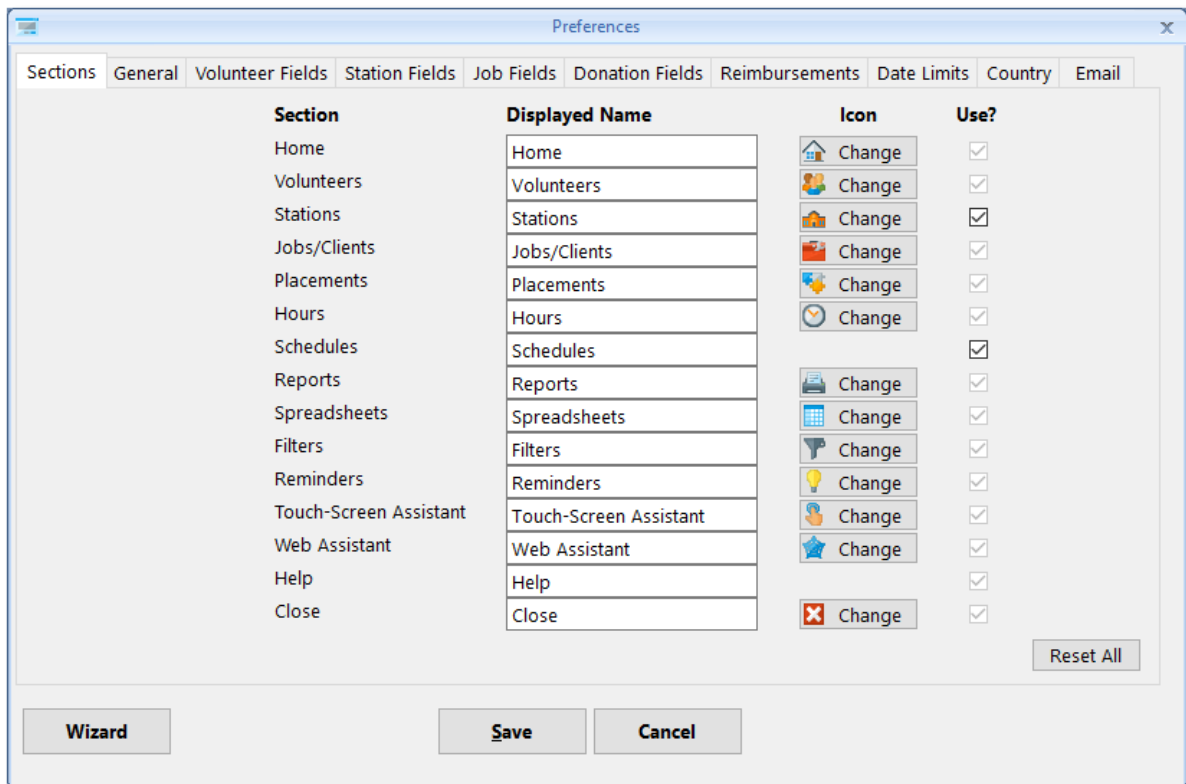
Please realize that changing the name of a section won't change its purpose. For example, if you change the name of Reports to something crazy like Children, it's still going to run reports when you click on it.

If you want to get back to normal, click on Reset All.

## General

**Mileage Reimbursement Amount**
Set the amount you will reimburse volunteers for each mile they drive. When you change it, only new records will be affected, old records stay the same.

**Stipends**
You can specify that you will be paying stipends to some of your volunteers at some jobs. The default stipend amount that you enter here can be overridden for each job. For stipends to be calculated by the Reporter, the volunteer needs to be checked as a stipended volunteer and the job needs to be checked as a stipend job. If you don't pay any stipends, remove this check and you won't see any other references to stipends throughout the Reporter.

**Default Value Wage for Jobs**
Whenever you change this value, all jobs marked as using the default value wage will automatically be updated.

**Start of Fiscal Year**
Set the month at the start of your organization's fiscal year. This will automatically give you an easy option when running reports to limit the report to just that period of time. For example, if your budget year starts in April and you set that here, on Hourly reports you will have the option to select "This April-March" and "Last April-March".

**Hours Display**
Choose to enter hours as 2 hours and 30 minutes or 2.5 hours.

**Duplicate Check**
If you don't want to check for duplicate volunteers already on file when adding new volunteers, remove this check mark.

**Assign Serial Numbers**
Use this to assign the next record number to be used for volunteers, stations, and jobs. The Volunteer Reporter will advance all future numbers from here.

**Automatically check for live updates**
The Reporter can go out to the web and check on a regular basis for any upgrade patches. If there are any, they will automatically load into the Reporter.

**Impact Jobs**
RSVPs, FGPs, and SCPs are usually the only organizations that use this feature to track the kind of impact your volunteers are making on the community.

**Service Categories**
Service Categories are an outdated classification for jobs. We recommend you turn it off.

**Personal Folder**
This is the default location where merge files and report files (printer and HTML files) will be created.

## Field Lists

The Volunteer Reporter comes with many more fields than you could ever want. Each field is a separate piece of information like city, state, and zip. Many fields are pretty standard (address, phone, email), but we supply many more in order to meet everyone's needs. For example, we supply fields for 6 different phone numbers, 20 different codes, and 9 alternate addresses for every volunteer.

On this screen you can turn off fields you don't need, put them in an order that makes sense to you, rename any, and set default values. Throughout this screen, the cells shown in white can be changed, the ones in yellow (or some other color), cannot. For example, since the Reporter requires that every volunteer has a first and last name, you can't turn those fields off.

**Volunteers, Stations, and Jobs**
All of these sections work the same way in regards to working with the field lists. Once you understand how to work with one of them, it's easy to adjust fields for the others.

**Turn Off Fields**
To turn off a field that you don't want to use, remove the check mark in the **Use?** column. Notice that it will still be assigned an order number, but it won't appear on any other screen, report, or spreadsheet. You can turn it back on if you need to later.

**Required Fields**
Put a check in the **Req?** column to require that something be entered into that field when adding a new record. You can only require fields that are white, not the yellowed cells.

**Rename Fields**
You can change the name of any field in the **Displayed Name** column. Mostly this is used to rename generic fields like "Check Mark 1" to "Photo Release". You can also change the name of a field to match your country or language such as changing "Zip" to "Postal Code". If you change your mind, click on the "Use Standard Name" button to return the field to it's normal name.

**Reuse Fields for New Purposes**
You may be tempted to use a field for a completely different, unintended purpose. For example, you may decide to take the unused "Country" field and reuse it for "Spouse's Name". This is a bad idea because the Reporter still thinks this field is being used for the name of a country and will print it on mailing labels which would look pretty funny. Instead, use one of the many generic fields (farther down the list). For example use one of the "Text Fields" for "Spouse's Name".

**Reorder Fields**
By moving fields up or down in this list, you will change the order that they are shown to you on data entry screens as well as on some reports and spreadsheets. Move fields up or down with the various buttons, up or down 1 at a time, 10 at a time, or to the top or bottom. There is no need to put unused fields at the bottom because they won't be shown if they don't have a check mark in the **Use?** column.

The "Donations, "Comments", and "Documents" fields are special cases because they will always be

shown on separate tabs no matter what position you move them to. You can choose not to use them, but if used, they will always display on their own tabs.

### Arrange and Organize Fields
By putting a check in the column **Line Below** you tell the Reporter to insert a horizontal line across the data entry screen below this field. Use this to group the fields in logical sections. For example, put a divider after the Zip field to visually indicate an end to the address fields.

### Set a Default Value
Click the **Enter Default** to enter a value in the **Default Value** column. That value will automatically be entered when you add a record. For example, if you enter Missoula and MT into the city and state default values, when you add a new volunteer, they will be filled in already. You can only enter default values in the white, non-colored cells. Use the **Clear Default** button to erase a default value that you previously entered.

### Set How Many to Show
For some fields (mostly near the bottom of the list), you can tell the Reporter how many to show by entering a number in the **Count** column. For example, if you enter 3 to show for Skills, the Reporter will show the first 3 skills for every volunteer. You can still enter an unlimited number of skills, but it will only show the first 3 without you having to scroll the list. You could instead set the show count for skills to be 20, but then it will take up a lot more space on the screen, even if a volunteer only has a few skills. It's a trade off that you get to adjust.

For the volunteer fields "Multiple Addresses" and "Contacts" the show count number indicates how many addresses to show, up to 9. For example, you could show 3 additional contacts, one each for beneficiary, emergency contact, and physician.

### Specify Code Values and List Items
For code and list fields like Skills, Awards, and Counties, click on the **Edit List** button to change the list of available values. These are the values that are available when adding a new record. Add new values, edit existing ones, delete unused ones, or print a list of them. The **Edit List** button is grayed out and not available except when you are positioned on a code or list field.

## Donation Fields
Change the codes used when adding new donations.

## Reimbursement Limits
This preference lets you adjust the defined limits to reimbursement amounts for your particular project. Many offices have a policy of only reimbursing volunteers up to a predefined amount which this preference enables you to handle automatically.

It works like this: Here, in the Preferences section, you tell the Volunteer Reporter your monthly reimbursements limits. When entering an individual volunteer's hours, don't worry about your reimbursement limits because the Volunteer Reporter will handle it later. Enter all the reimbursement claimed by each volunteer.

Later, when printing reports, the Volunteer Reporter adds up the amount claimed by the volunteer for each expense category (car, bus, van, taxi, meals, parking, other) and checks the total against your defined limits. All monies less than your defined limits are counted as reimbursement, while all monies over your defined limits are counted as an in-kind contribution made by the volunteer.

## Date Limits

This section enables you to set limitations on date entry fields in order to prevent data entry mistakes with dates being too far in the past or the future. You can set limitations on any or all date fields by simply checking the options and filling in the limiting length of time. For example, you can choose to allow hours to be entered up to three months ago or only one month ago.

You can also choose to not check dates at all or to check them only when adding new records, but not when editing existing records. Each date field in the Reporter is included so that you can choose to check or not to check each individual date field.

These limitations do not apply when entering dates for reporting periods so that you can still run reports and spreadsheets for any period of time.

## Country

The Reporter can be set to use any country's address, telephone, date, and currency formats. The date format and currency symbol are set on your Windows Control Panel and those settings are followed by the Reporter.

If you are in either the U.S. or Canada, simple select that country on this tab and all the other settings will be correct for you. If you are in any other country, set each format individually. In the U.S., everyone has a "social security number" and in Canada, an "insurance number". You can use that same field for any identification number used in your country.

## Emailing Options

You can can email from the Reporter in several different places. Most commonly, when you are viewing a volunteer you click on the Email button on the toolbar and the Reporter starts an email addressed to the volunteer. You can also send the same email to a number of volunteers by clicking on Volunteer Email Messages on the Reports screen.

The Reporter needs to know how to send email for you and gives you three options. If you normally use Outlook to send email, choose that option and you're all set. If not, you have two more options. Instead of Outlook, you could be using any one of dozens of emailing programs. The Reporter has no way to know what you're using, but Windows does. With the second option here, the Reporter will simply tell Windows to send the email. This works well, but has some limitations, the main one being that the Reporter cannot attach files to an email this way. Most of the time that doesn't matter.
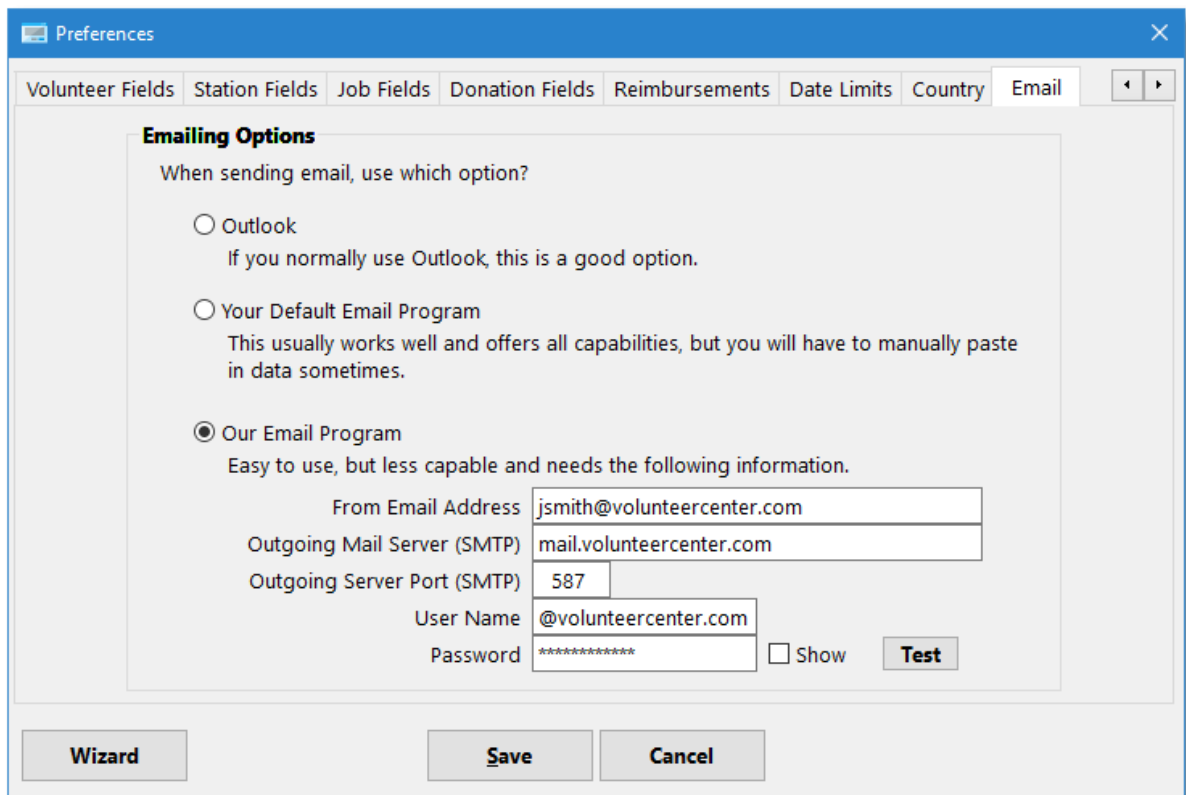
The third option is to use our built-in emailing program which works well, but you have to enter some emailing details. You can usually copy these from your current email program.

## 16.7  Check Service Categories

Service Categories are an outdated measurement that was used by Retired and Senior Volunteer Programs (RSVP), Foster Grandparent Programs (FGP), and Senior Companion Programs (SCP). They have been replaced by Service Activities. Service Activities are kept up to date by the Reporter automatically.

Both Service Categories and Service Activities are grouped into Focus Areas, but even the Focus Areas have changed. This means we are left with older, legacy Focus Areas and current ones.

**Turn off Service Categories** in Preferences unless you have been using them for a long time and want to continue to use them while transitioning to Service Activities.

Service Categories and Focus Areas are predefined by the Corporation for National and Community Service (CNCS). In the past, the CNCS occasionally changed them and this wizard ensured that your codes conformed to the current, official list.

If you are not one of these three types of organizations, you don't have to classify jobs by service category, nor bother with keeping this list up to date. You can turn service categories off in Preferences so that you won't be bothered with them.

---
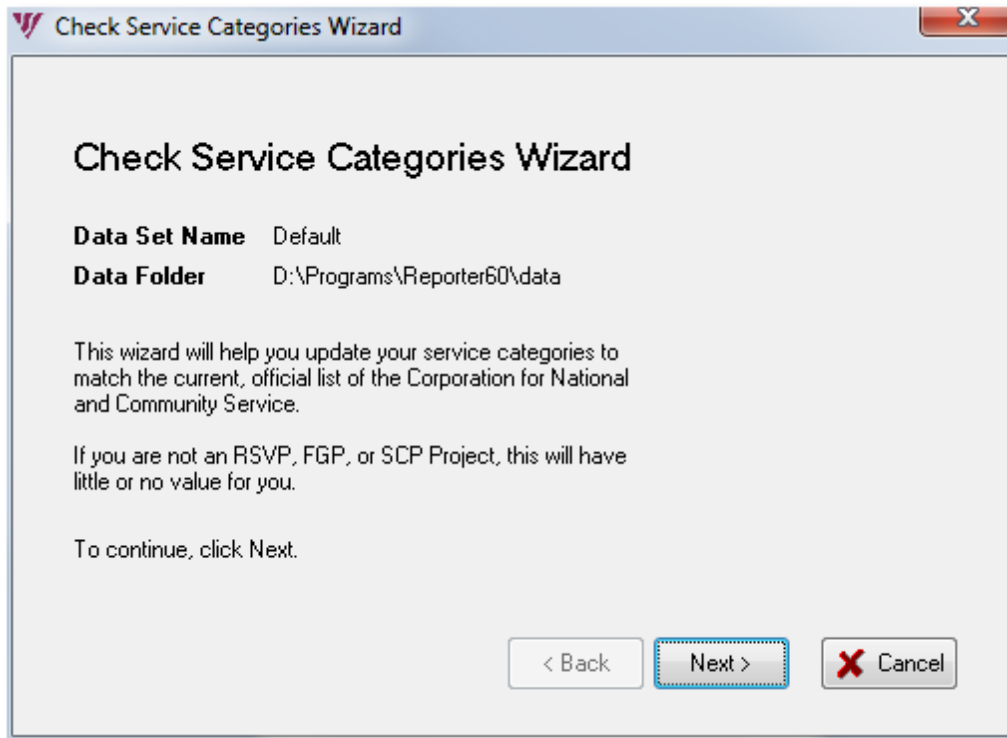
## 16.8 Check Statiion Types

If you are a Retired and Senior Volunteer Program (RSVP), Foster Grandparent Program (FGP), or Senior Companion Program (SCP), you are required to classify stations by their Station Type.

Station Types are predefined by the Corporation for National and Community Service (CNCS). Occasionally, the CNCS changes Station Types and this wizard will confirm that your codes conform to the current, official list.

If you are not one of these three types of organizations, you don't have to classify stations by station type, nor bother with keeping this list up to date. If you don't use Stations (you can turn them off in Preferences), you won't see this option.
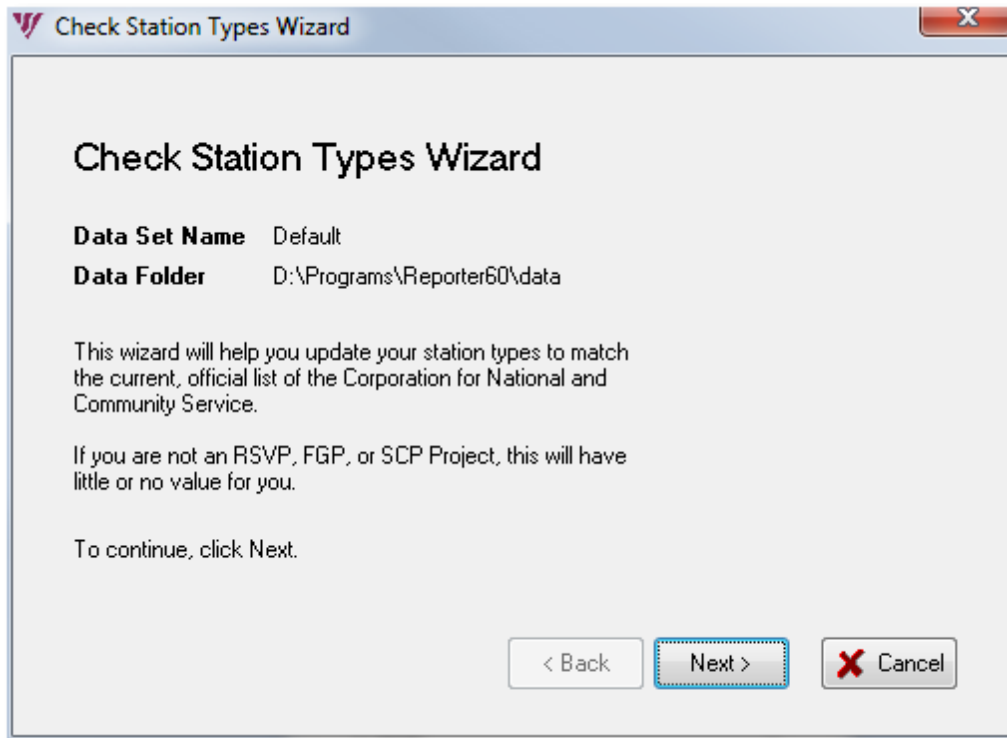
## 16.9 Bulk Replacements

This wizard enables you to enter a field value into many records at once. Here are some examples of how you can use it.

- Enter a county or location for all volunteers at once.
- For everyone with a training renewal date of today, advance that date a year.
- For anyone with a missing zip code, enter one.
- Switch every station from one station type to another.
- Raise the value wage on every job.
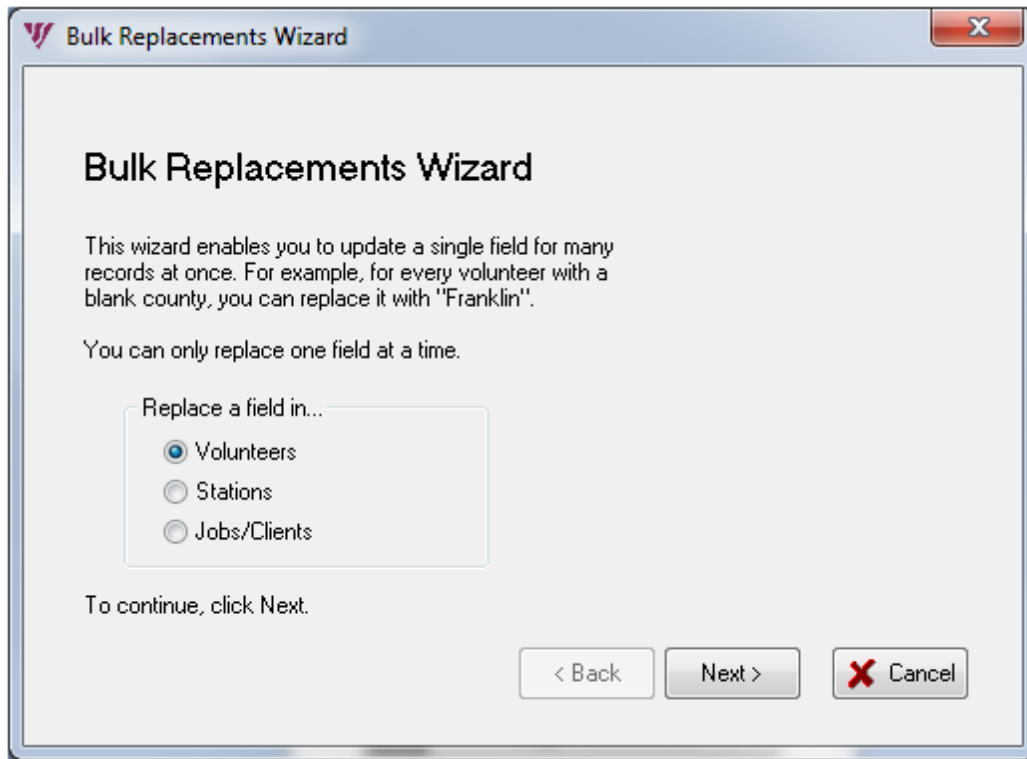
The wizard is easy to use as it guides you through the process. In order to limit the replacement to just of subset of all of your data, select an appropriate filter. You may have to cancel this wizard and create the filter first, unless you have planned ahead. You can only make one replacement at a time.

## 16.10 Delete Old Data

This is a dangerous utility because you can delete good data. Always make a current backup of your data before using this utility so that if something goes wrong, you can restore your data.
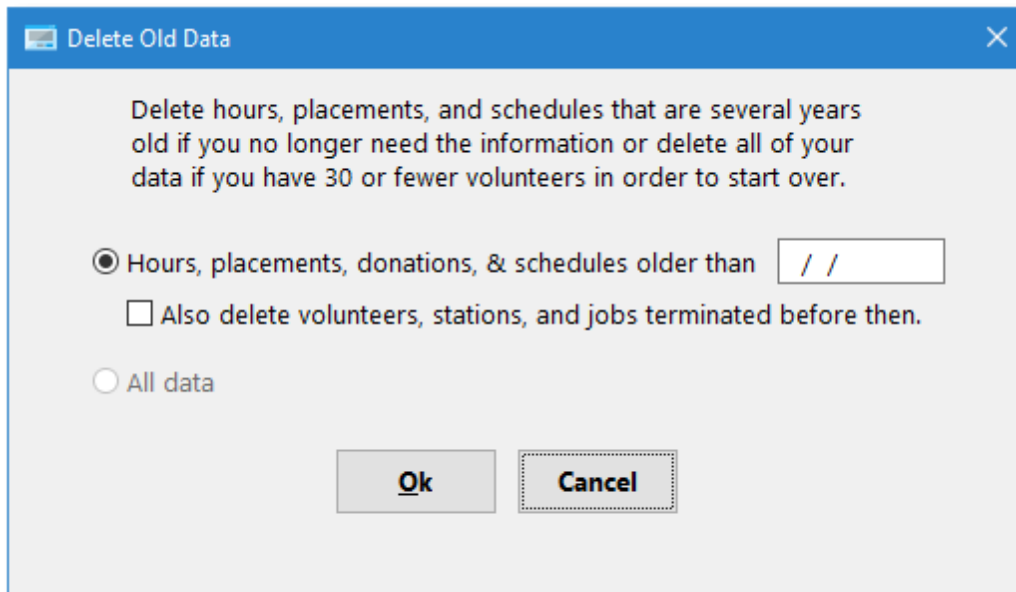
Delete data that is several years old that you no longer need to use. The program deletes information about the number of hours served by a volunteer and old, outdated placements, but will not delete individual volunteers, stations, or jobs which you need to delete one at a time using the appropriate sections of the program.

If you have just started to use the Volunteer Reporter and have 30 or fewer volunteers on file, you have the option to delete all of your data in order to start over.

# 17 Frequently Asked Questions

## 17.1 How do I back date some data?

If the Reporter tells you that you can't enter a date because it is too far in the past, you need to make a simple adjustment. Click on **File | Preferences** and then the **Dates Limits** tab. On this screen you'll see lots of settings designed to help you avoid making silly data entry mistakes like entering 1905 when you meant 2005.

Of course, these helpful limits can also prevent you from correctly entering some older dates. You can turn off checking on certain dates or increase the valid time period. You can even turn off all date checking. Whichever you choose, remember to return here and reset the checking after you are finished entering the older data or you may end up with volunteers who have been serving 103 years.

## 17.2 What's the difference between stations and jobs?

A station is an organization that needs volunteers and is further broken down into one or many jobs. For example, a hospital is a station that might have several jobs. A volunteer serves hours at a job so each station needs at least one job even if you name it the same as the station.

You can access jobs either from the main menu or from the station screen where you will see just the jobs for a single station.

## 17.3 I want to change the list of counties. How do I do it?

Go to Preferences to change any of the available codes. You can also change the heading name.

## 17.4 How do I keep track of other people besides volunteers?

Use Volunteer Groups to assign people to various groups they belong to. For example, a person might be a volunteer and also serve on the Advisory Committee. You can assign the person to both of those groups, then print labels for either group and the person's name will be included. If you choose to print labels for both groups at the same time, the person's name will only be printed once.

Volunteer Groups is a tab on the Volunteer screen. A person can belong to one or several groups. You can change the list of groups from the Volunteer Fields tab on the Preferences screen.

## 17.5 My volunteers attend a yearly training session. How can I keep track of that?

Use one of the user-defined date fields to enter the date when each volunteer next needs to attend the training class. Then create a filter of just those volunteers who need training in the next month or two. Using the same filter, you can print a list and mailing labels of everyone needing training next month.

## 17.6 Why do volunteers have termination dates? Why not just delete them when they move away?

We want to know how many hours our volunteers served during past periods of time. If we deleted volunteers who left, we wouldn't know how many hours they served for us last year. By terminating them instead, we still know how they served us in the past and the Reporter automatically keeps them out of

the way when printing mailing labels or trying to find suitable volunteers for a new job. Once we delete hours that are several years old, we can also delete the terminated volunteers who served those hours.

## 17.7 How do I avoid sending duplicate mailings to my volunteering couples?

Edit either one of the couple's records and uncheck the field "Needs Mailing Label?". Then edit the other pair of records and change the "Mailing Name" field to read "Mr. and Mrs. Jones." When printing labels, limit the report to only include those marked as needing a label so that the couple will receive only one label addressed to both of them.

## 17.8 A name is not alphabetized correctly. How come?

If you mistakenly type a space before the first letter of a person's last name, that record will be alphabetized before all others at the beginning of any list.

## 17.9 On the Hours Served Report some volunteers have zeros for reimbursement.

If the field "Wants Reimbursement This Time?" on the Hours screen is unchecked, they will have hours, but no reimbursement on the Hours Served report. All their reimbursement will be counted as in-kind. On the Volunteer screen there is a default field for this same information.

Another problem might be incorrect settings on the "Reimbursement Limits" tab under Preferences.

## 17.10 On Timesheets, some volunteers and jobs are missing. Why?

This report takes into account the termination dates for volunteers and jobs. If either is not active as of the date of the report, they won't be included on the report. In addition, this report takes into account the volunteer field "Needs Timesheet". If the volunteer is marked as not needing a timesheet, then that volunteer's name will not be printed.

## 17.11 What format is the data stored in?

The format of the data is dBase, version 7.

The data files all have the extension .dbf with a few having an additional file with the extension .dbt. The indexes (which can be remade) have the extension .mdx.

## 17.12 How do I copy a report into my word processor?

Export it as a RTF file which is a universal word processing format.

## 17.13 On my networked computer, I'm not seeing the correct data.

Since the data is located in a shared location on the network, each workstation needs to be pointed to the data so that the Reporter can find the data correctly.

If you're not seeing the correct data, your workstation is pointing to the wrong place and needs to be changed. It is probably pointing to your C: drive when it needs to be pointing to the server drive that has the real data.

To do this, click on **File** | **Select Data Set**. Edit your data set which is probably named "Default" and

enter the location of the data on the network. Use the folder button at the right to open a map of your entire network and point to the data folder.

## 17.14  I use Quattro, not Excel. Can I create spreadsheets?

Currently the Reporter only creates Excel spreadsheets.

# 18    What's New

## 18.1    New in Version 4.2

**Email/Web**
The Reporter now has email fields for volunteers, stations, and jobs. Stations also have web site address fields. You can click on an email button on the toolbar and automatically start an email message to anyone on file.

**Telephone Numbers**
Each volunteer, station, and job has a new, additional phone number. You can identify it as any type of phone such as "Cell", "Mobile", or "Pager". It can be a different type of phone for each person. Now you'll be able to keep track of all those various phone numbers.

**Hours**
You can now change the work date while adding hours. This avoids having to exit from the "Add Hours" screen in order to back date some old hours. When entering work dates, you have a pop-up calendar that you can use to point to the correct date. You can also add hours by station as well as by volunteer and by job. When adding hours one at a time, you can now pick off a list which is much more efficient than the previous drop down list.

**Do-It-Yourself Timesheets**
This new module enables you to design your own timesheets and re-use them month after month. You decide what columns to include and what header and footer to print on every page. Headers and footers are free-form so that you can include return addresses, signatures, or waivers as required. You can design them with one volunteer, station, or job per page in order to fit your unique needs.

This presents a lot of flexibility to allow you to collect hourly and reimbursement information as required by your individual project. Do-It-Yourself Timesheets are shared automatically across your network so that once you have designed a good layout, anyone can print the timesheets when needed.

**Filters**
You can now include the placement date into filters. This enables you to print reports showing just volunteers who started at new placements during a period of time.

You can also include the limitations:
Active volunteers from _____ through _____
Inactive volunteers from _____ through _____

**New Reports**
Stations Profile
This report is a chart of information about stations including addresses, MoU dates, number of volunteers, and BHNs. It fulfills a requirement on the grant application that RSVP's must complete for the Corporation for National and Community Service.

Reimbursements
This lists just those volunteers who need reimbursement during a period of time. It includes their addresses as well as the amount of reimbursement.

Reimbursements Merge File
This merge file includes the same information as on the Reimbursements report, but in a comma-delimited text file suitable for merging with accounting programs. In addition to names, addresses and

reimbursements, it includes all information about volunteers that could possibly be useful when printing checks include SS numbers and user-defined text, date, and number fields.

Volunteer Groups
Similar in format to the Volunteer Skills report, this lists all the volunteers belonging to each group.

**New Spreadsheets**
Reimbursements
This new spreadsheet includes the identical information as the Reimbursements Merge File, but in an Excel spreadsheet format.

**Reports**
Reports are now automatically viewed full screen which enables you to see as much as possible of every page. You can override this behavior in Preferences if you want.

Total Enrollment, Hours, and Reimbursement
This report now always reports the correct number of active volunteers.

Volunteer Addresses, Phones, Birthdates, and Ages
You can now print this report in order by birthdate month and age.

**Spreadsheets**
The spreadsheets Volunteers, Stations, & Jobs and Stations, Jobs, & Volunteers now include the placement starting date. All the spreadsheets that have included names and addresses now include the new email, phone, and web fields.

**Date Limits**
A new tab on the Preferences screen includes options that enable you to avoid data entry mistakes by preventing the entry of dates that are too far in the past or too far in the future. You can set limitations on any or all date fields by simply checking the options and filling in the limiting length of time. For example, you can choose to allow hours to be entered up to three months ago or only one month ago.

You can also choose to not check dates at all or to check them only when adding new records, but not when editing existing records. Each date field in the Reporter is included so that you can choose to check or not to check each individual date field.

**Preferences**
You can now turn tooltips off if you don't like them. Tooltips are the little descriptions that pop-up when you hover your mouse pointer over a toolbutton for a couple of seconds. You can choose to view reports at full screen size or not. You can set a default folder for merge files and report files. The default folder is now C:\My Documents unless you change it.

**Data Utilities**
This new program is automatically installed in the "RSVP Reporter 4" folder and combines together some separate utilities. Using it you can now set the location of your data folder without manually editing your Rsvp.ini file as well as backup and restore your data without starting the Reporter.

**Sample Data**
The installation program now installs a separate icon which accesses some sample data that we supply. This enables you to use sample data for learning and training while keeping your real data separate and protected.

**Data Protection**

The Reporter now prevents reindexing if someone else is using Reporter and also prevents backing up or restoring data if someone else is using Reporter. This ensures that your backups are complete and your data is always clean and protected.

## 18.2   New in Version 5.0

**New Name**
The RSVP Reporter and Volunteer Reporter Professional have been combined together into one program called the **Volunteer Reporter**. It contains all the features of both previous Reporters which means that everyone can schedule volunteers, track impact jobs, assign Basic Human Need codes to jobs and can have several jobs for a single work station.
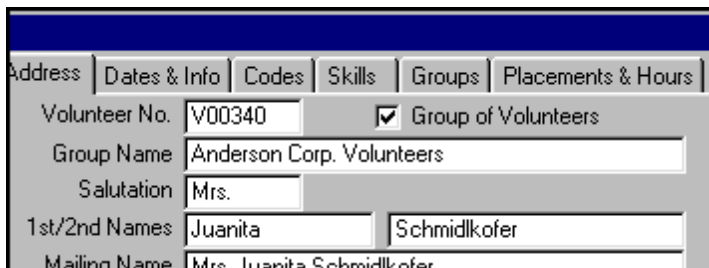
You can turn major sections on or off so that the Reporter is as easy to use as possible. You'll find a "Customization" section under "Preferences" where you can turn on or off entire parts of the program. For example, if you don't want to schedule your volunteers, you can turn that section of the program completely off so that you never even see it.

**Faster**
The Reporter is much speedier. It now starts 200% faster that before.

**Group Volunteering**
A "volunteer" can now consist of a group of people all under one record. For example, you can have a single volunteer called "Boy Scout Troop 35" and keep track of the number of hours the entire troop serves. To accomplish this, you can indicate with a checkmark that a volunteer is a group and then give it a group name.



**Separate Active/Inactive Lists**
You can choose to look at only the active or inactive records. At the top of the volunteer list are three buttons: All, Active, and Inactive. Click on one of them to see just the active or inactive volunteers. This makes it much easier to manage your volunteers because all of the terminated volunteers are on a separate list. As soon as you terminate or un-terminate a volunteer, they move to the other list automatically.



Don't be confused about the terms "Active" and "Inactive". As we are using them here, an "active" volunteer is anyone without a termination date, no matter how much time the person has served.

**Read-Only Password**
The Reporter now has an addition read-only password so you can have some people just look at your

data without changing any of it.

**Redesigned Hours Screen**
The hours screen is completely reworked to make it easier and more efficient. You can add hours quickly, change the workdate immediately, and add missing placements without leaving the hours screen. You can choose to list a volunteer's placements either by job or by station and you can jump between different views of your data very easily.

If you don't reimburse for some items (as indicated on the Preferences screen) those items are completely left off the Hours screen to avoid confusion.

An additional checkmark indicates whether the volunteer drove a car or not. This information is used on the new Car Drivers report. Another new field is the entered date which shows when the hours were actually entered into the Reporter and is kept up to date automatically. The new Hours Data Entry List uses this date to produce a cross check for your data entry.

**Electronic Manual**
We now supply the manual in an electronic form instead of a printed copy. It comes as a PDF file which stands for Portable Document Format and is easy to read on-screen and easy to print. On the screen, you can jump from section to section and then zoom in on any page to enlarge the type. If you still want a printed copy to refer to, you can print out just the pages you need without wasting a lot of paper.

The new manual is installed along with the Reporter. To read it click on **Start** | **Programs** | **Volunteer Reporter 5** | **Volunteer Reporter Manual**.

Almost all computers already have the necessary software to use PDF files, but if yours doesn't yet, you can download the **Acrobat Reader** free from www.adobe.com. Just follow the links that say "Get Acrobat Reader".

**Two Impact Counters**
You can now track two additional impact counts for every job instead of just one. For example, it might be important to keep track of the number of teenagers that were counseled as well as the number of counseling sessions provided by your volunteers serving at a impact job.
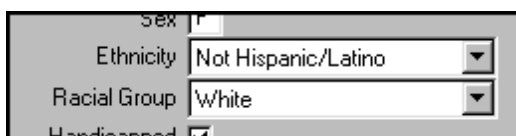
**Better Color Highlighting**
The list of names is now highlighted in color so that you can more easily navigate through your data. No more of not knowing where your cursor is when you press the up or down keys.

**New Ethnic and Racial Codes**
The federal government has standardized on how to report on ethnic and racial codes by splitting it into two codes, Ethnicity and Racial Groups. Ethnicities are only Hispanic or Not Hispanic while racial groups are the more common codes of White, Black, Asian, etc. It is designed so that a person could be both Hispanic and White or Hispanic and Black, for example. The Reporter now follows this federal standard.



Your existing ethnic codes are transferred to these new codes automatically when you upgrade. Because these codes replace your previous ethnic code, you now have one additional user-defined code for volunteers which used to hold the ethnic information.

### New BHN and Station Type Codes

To match the requirements from the Corporation for National and Community Service for RSVP's, the Reporter now includes the most up to date Basic Human Need codes as well as Station Type. All of your existing codes for these items are automatically upgraded to the new codes. Both codes are lengthened to allow for the longer codes and the codes themselves are separated from the descriptions to make it super easy to upgrade them yourself the next time the Corporation changes them. Transferring the station type frees up an additional user-defined code for each station.

### Restarting Volunteers

You can now start and stop a volunteer multiple times. Instead of just one starting date and one termination date, you can start and stop a volunteer as often as needed. No matter how many times a volunteer starts and stops, the Reporter correctly calculates the years and months of service which is shown right on the volunteer screen as well as on the Years of Service report.



### Lifetime Hours

You can now keep track of hours served by each volunteer over a lifetime. This new field is on the volunteer screen and is kept up to date automatically every time you add new hours.



When you upgrade your data the first time, the Reporter populates the lifetime hours for every volunteer with a total of all the hours on file. Since you may only have a few years of data in the Reporter right now, you can edit the lifetime hours for any volunteer to make it accurate with hours from previous years that aren't in the Reporter. These lifetime hours are now included on the Years of Service report.

### Driver's License Expiration

This is a new field for volunteers so you can remind your volunteers when their driver's license needs to be renewed.

### Health Care Facilities

Stations now have a checkmark indicating whether the station is a health care facility or not. This information is used on the stations profile.

### New Filter Options

You can now filter by the number of hours a volunteer has served over a period of time, Driver's License Expiration, Lifetime Hours, the new Ethnicity and Racial Groups, and whether a Station is a Health Facility or not.

### Placements Improvements

Click on the column headings for Volunteer or Job in order to sort the list and when adding placements,

you can view either jobs/stations or stations/jobs.

**Schedule Improvements**
On the Details tab, click on the column headings for Volunteer or Job in order to sort the list.

**Timesheet Improvements**
You can choose to not print columns for impact counts on timesheets.

On <u>Timesheets by Job</u> the columns for impact counts are printed as the actual item being counted instead of just "Count". They are also automatically left off if not used for that particular job.

Better underlining makes for more readable timesheets.

**Report Improvements**

You can now print the <u>Stations Profile</u> report for a period of time. It is up to date with all the requirements of the Corporation for National and Community Service including phone, email, and health care facilities. It also totals the number of active volunteers for the period.

The <u>Years of Service</u> report now includes lifetime hours.

On the <u>Volunteer Description</u> report skills and groups are always listed in alphabetical order.

On the <u>Hours Served by Detail</u> reports you now have the option to print subtotals.

The two reports, <u>Station Hours by Volunteer</u> and <u>Job Hours</u> (which is only available when stations are turned off), both now total the number of volunteers at the station or job.

You can now print the <u>Job Description</u> report in order by station as well as by job.

All of the <u>Volunteer Address and Phone</u> reports can include comments now.

On the <u>Volunteers and Jobs</u> report the total count of volunteers is included.

<u>Car Drivers</u> is a new report that lists people who drove during a period of time. It uses the new checkmark on the Hours screen called "drove car". You can use this for insurance purposes.

<u>Hours Data Entry List</u> is a new report showing the hours entered today. It is based upon what date the hours were entered into the Reporter, not the date the hours were served. Use this report as a cross check on your data entry. For example, after adding a batch of hours for the day, compare the printed data entry forms with this report to catch any data entry mistakes.

**Spreadsheet Improvements**
On the <u>Reimbursement</u> spreadsheet there are now columns for the breakdown of reimbursement, not just the total. There are now columns for mileage, meals, bus, etc.

On all <u>Hours</u> spreadsheets you now have the option to include details about either the volunteer, station, or job.

All <u>Hours</u> spreadsheets now include the value wage.

There is a new spreadsheet called <u>Volunteer Skills</u> that shows all skills for each volunteer.

## 18.3    New in Version 5.1

**New BHN Codes**
The Reporter includes a conversion utility to upgrade your BHN codes to match the current, official list
from the Corporation for National and Community Service. They recently added 29 new BHN codes and
changed the numbering of 79 others, leaving only one code unchanged. This only applies if you are an
RSVP, FGP, or SCP project, otherwise it is probably not important.

**To upgrade your BHN codes**, start the "Volunteer Reporter Data Utilities", a separate application
installed with the Reporter. Click on **Start | Programs | Volunteer Reporter 5 | Volunteer Reporter
Data Utilities**.

**Word Timesheets**
The Reporter has always offered up many different styles of timesheets for your choosing including Do-It-
Yourself Timesheets, but now we've added the ultimate in creative timesheet design -- integration with
Microsoft Word to produce any timesheet you require. By combining the flexibility of Word to layout your
timesheet and the automation of the Reporter to merge in your data, you can produce any possible
timesheet for your volunteers, stations, or jobs.

| Job Name: Inventory and Stocking<br>Supervisor: Mary Watkins<br>Phone: (217)392-3924 | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| **Volunteer** | | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 |
| Roberta Abernathy | Hours | | | | | | | | | |
| | Mileage | | | | | | | | | |
| Wanda Arnold | Hours | | | | | | | | | |
| | Mileage | | | | | | | | | |
| Margaret Barnett | Hours | | | | | | | | | |
| | Mileage | | | | | | | | | |

We've already done a lot of the work for you by supplying over a dozen sample timesheets from which to
build. Start with one of the samples, make a few changes, and you'll end up with a great timesheet you
can use every month.

We use several obscure features in Word to produce timesheets, so even if you are a Word expert, you'll
want to read about how to create Word Timesheets under Job Reports.

**Accurate "Last Page" When Previewing Reports**
Now, when previewing any report, the "last page" button takes you to the exact last page of the report
every time. The Reporter used to estimate the last page in order to jump ahead more quickly, but was
often inaccurate. Now the Reporter takes a little longer, but always jumps ahead to the exact last page.
If you liked it better before, you can use the new "Settings" button to do it the old way.

**Bad Filter = Canceled Report**
When you get that dreaded message, "Sorry, but this filter yields no records", the report now cancels
immediately instead of showing all the records. You still need to adjust your filter, but at least you don't
have to wait for the report to finish. Now if we could just make the Reporter read our minds and create

the filter for us...

## Letters and Envelopes

Through integration with Microsoft Word, you can now create form letters to use at various times. For example, you can create a letter for new volunteers, one as a reminder for a monthly board meeting, and another for volunteers needing a renewal. Then from within the Reporter print the letter addressed to an individual without leaving the Reporter. You can print the letters one at a time or for a filtered group of volunteers.

Creating a form letter is not difficult. We supply several samples for you to start with when creating new ones. After you create the letter in Word, the Reporter automatically merges in the volunteer's name, address, and any other information you specify and then prints it. It's quick and simple. Once you create a good form letter you can reuse it whenever needed and you can share it automatically with everyone else in your office.

Have you ever wanted to quickly print an envelope for a single volunteer? Now you can with one click of your mouse. It's just like printing a letter, but easier. We've already supplied the form needed for a standard business size envelope so you're all set to go.

### Monthly Hours Reports

These handy new reports show the hours served for every month over any twelve month period of time. You can use this to discern service patterns for your volunteers, stations, or jobs over an entire year.

### Better Color Usage

All screens and components of the Reporter now display correctly when the computer is using the color scheme "High Contrast Black", which can be useful for some people with low vision.

## Group Email Messages

Since version 4.2, you've been able to send email messages to individuals, but now you can also easily send the same email to a group of people at once. You can apply any filter to a group of volunteers, stations, or jobs and then automatically open your email program and paste all of those selected email addresses in either the TO: or BCC: fields.
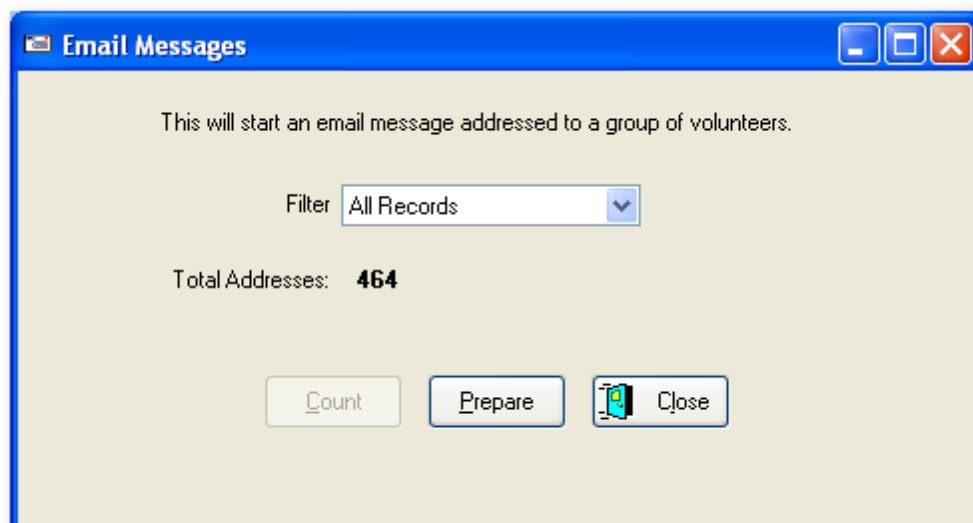


### Scrolling Comments

You can now scroll through long comments without having to edit the volunteer, station, or job record first.

**Placements Improvements**

You can now add new placements from the volunteer screen. On the "Placements and Hours" tab, you can click on the **New Place** button to add placements for this volunteer.

When adding new placements, whether from the placements, hours, or volunteer screens, the Reporter maintains alignment on the same volunteer record so you don't have to go searching a second time for the same volunteer.

**Job Description List for Web**

This is a new "report" that doesn't ever get printed on paper. It is designed as a quick and easy way for you to post job opportunities on your web site. It is a short, concise list of jobs in a table format that you can easily copy to your web site at regular intervals. For example, you can prepare this report and update your web site with it every week. It's so simple you can do it in five minutes, tops.

| Job | Contact | Phone | Description |
|---|---|---|---|
| American Red Cross | Joyce Hall | (217)774-4122 | RSVP volunteers will make calls Bloodmobile will be in the area a |
| Appalachia Project | Orris R. Gilles | (217)728-4098 | RSVP members will volunteer to for the Appalachia Project and w accordance with their abilities to |
| Arthur Home | Lilly Schmalzried | (217)543-2103 | RSVP volunteers will help within to do so by aaaisting with planne for seniors, providing transportat |

You choose which columns to include, select several size and dimension settings, and create a file on your hard disk in the format of the web (HTML). Copying this file to your web site is a simple process called FTP. Your web designer can show you how to do it, but it's basically as easy as copying a file from one computer to another on your network.

**Hours Improvements**

The date limits you set in Preferences prevents hours from being added too far in the future or the past.

When you edit a volunteer's name, the new name immediately appears in the Hours screen without having to reindex the files.

**DYMO LabelWriter Support**

If you own a DYMO LabelWriter, the Reporter enables you to print mailing labels on it. DYMO (www. dymo.com) makes several models of LabelWriters which are specialty printers that print just labels that come on rolls. They are handy for printing labels one at a time or for larger groups of labels. The Reporter now supports this popular label printer and will automatically detect if one is attached to your computer.

**Report Improvements**

You can create a HTML file directly on a floppy drive without having to first save it to the hard drive.

The report Volunteer Addresses, Phones, Birthdays, and Ages can print the volunteer's name either with or without the salutation.

The Volunteer Description report can now be printed for a group of volunteers from the Reports menu as well as for a single volunteer from the Volunteers screen. Also, sometimes strange characters were printed in the comment fields on this report as well as on the Job Description report, but no more.

On the Stations Profile report there were some extra zeros printed in the volunteer column that meant nothing, but were confusing. They're not there any more.

The Inactive Volunteers report has been changed to correctly categorize a volunteer who has no active placements as of the end of the time period, but who served hours during the time period.

All reports have been optimized and many will now run faster.

### Duplicate BHN Codes Removed
When upgrading from a previous version of the Reporter sometimes all the BHNs would be duplicated with 999 codes. Now that doesn't happen and the duplicates are removed automatically.

### Windows XP Improvements
The Reporter already ran perfectly under Windows XP, but now it always finds the "My Documents" folder used for HTML and merge files no matter which user is logged in.

### Reimbursement Limits
You've always been able to indicate monthly limits for reimbursement amounts on the Preferences screen, but until now you could not indicate that all requested reimbursements should be counted as in-kind. You have had to include at least one penny as a monthly limit, but now by checking that you have a monthly limit, but the monthly limit is zero, all requested reimbursements will be counted as in-kind contributions.

### Closer Reference Manual
You can now open the reference manual right from within the Reporter. Just click on **Help | Reference Manual** to open the electronic manual.

### Miscellaneous Improvements
The term "Handicapped" is now "Person with Disability".

It used to be that if you reassigned a job to a different station, the change didn't show up on the placements screen until you reindexed the files. Now it does.

The spell checker worked intermittently on some computers. Hopefully, we have this licked.

## 18.4   New in Version 5.2

**Extra Space for Long Names**
We've given you more space to enter long volunteer names, station names, job names, as well as street addresses and cities. This means less creative abbreviating for you.

**Two Addresses for each Volunteer**
Each volunteer now has two mailing addresses available and you can choose which one to use for mailings. This makes it very easy to keep track of your mobile volunteers. You'll find a new tab called "Addresses" on the Volunteer screen where you can enter a second address for each volunteer and switch which address is to be used for mailings.

For example, when a volunteer leaves for the winter, you can switch them to their "winter" address so that they will continue to receive mailings from you while they are gone.



**Additional Contacts**
You can now keep track of three additional contacts for each volunteer such as emergency contacts, parents, beneficiaries, or physicians. You can choose to keep track of different types of contacts for each volunteer. For each of these contacts, you can enter their address and two phone numbers. You'll find these additional contacts on the new "Addresses" tab. Print a volunteer's addresses and emergency contacts with the Volunteer Description report.

**Years of Service Report**
You can now print this report as of any date, not just today.

**Letters and Envelopes Improvements**
You can now print letters and envelopes for stations and jobs as well as for volunteers. You can also print a letter for a single, terminated volunteer if you need to. In addition, letters and envelopes now work with fields that include quotation marks such as Robert "Billy" Anderson and you can print two or more different letters for a single volunteer.

**Performance Measurement**
Impact jobs now include both intermediate and end outcomes as specified by the Corporation for Community and National Service for performance measurement.

**Service Categories**
Basic Human Needs (BHN) have been renamed to Service Categories. The codes are the same as there have been no changes made by the Corporation for Community and National Service in the past year.

## Pop-Up Calendars

Every date field in the Reporter now includes a pop-up calendar. When you click on any date field, a calendar button appears next to the field. Click on that button to pop-up a calendar to use to enter the date.
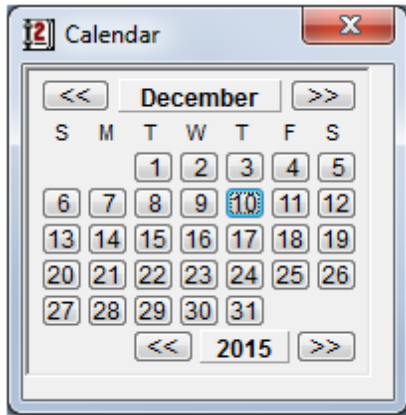
The pop-up calendar only appears when you click or tab into a date field and disappears as soon as you leave the field. As a shortcut, you can also double click on the date field or press the letter "C" (for calendar) to open the calendar.

A volunteer's birth date is the only exception that doesn't have a pop-up calendar. It is not practical to enter birth dates by using a pop-up calendar because birth dates are so many years in the past.

### Phone Number Extensions

All telephone numbers can now have extensions. Each phone field has been lengthened to enable you to enter an extension after the number.

### International Settings

For our international neighbors, the Reporter can now be customized for any country's address, telephone, date, and currency formats. For example, the Reporter can now handle dates in the DMY or YMD formats instead of just MDY. In addition, you can change the "Social Security Number" to match any country's universal insurance or identity number. On the Preferences screen is a new "Country" tab where you can set all of these options.

## Data Sets

The Reporter now enables you to have multiple, separate sets of volunteers. You've always been able to categorize people into separate groups like "volunteers" or "advisory board", but now you can maintain totally separate sets of data. You can have an unlimited number of data sets each with its own volunteers, stations, jobs, and hours.

For example, you can keep a data set called "RSVP" and a separate data set called "FGP". Or you can track data sets called "Franklin County", "Teenage Volunteers", or "Mandated Volunteers". Each data set is completely separate and you cannot transfer people from one to another. If you have the same person entered into two data sets and you need to change their telephone number, you'll have to change it in two data sets. Therefore, these data sets are not designed to replace the existing "grouping" feature built into the Reporter, but as an additional method to track unique sets of data.
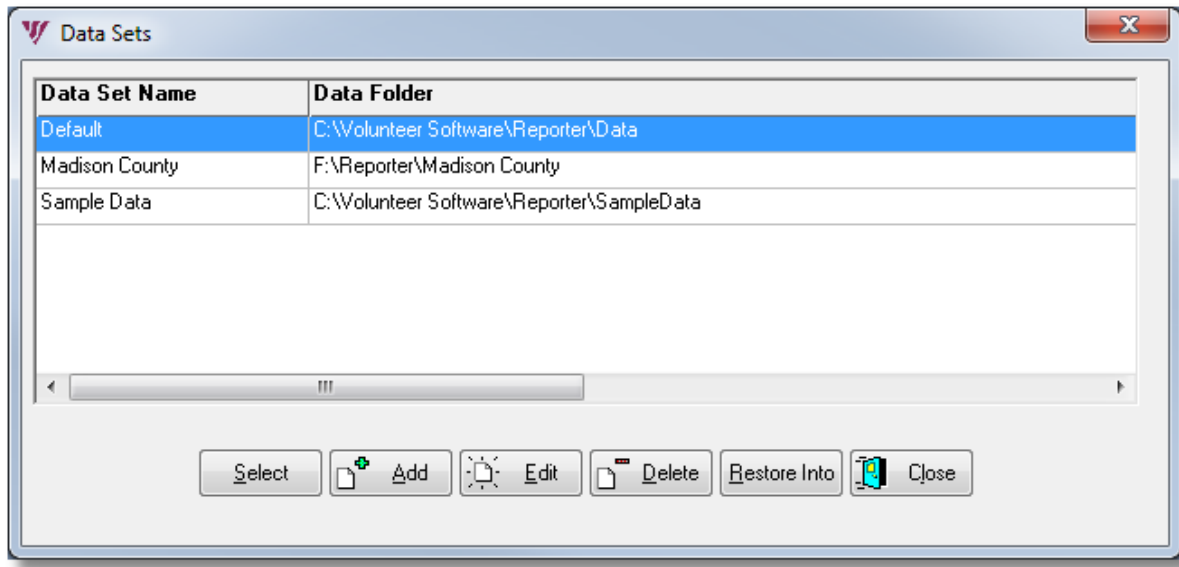
Switching between data sets is very easy. On the File menu is a new option called "Select Data Set". From here you can switch between data sets as well as create new data sets. Your existing data has been put into a data set named "Default" and if you have sample data installed on your computer it has been put into a "Sample Data" data set. You can switch to the sample data in order to train new users of the Reporter.

You can change the name of your main data set from "Default" to something more meaningful. When any data set other than the "Default" data set is selected, its name is included on the top title bar such as "Volunteer Reporter – Madison County".

Each data set is installed into a separate folder on either your computer or another computer on the network. To create a new, empty data set, simply add a new set, name it, and enter a folder location. The Reporter will create the folder and fill it with empty data if it doesn't exist. For example, you could create a new data set named "Teenagers" into a new folder called C:\Reporter\Teenagers.

When you backup your data by clicking on File | Backup, you are backing up just the current data set and when you restore data, you are restoring to the current data set as well. Because of this, you can transfer all data from one data set to another by backing up one, switching to the other data set, and restoring. Make sure to keep your backup disks clearly labeled so that you know which data set is on the diskette because the actual backup file from any data set is always named "VrData.zip".

There is no way to combine data sets together into one. For example, if you keep data from two separate counties in two data sets and you want to know how many hours were served in both counties combined, you have to run reports from each data set separately and manually add them together.

There is also no way to transfer a single volunteer from one data set to another. If a person is moving from your "Under 55" data set to your "Over 55" data set, you have to terminate the person in one and manually add them into the other.

**New Speller Module**
The speller module didn't work on some computers. We've now switched to a new speller technology that works well for everyone.

**Miscellaneous Improvements**

If you create a backup on an Iomega Zip Drive or other removable media other than a floppy disk, it no longer erases the disk before creating the backup. On floppy diskettes, the Reporter still erases the entire floppy before creating the backup.

Volunteer numbers of less than six digits now advance correctly. For example, a volunteer number of 2000 will now correctly advance to 2001.

On the Do-It-Yourself Timesheet, if the first 20 characters of two separate stations were the same, the timesheet didn't print correctly. Now it does.

On the Monthly Hours by Volunteer Report, if you chose to "include volunteers with zero hours", the Reporter incorrectly excluded some volunteers with zero hours.

The Reporter now prevents two filters from sharing the identical name which caused inaccurate results because you would think you were using one filter while the Reporter would sometimes use the other one. Please check your existing filters and change the names of any duplicates.

In Word Timesheets if a volunteer, station, or job had no valid placements you got an error from Word. Now you don't.

## 18.5   New in Version 5.3

In version 5.3 of the Volunteer Reporter, we spent most of our time improving and expanding reports, as they are the primary method of retrieving and compiling vital information. We upgraded the creation, viewing, and presentation of reports. We also developed numerous new reports and modified existing reports. Below is an overview of the upgraded reporting features as well as other valuable additions to the Volunteer Reporter all designed to make it more powerful and user-friendly.

**MORE HELP**
For more details on these new features, click on Help and then either Help Topics or Reference Manual. Both the on-line help (Help Topics) and electronic reference manual (Reference Manual) are identical. In either one, refer to Reference | Reports in order to learn more about the new reporting features and how best to use them.

**UPDATING THE REPORTER**
One of the most exciting new features is "live update". You may be familiar with this feature through your anti-virus software. With a single click from within the Reporter, you can automatically check on the Internet for new changes, fixes, or upgrades to the Reporter. It's free and easy.
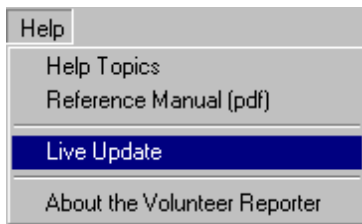


Click on Help | Live Update and the Reporter will check for updates. If found, the update will be automatically downloaded, installed, and distributed to every other computer on your network. This exciting new feature enables us to easily pass on changes and improvements mid-year between our annual updates. It also allows us to fix any problems found in the Reporter.

**EXPORTING / EMAILING REPORTS**
You are no longer limited to just printing reports. They can now be exported in numerous file formats including:

• PDF (Adobe Acrobat Reader)
• Word (RTF)
• Excel
• HTML
• Bitmaps

This option will allow you to share reports with others. In addition, you can now email reports. These two upgrades work hand-in-hand as you can now export a report as a specific file type and email it to others.
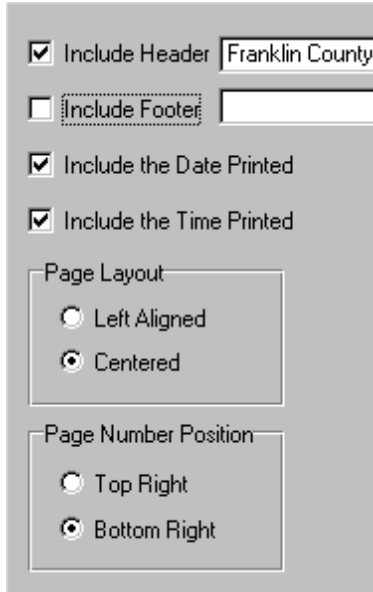
**QUICKER PREVIEWS AND IMPROVED SCROLLING**
Improvements have been made to the preview screen of reports. When you choose to preview the report, a preview screen will appear with thumbnails of the report in the left column. These thumbnails represent each page of the report which allows you to easily choose the specific page you would like to view.

The reports themselves are also easier to read as lines have been added to separate rows and columns. By using your mouse's wheel, you can also easily scroll to the top or bottom of these reports for easier viewing.

## CUSTOMIZING REPORTS

By clicking on the new Layout button available on every report, you can now add an optional header and footer, allowing you to customize reports with the name of your organization, for example.

☑ Include Header | Franklin County

☐ Include Footer |

☑ Include the Date Printed

☑ Include the Time Printed

Page Layout
○ Left Aligned
● Centered

Page Number Position
○ Top Right
● Bottom Right

You can also change the page layout with options to:
- Include the date and/or time printed.
- Either center the headings or left align them.
- Print the page number at either the top or bottom.

These layout changes will affect all reports so that every report from your office has the same layout.

## NEW REPORTS

Mileage by Volunteer.
Volunteer Email List.
Volunteer Phone and Email List.
Station Phone and Email List.
Station Email and Web List.
Job Email List (only if you have stations turned off).
Job Phone and Email List (only if you have stations turned off).
Station Address, Phone, and Email List.
Totally Inactive Volunteers.
Partially Inactive Volunteers.
Volunteers without Placements.

## MODIFIED REPORTS

We made numerous improvements to existing reports. The following list outlines these newest features:

- Either a volunteer's first or last name can now be listed first on most volunteer reports. You can also choose whether or not to include the salutation.

- An additional phone number column was added for cell phones, pagers, etc.

- The Volunteer Groups report now includes email addresses.

- As you know, there are several different types of inactive volunteers.  Therefore, we split the confusing Inactive Volunteers report into three separate reports: Totally Inactive, Partially Inactive, and Volunteers Without Placements.
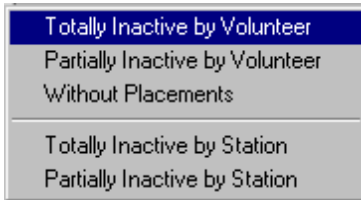


- A comments box was added to many station reports.

- The Years of Service report can now be sorted alphabetically by volunteer.

- You can now specify which fields to include in Volunteer Description, Job Description and Station reports. This offers flexibility in how these reports are displayed. You can produce a one page listing for each volunteer showing just the exact fields you want to include. It's a very powerful addition.

- The Job Description report provides space to include the impact elements.

- As with Volunteer and Job reports, you can now print the Station Description report for all stations as well as just for one station.

- The Total Enrollment, Hours, and Reimbursement report has been split into two separate reports: *Total Enrollment and Hours* and *Total Reimbursement and In-kind Contributions*.
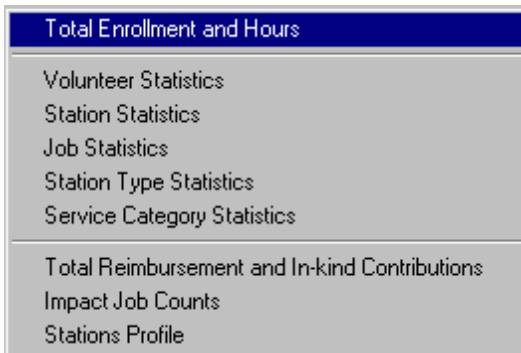


- The new Total Enrollment and Hours report has been extensively modified to give you the most important numbers about your project all on one report.

- The Project Profile report has been split into three reports: Volunteer Statistics, Station Statistics, and Job Statistics.

- The Data Entry List has been split into three reports: by Volunteer, by Station, and by Job.

- The list of Service Categories and Station Types can be printed in order by code as well as in alphabetical order.

- The Do-It-Yourself Timesheets no longer contains extra space between columns, allowing you to widen each column.

- Both the Reimbursements spreadsheet and the Reimbursements merge file now include the number of miles driven by each volunteer.

**USABILITY IMPROVEMENTS**
If your display is set at 800 x 600 or higher, you can now widen the Reporter's screens as wide as your screen will allow for complete viewing of longer names.

Entering hours has never been easier.  The numbers you enter will be automatically formatted for the space, allowing you to enter hours without having to use the backspace or delete keys.

## 18.6   New in Version 5.4

**Web Assistant**
The Web Assistant is a new subscription service that enables your volunteers to enter their hours from home and also enables interested people to apply to be volunteers online.

**Update Look and Feel**
If you use Windows XP, you'll notice the Reporter is now more attractive with brighter colors, rounded corners, and better highlighting.

**Mailing Labels for Birthday Cards**
We made it easier to produce mailing labels for birthday cards, since this is so common. You don't have to use a filter any more if all you want is mailing labels for people with birthdays in a certain month. You can also choose to print the birthday month and day right on the label to make it easier to mail them at appropriate times.
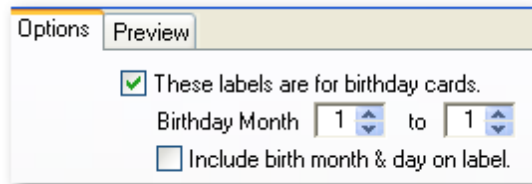
**Find a Volunteer**
Finding a volunteer is now a completely searchable grid. Now, when you click on the Find button of the volunteer screen...

...you are presented with a full screen grid of all of your volunteers. Click on any column heading like "1st Name" in order to sort the volunteers by that column. This makes it very easy for you to find a person by any of their information including phone number, email address, and social security number.

**Statistical Reports**
We changed all the "statistics" reports to have the option to "include records with 0 hours". These five reports, Volunteer Statistics, Station Statistics, Job Statistics,  Station Type Statistics, and Service Category Statistics, all now have an additional check mark you can use to include records with zero hours. Normally, we want to see statistics for just active volunteers who served hours during the time period, but this new option can be useful if you don't keep track of hours with the Reporter or have a lot

of volunteers without current hours.



**Filters**
We made the creation of filters more intuitive and easier to understand. All of the limitations for volunteers are located on a single tab and setting or clearing any single limitation is more straightforward.
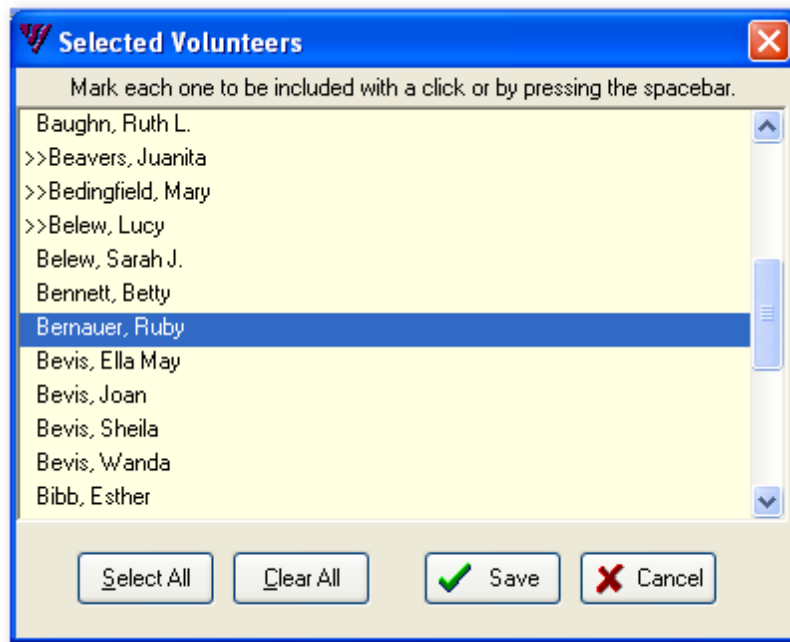


**More Volunteer Date Fields**
We added four more user-defined date fields for volunteers for a total of six. You can use these for any purpose like keeping track of various expiration or due dates. Just as with all user-defined fields, you can rename any of these, too.

**Station Mailing Labels**
Just like with volunteers, you can now easily choose to not include some stations when printing mailing labels. On the Stations screen, you can mark any station as needing a mailing label or not.



Then when printing labels for stations, normally only those with a check mark will be printed.



**Performance Adjustments**
On the Preferences screen, we included a new Performance tab where you can adjust settings that can speed up the Reporter.



**Station Roster Spreadsheet**
To match new requirements from the Corporation for National and Community Service, the Reporter now automatically generates a correctly formatted file name for your station roster spreadsheet which is based upon the name of your project, the type of project, and your state. The Reporter saves this spreadsheet in your "My Documents" folder.

The Station Roster spreadsheet no longer wraps after line 96. This corrects an error with the original spreadsheet supplied by the Corporation for National and Community Service.

On the Station Roster spreadsheet, if you neglect to enter your project name when asked, the Reporter no longer pops open an error message, but instead just leaves the project name blank on the resulting spreadsheet.

**Miscellaneous Improvements**
The electronic manual is formatted better for printing with a table of contents and page numbers.

Data in spreadsheet cells are no longer padded with extra spaces.

If a volunteer has two placements at the same station, terminating one will not remove both from the Hours entry screen.

For clarification, the Years of Service report now includes a notation that the lifetime hours listed are calculated as of today, not the "as of" date. The years of service are calculated as of the date you choose, but the lifetime hours are not recalculated, but taken straight from the Volunteer screen. This is not a change, just a clarification.

In Reimbursements Merge files the Car Miles and Reimbursement columns are now correctly delimited by a pair of quotation marks.

## 18.7 New in Version 5.5

### Passwords and Security

We have replaced the simplistic, four password security scheme with a full, customizable password system where every person using the Reporter can have their own user name, password, and individualized access levels for every section of the Reporter. As always, you can choose to not use passwords at all when starting the Reporter, but for those who need it, this enables custom security access for every user.
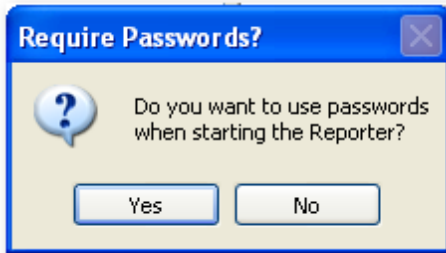
Each user can have their own user name and password. Only you can change either their user name or password which prevents them from choosing simple passwords that might be easy to guess. You can add an unlimited number of users, of course.
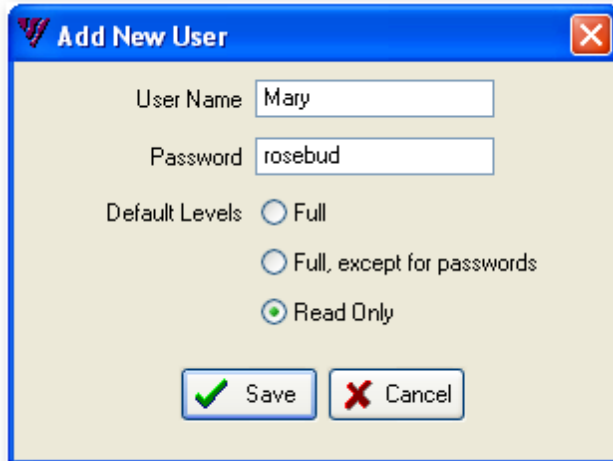
Access levels for every section of the Reporter can be customized for each user. You can give a user "read only" access to certain parts of the Reporter and no access at all to others sections. It is fully customizable for every user.

When starting the Reporter, users are asked for their user name and password. Neither user names nor passwords are case sensitive so you don't have to worry about your users getting stuck because they

have Caps Lock on. Based upon the access you've given them, certain sections of the Reporter will be completely turned off or available for them to only read the data without changing it.



**User Defined Fields**

The Reporter has always enabled you to change the names of some fields. These are called user defined fields and are located on the Codes tab of volunteers, stations, and jobs. Now we have enhanced these user defined fields in four ways.

1. There are many more user defined fields.
2. You can turn off unused user defined fields that you're not using.
3. You can rearrange the order that user defined fields are shown on the screen.
4. For user defined number fields, you can choose how many decimal places to show.

We have added enough user defined fields that you will never run out. For volunteers, you have fifteen code fields, five text fields, six date fields, and four number fields. For both stations and jobs, you have nine code fields, and three each of text, date, and number fields.

With all these additional user defined fields the screen can feel crowded, so we have given you the option to turn off fields that you are not using. If you are only using five user defined code fields for volunteers, you can "uncheck" the other ten so they are not shown on the screen. For the user defined fields that you are using, you can choose the order they are listed on the screen in order to match your paper intake forms, for example.



User defined codes are always in the left hand column while user defined text, dates, and numbers are in the right hand column so that you can align a code field with a matching text, date, or number field. For example, you can line up a code field for a required training class with the due date for the same class.

Training 2006 ▼ Training Due 11/10/2007

For user defined numbers you might want to only allow the entry of whole numbers sometimes so we enable you to choose how many decimal places to use for each field.

| Children | 3 |
| Donated $ | 75.00 |

**Age Groupings**
The Corporation for National and Community Service has changed the requirements for reporting statistics based upon age groups. The requirements are different for RSVPs and FGP/SCPs so we include options for everyone on the Volunteer Statistics report. If you are not managing one of these types of federal programs, you can still use the normal breakdown of every five years which counts all volunteers from the youngest to the oldest.

Age Groupings
◉ Every five years
○ RSVP Standards
○ FGP/SCP Standards

**Placements History Report**
We developed a new report under statistics to show placements that were active during a period of time. For example, if you choose to run this report for last year, it will include placements that are terminated today, but were active during any part of last year. It can help you get a handle on what your volunteers are doing currently compared with what they were doing previously.

In addition, we enable you to sort this report in any of seven different ways. You can change the sort order to focus on placements from the viewpoint of volunteers, jobs, or stations. It's like having seven different reports and really enables you to get a handle on your placements.

Sort Order Volunteer, Job ▼
Volunteer, Job
Volunteer, Starting Date
Job, Volunteer
Job, Starting Date
Station, Job, Volunteer
Station, Volunteer, Job
Station, Starting Date

**Volunteer Description Report Includes Placements**
The volunteer description report now includes each volunteer's current placements.

| Skills | Answering Telephone , Information Desk , Office Filing |
|---|---|
| Groups | Advisory Board , Volunteer |
| Placements | Immunization Calling at Lake County Health Deptartment |
| | Teacher's Aide at Sullivan Elementary School |
| Comment | Roberta is a member of the RSVP Advisory Council and is a S |

### Additional Station and Job Contact People

We added an additional contact person for both stations and jobs. This enables you to keep track of two people for each station and job which has been a common request. We also added an optional title for both contacts to enter the person's job title or description.

| | Salutation | First Name | Last Name | Title |
|---|---|---|---|---|
| 2 Contacts | Mr. | Warren | Huffman | Exec Dir |
| | Ms. | Julie | Warren | Vol Coord |

### Additional MoU Date

We added a third Memorandum of Understanding Date for stations and slightly renamed the original two in order to make it easier to track when each station's MoU next needs to be renewed. You can use any of these dates in filters in order to find exactly the stations you're looking for.

| MoU Originally Signed | 05/08/1997 |
|---|---|
| MoU Last Renewed | 05/08/2006 |
| MoU Next Renewal | 05/08/2007 |

### Adding New Jobs is Easier

When adding a new job, the Reporter now enables you to copy some data directly from the station. You can have the phone numbers, email address, and contact names duplicated from the station without having to reenter the same information.

**Copy from Station?**

Do you want to copy details from this station?

Yes    No
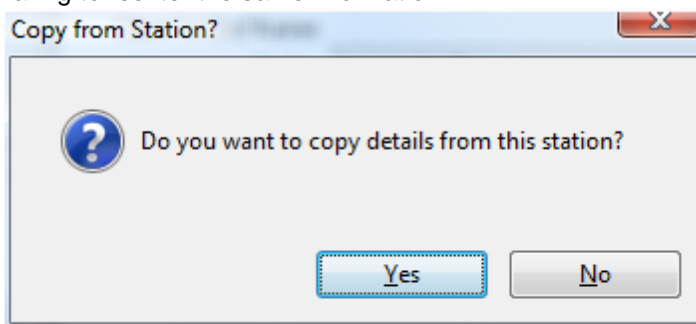
### Faster Filters

We concentrated on improving the speed of filters. These internal changes don't change the way you create or use filters, but will speed up reports when you use large or complicated filters.

### Additional Windows XP Support

We have continued to include more support for the look and feel of Windows XP throughout the Reporter which include color schemes, font selections, button shapes, and screen designs. These are subtle changes, but will carry over directly into the next version of Windows due to be released next year called Vista.

### Previewing Reports

When previewing any report on the screen you can now jump ahead to any page as well as moving forward one page at a time as you've always been able to do. You can also zoom in the preview even more than before, up to 3000%, where a single letter fills the entire screen.

### Minor Changes

We have removed the three digit codes for Service Categories as well as the two letter codes for Station Types. Now you refer to both Service Categories and Station Types by name which makes it much easier to find the one you're looking for. Both of these codes were holdovers from past requirements of the Corporation for National and Community Service.

When you terminate a volunteer, the number of positions filled for the job is now correctly reduced by one.

When you change a station's name the change immediately is reflected throughout the Reporter.

When finding a volunteer, station, or job by typing it's name, the selected record now always shows and is no longer sometimes just off of the bottom of the list.

All MoU dates are always shown on the Stations Profile report even if one of them is empty.

In the Web Assistant, the counted number of volunteers about to be sent is now always correct and terminated jobs are not sent.

When running any of the Hours Served reports with zero hours included, terminated placements are not included.

On the Addresses tab of Volunteers, the first address line for each additional contact is renamed to "Name" instead of "Add 1".

The Stations and Jobs spreadsheet no longer includes terminated jobs.

Whether a station needs a mailing label or not is now available for filtering.

All filtering limitations are listed in the same order as they are on the screen.

All new user defined fields are available for merging into Word letters.

User defined text fields are lengthened from 15 characters to 40 characters.
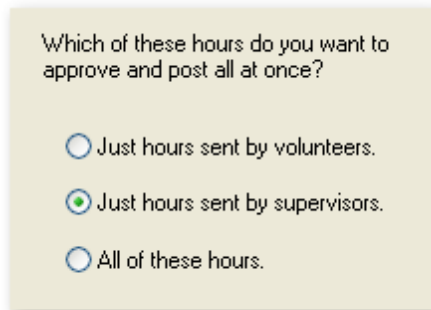
User defined number fields lengthened to accept numbers up to 999,999.99.

On the Stations screen the "Dates, Info, & Codes" tab was split into two tabs, "Dates & Info" and "Codes".

## 18.8 New in Version 5.6

<u>**Web Assistant Improvements**</u>
The Web Assistant now enables station supervisors to enter hours for all of their volunteers. This new feature is in addition to enabling volunteers to enter hours from home. Now, one supervisor can scroll through a list of their volunteers and enter hours for each in turn. When you receive the hours, you can see who entered the hours, either the volunteer or the supervisor before you approve them. Then you can choose to approve just hours sent by supervisors, by volunteers, or all hours at once. You give each supervisor that you want to enter hours their own username and password. It's very intuitive and easy to use for both you and your station supervisors.

Which of these hours do you want to approve and post all at once?

- ○ Just hours sent by volunteers.
- ⦿ Just hours sent by supervisors.
- ○ All of these hours.
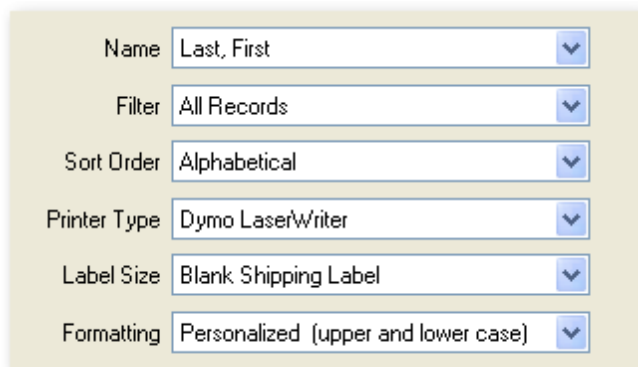
In the Web Assistant settings, when entering screen messages, the Reporter stops you when you reach the limit of what will fit (254 characters).

<u>**Donations**</u>
You can now track monetary and non-monetary donations made by either volunteers or stations. Enter the details about donations right from the Volunteer and Station screens on a new tab. We've included over a dozen new reports and spreadsheets to help you manage and track these donations. The Reporter now keeps track of lifetime donations and pledges for volunteers in the same way it keeps track of lifetime hours.

**Mailing Labels**
Like all other reports, mailing labels now can be previewed, printed or exported as Pdf, Word, or Excel files. They have the same look and feel as all other reports. We have also added many more label sizes for you to choose from. Volunteer labels can now be printed with the last name first. For those of you using a Dymo labelwriter, it's now easier to print a batch of labels on it.

| | |
|---|---|
| Name | Last, First |
| Filter | All Records |
| Sort Order | Alphabetical |
| Printer Type | Dymo LaserWriter |
| Label Size | Blank Shipping Label |
| Formatting | Personalized (upper and lower case) |

**Name Badge and File Folder Labels**
You can now print name badges and file folder labels for your volunteers, stations, and jobs. Name

badge labels can be used for luncheons and meetings while file folder labels fit perfectly on file cabinet folders.

### Automatic Live Updating

You can now have the Reporter automatically check for new live updates every few days. This means that whenever we fix a mistake or make an improvement, you'll receive it automatically. By default, the Reporter will check every 10 days for a new live update, but you can change this In Preferences

### Awards and Available Times

For volunteers, you can now keep track of awards they have received and times they are available. Every volunteer can have as many awards and available times as needed. We've set up some samples for you, but you can create your own just as with every other type of code.

### Touch-Screen Assistant

For those of you using the optional Touch-Screen Assistant, you can now administer it right from within the Reporter without having to open another program. It works the same as always, but is easier and more efficient for you to administer since it is inside the Reporter. You'll find it on the top menu under **Assistants** where it is grouped with the Web Assistant.

### Record Count

The Reporter now displays a count of the number of volunteers, stations, and jobs above the list of names.
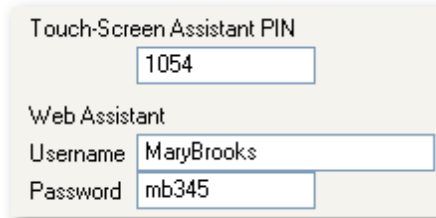
### Volunteer PINs and Passwords

You can edit a volunteer's Touch-Screen Assistant PIN and Web Assistant password on the info tab of the Volunteer screen. The same applies to Web Assistant passwords for station supervisors. You can

also still edit these from the Touch-Screen Assistant and Web Assistant screens.
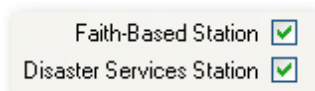


### Faith-Based and Disaster Services Stations
You can track which stations are faith-based and which offer disaster services. These are used on the Stations Profile report and counted on the Station Statistics report. They are also included on station spreadsheets.



### Station Roster Spreadsheet
We fixed a problem where phone numbers without an area code displayed incorrectly as negative numbers. You can now choose to include any of the three Memorandum of Understanding dates for each station. The spreadsheet now includes total counts for stations, unduplicated volunteers, and number of PFI stations. We also fixed a problem where the last row was not wrapping correctly.
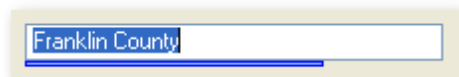
### Minor Changes
You can now filter on actual birth dates as well as birthday months and ages. This will enable you to prepare reports and spreadsheets for just people born in a particular decade or era.

When you click on Help | About the Volunteer Reporter, it shows you the location of your data, program, and shared documents. This can help us debug any problems you have accessing your data.

When you terminate a volunteer, station or job, the next record in the list is now highlighted instead of the first record.

The on-line help file has been changed to a format suitable for all versions of Windows including Vista.

When entering new reference codes you now see how much space you have left for the code with a blue progress bar across the bottom of the field.



We included the newest age groupings for RSVPs, SCPs, and FGPs on the Volunteer Statistics report.

We removed any extra, trailing dashes in zip codes.

You can now correctly use an ampersand (&) character in user-defined fields.

When you terminate the job, the number of filled placements is now set to 0.

When you change the format of telephone numbers in Preferences, the phone numbers for emergency contacts of volunteers are also changed.

## 18.9  New in Version 5.7

### Touch-Screen Assistant Messaging

If you use the optional Touch-Screen Assistant, you can now send messages to your volunteers whenever they sign in or out. You can send messages to individuals, filtered groups, or everyone. You can set messages that will be sent throughout the year whenever any type of volunteer's renewal date comes due. Birthday messages will also be sent automatically, if you choose.
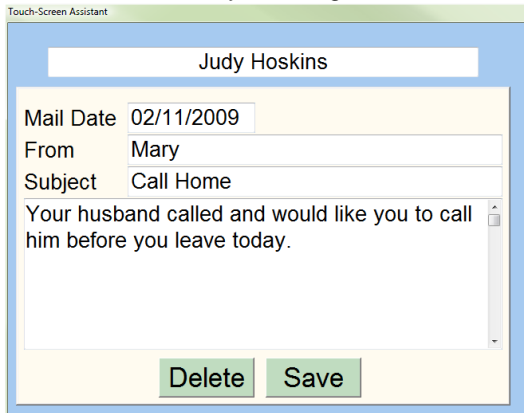


### Jobs as Clients

Sometimes volunteers serve with a particular person instead of at a job. We have modified Jobs in order to accommodate serving with individual clients. You can track a clients name, address, birthday, age, sex and several other items specific to Foster Grandparent and Senior Companion programs.

### Bigger Screens

You can drag screens longer as well as higher in order to see more information on one screen.
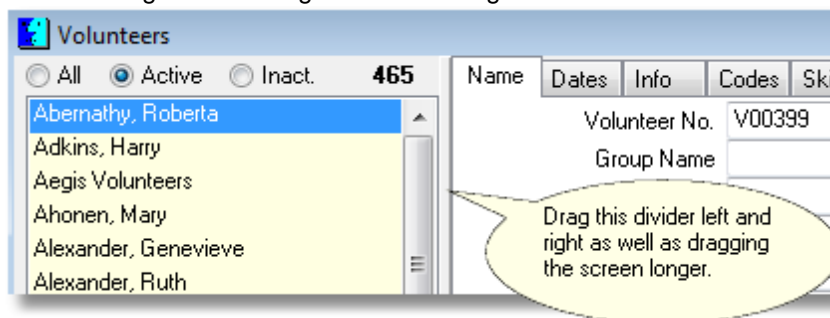


### Double-Click Jumping

You can quickly jump from one section of the Reporter to another by double-clicking. For example, from the Job/Client screen, double-click on the station field and you jump straight to that station's record.
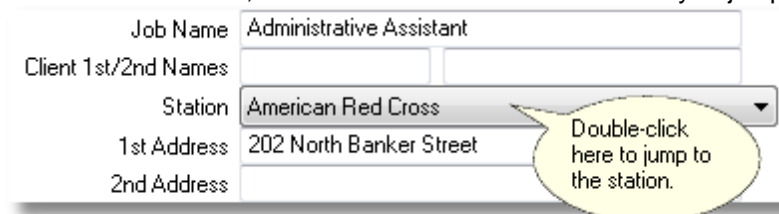
**Stipends for Volunteer**

You can choose to pay a stipend to some or all of your volunteers for their volunteer service. Stipends are calculated automatically when entering hours although you can change the amount. In order for a stipend to be calculated, the volunteer must be checked as being a stipended volunteer and the job must be checked as being a stipend job with a default stipend amount for each job. This enables you to restrict stipends to only some volunteers at some jobs. You can also set an overall default stipend in **Preferences**.

Stipend Job ☑
Stipend per hour $    2.65
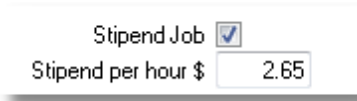
**More Powerful Filters**

For every filter limitation, you can now select whether the item is blank or not blank as well as a specific value or range of values. For example, you can create a filter of just volunteers who don't have a birth date.

Birth Date

◉ From  / /  Through  / /
○ Is blank
○ Is not blank

✓ Save    ✗ Cancel
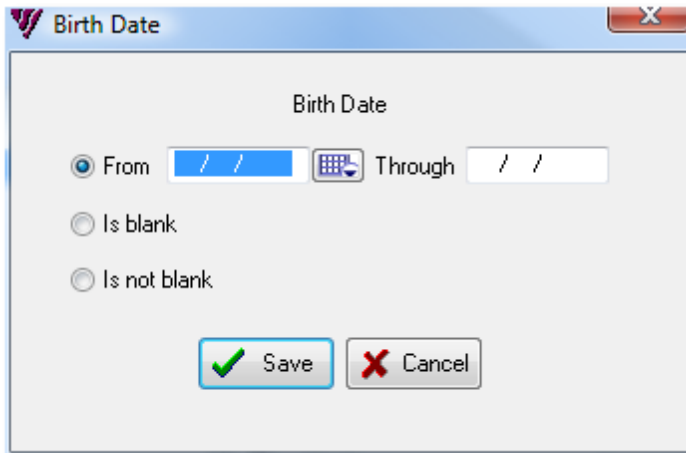
**New Reports**

Volunteers Without Any Placements During a Period of Time.

Three new reports for the Web Assistant. Hours and Reimbursements Waiting for Approval, by station, job, and volunteer.

Stations by Issue Area.

Client Counts by Special Need.

**More Flexible Backups**

When making backups, it remembers where the last backup went and it will add the date to the filename if you choose.

**Minor Changes**

Email and web address fields are tripled in length.

Trailing dashes at the end of zipcodes are removed.

Stations can be searched on a grid like volunteers.

All Hours Served reports allow for totals over 1 million hours.

When switching between the All, Active, and Inactive lists, it stays on the same record.

If the Reporter is already running when you try to start it, it switches to the open one instead of telling you that it's already open.

Schedules can be duplicated a year in advance.

You can filter by the date a volunteer was inactive or active.

On hours served reports you can choose to not include stipends, reimbursements, and in-kinds columns.

On hours spreadsheets, if you don't reimburse at all, no reimbursement columns will be shown. The same goes for impact counts and stipends.

On Hours Served, Detail spreadsheets, you now have the option of including subtotals.

Service Categories are now optional for jobs.

The Touch-Screen and Web Assistant screens can be opened along with other forms.

Typos fixed on Job Daily and Condensed Schedule and Timesheets.

Volunteer spreadsheets include Touch-Screen PINs and Web Assistant usernames and passwords.

The Touch-Screen Assistant will get live updates downloaded by the Reporter.

All reports with email and web address now correctly wrap email and web addresses instead of truncating them.

Fixed filters for station donations. They weren't working right.

## 18.10  New in Version 5.8

### Volunteer Photos

You can drag photos from your computer onto the volunteer's record, then print, rotate, crop, and export them.



### Check for Duplicates

When adding a volunteer, perform a duplicate check to prevent duplicates from being entered.



### Do-It-Yourself Spreadsheets

Create an unlimited number of custom, reusable spreadsheets that include just the columns you want.
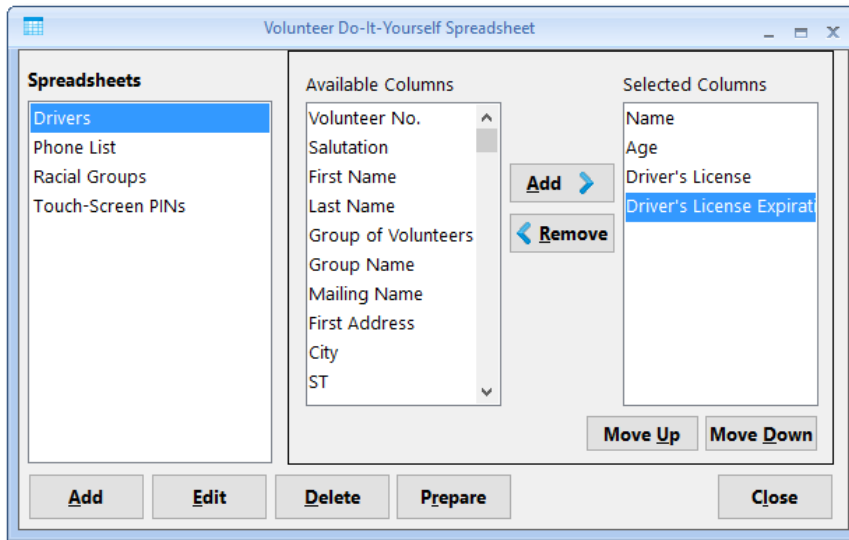
## Update the Value Wage
Update the value wage for all or most jobs at once. You can set the default value wage in Preferences.
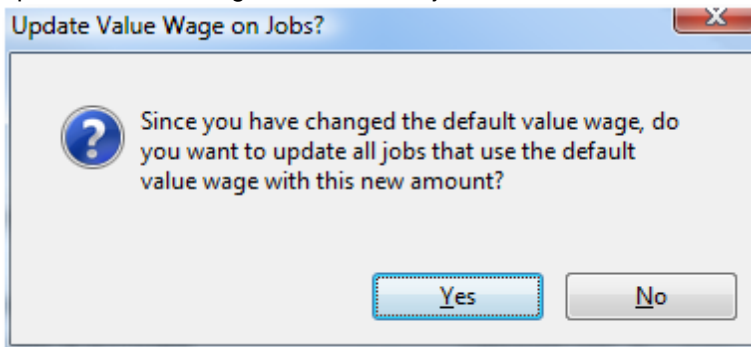


## Restart Jobs and Placements
When restarting a station you can choose to also restart jobs and placements for the station.
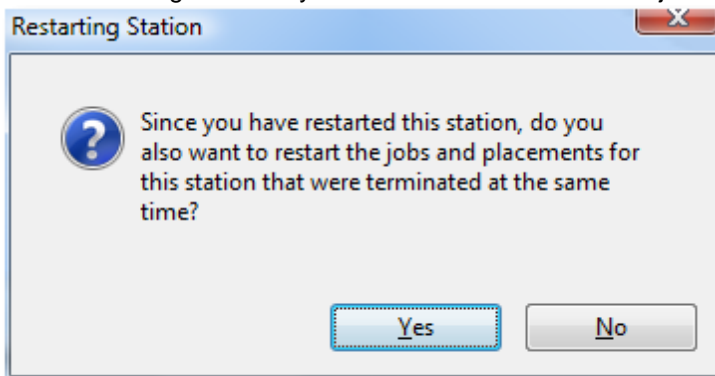


## Include "Current Resident" on Mailing Labels

Include "or current resident" as an option when printing labels.

☑ Include "or Current Resident" on label

Ms. Erma Barringer or Current Resident
729 North State Street
East Missoula, MT 59839

## Automatically Extend the MoU Renewal Data
When adding or editing the Memorandum of Understanding Last Renewal date, you have an option to set the next renewal date to 1, 2, or 3 years in advance.

| MoU Originally Signed | 02/15/2002 |
| MoU Last Renewed | 02/15/2007 |
| MoU Next Renewal | 02/15/2007 [+1] [+2] [+3] |

### Display Filter Limitations
On the filter screen click on the new "Display Filter" button to see all selected limitations for this filter.

**Filter Limits**

ⓘ Volunteer Limits
   Age: 55 - 999
   Sex: M

[ OK ]
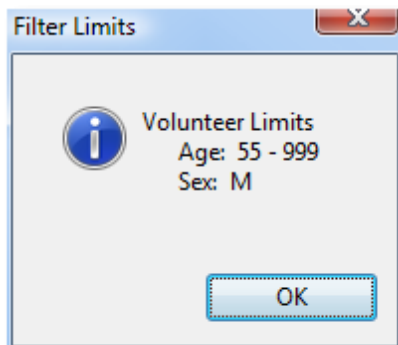
### New Report
**Hours Served, Detail by Station and Volunteer**. This report does not include jobs, just all volunteers who served time at a station during a period of time. At the same time, we renamed the report, **Hours Served, Detail by Station** to be **Hours Served, Detail by Station, Job, and Volunteer**.

### Minor Changes
You can delete schedules for just one volunteer at one job.

On the **Total Enrollment** report you have the option to only include those over 55.

Users with readonly access to datasets can no longer add, edit, or delete datasets, just select one.

Enable setting Web Assistant time out setting to 900 seconds.

On **Drivers License List**, you now have the option to include those with blank licenses.

We included a new filter limitation on whether a driver license is blank or not.

In the error log, we now include important folder locations and also removed some useless, confusing information in order to make it easier to get help when you have a problem.

Changed the **New Volunteers** report to allow it to include terminated volunteers.

Changed the **Volunteers Without any Placements During the Period** report to enable including volunteers who terminated during the period. This allows this report to match the **Total Enrollment** report.

A new station could sometimes show a volunteer. Also a new volunteer could show a job or some hours.

Sometimes volunteers would be shown on the Hours tab for a non-existent job.

Fixed filters to correctly filter on blank (and not blank) skills, groups, awards and available times.

The **Job Activity Status** report now includes jobs with 0 filled and no placements.

When adding a new data set while in a password protected data set, it was asking for your password after reindexing.

Names like DiVito were not alphabetized correctly on the Hours by Station screen.

The **Totally Inactive Volunteers** report was including volunteers who were terminated during that time, but are now non-terminated.
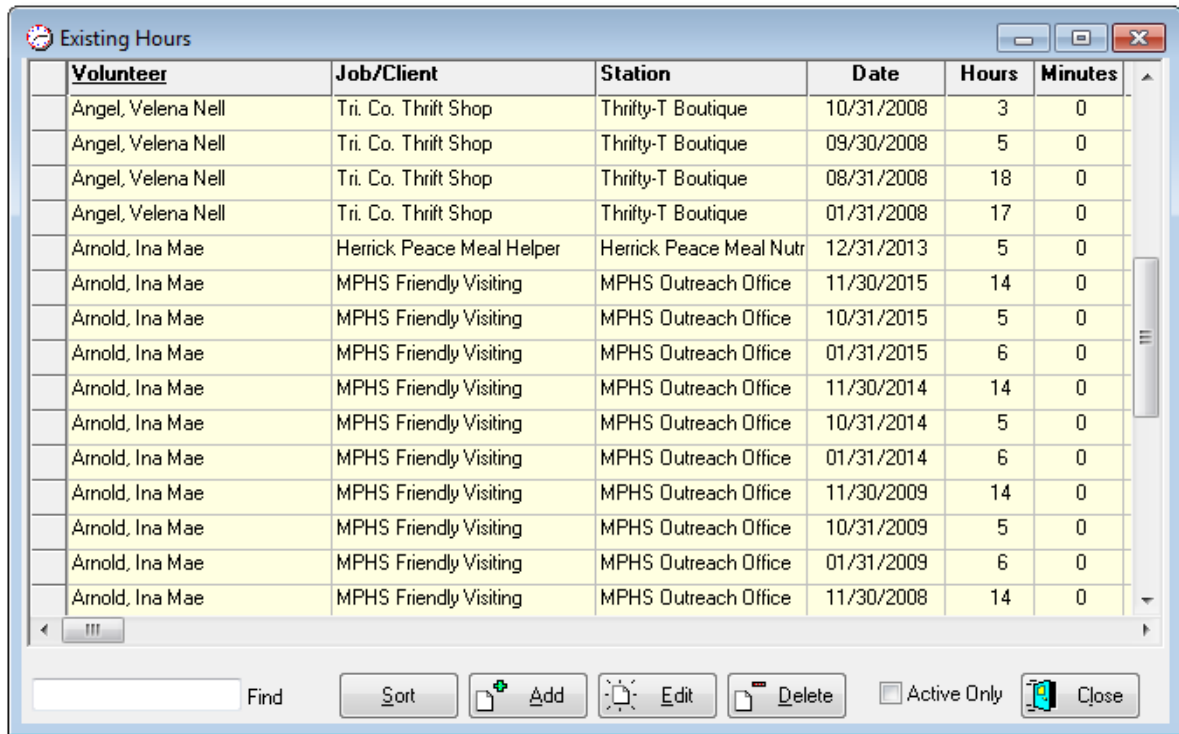
We changed the **Total Enrollment** report for volunteers who re-started by now, but were inactive during reporting period. They were counted as active.

On both the **Hours Served by Service Category** and **Service Category Group** reports we added a line for "unspecified" or jobs with blank service categories.

## 18.11 New in Version 5.9

**Hours Grid**

You can now enter hours into a large grid instead of the traditional lists. Both methods are efficient. Choose one or the other in Preferences.

| | Volunteer | Job/Client | Station | Date | Hours | Minutes | |
|---|---|---|---|---|---|---|---|
| | Angel, Velena Nell | Tri. Co. Thrift Shop | Thrifty-T Boutique | 10/31/2008 | 3 | 0 | |
| | Angel, Velena Nell | Tri. Co. Thrift Shop | Thrifty-T Boutique | 09/30/2008 | 5 | 0 | |
| | Angel, Velena Nell | Tri. Co. Thrift Shop | Thrifty-T Boutique | 08/31/2008 | 18 | 0 | |
| | Angel, Velena Nell | Tri. Co. Thrift Shop | Thrifty-T Boutique | 01/31/2008 | 17 | 0 | |
| | Arnold, Ina Mae | Herrick Peace Meal Helper | Herrick Peace Meal Nutr | 12/31/2013 | 5 | 0 | |
| | Arnold, Ina Mae | MPHS Friendly Visiting | MPHS Outreach Office | 11/30/2015 | 14 | 0 | |
| | Arnold, Ina Mae | MPHS Friendly Visiting | MPHS Outreach Office | 10/31/2015 | 5 | 0 | |
| | Arnold, Ina Mae | MPHS Friendly Visiting | MPHS Outreach Office | 01/31/2015 | 6 | 0 | |
| | Arnold, Ina Mae | MPHS Friendly Visiting | MPHS Outreach Office | 11/30/2014 | 14 | 0 | |
| | Arnold, Ina Mae | MPHS Friendly Visiting | MPHS Outreach Office | 10/31/2014 | 5 | 0 | |
| | Arnold, Ina Mae | MPHS Friendly Visiting | MPHS Outreach Office | 01/31/2014 | 6 | 0 | |
| | Arnold, Ina Mae | MPHS Friendly Visiting | MPHS Outreach Office | 11/30/2009 | 14 | 0 | |
| | Arnold, Ina Mae | MPHS Friendly Visiting | MPHS Outreach Office | 10/31/2009 | 5 | 0 | |
| | Arnold, Ina Mae | MPHS Friendly Visiting | MPHS Outreach Office | 01/31/2009 | 6 | 0 | |
| | Arnold, Ina Mae | MPHS Friendly Visiting | MPHS Outreach Office | 11/30/2008 | 14 | 0 | |

Find    Sort    Add    Edit    Delete    Active Only    Close

**Hours and Minutes**

In the new hours grid, you can enter hours and minutes instead of the traditional hours and tenths of hours.

**Upgrade Wizard**

The new upgrade wizard guides you through the process of upgrading your data to a new version.

**Touch-Screen Assistant History**

The Reporter now keeps a historical record of every time a volunteers signs in or out on the Touch-Screen Assistant.

### Dymo Label Printers
The Reporter has always been able to print labels on Dymo printers and now it continues that by enabling you to use the newest models.

### Smarter Filters
New, more powerful filters almost read your mind to give you exactly what you need on any report. The Reporter examines a filter and adjusts the result based upon all of your choices at once, even if you enter some conflicting limitations. It also includes some new limitations so you can request just those stations or jobs where hours were served during any period of time as well as whether a volunteer has a photo or not.

### Speed
The Reporter has been optimized to speed up intensive operations like upgrading and indexing.

### More Job/Client reports
Even more reports are available for jobs and clients that list addresses, phones, and emails.

### Backup Your Data
Making backups has been improved and streamlined.

### Live Updates
You now have the option to be informed whenever new, free updates are available without automatically downloading them. This will help a few of you that have firewalls that prevent automatic live updates. Make this choice in Preferences.

Automatically check for live updates once every 10 ⏶⏷ days.

Don't automatically download the updates, just tell me when they are available.

### Lifetime Hours
The Years of Service report now reports lifetime hours as of the date of the report even if the report is being run for a long ago period.

### Touch-Screen Assistant "Who's Here" Report
We have a new report to print who is currently signed in on the Touch-Screen Assistant. You print it right from the "Who's Here" tab on the Touch-Screen Assistant screen.

## Touch-Screen Assistant Who's Here List
Order: In Date and Time

| In Date | In Time | Volunteer | Job |
|---------|---------|-----------|-----|
| 2/17/2011 | 09:13a | Daniels, Abe | Book Assemb |
| 2/17/2011 | 09:15a | Barnwell, Lucille | Forest Park H |
| 2/17/2011 | 09:15a | Barringer, Marilyn | Sullivan Elem |
| 2/17/2011 | 09:15a | Baughn, Ruth L. | Tri. Co. Thrift |
| 2/17/2011 | 09:30a | Curtis, Cecil | MPHS Meals |
| 2/17/2011 | 10:18a | Davis, Angie | Sullivan Elem |
| 2/17/2011 | 10:19a | Angel, Ottis | Come Share |
| 2/17/2011 | 10:19a | Arnold, Ina Mae | Herrick Peace |

### Touch-Screen Assistant Time Out Interval
There is a new setting that enables lengthening the timeout interval. This can be useful if your volunteers have trouble selecting a job before the default 30 seconds is up.

Time Out Interval    33.00 ⏶⏷ Seconds to wait for a response.

### New Job Spreadsheets
Three new job spreadsheets including the popular Do-It-Yourself spreadsheet option.

### Birthday Lists
On the Volunteer Do-It-Yourself spreadsheet, you can now include three separate columns for birth date month, day, and year. This can be handy if you want to produce a list of birthdays in a coming month without listing the year or age of your volunteer.

Available Columns

Birth Date
Birth Date Month
Birth Date Day
Birth Date Year
Age

Add ->
<- Remove

Selected Columns

Name
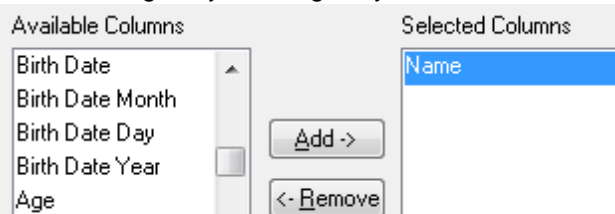
## 18.12 New in Version 6.0

### Volunteer Interface

All of a volunteer's data is displayed on one tab. The efficient display means you don't have to switch between tabs looking for the information you want to find.



**Placements and Hours**

You can now add and edit placements and hours right from the Volunteer screen.

**Additional Volunteer Fields**

We added 3 more phone fields, a specific field for keeping track of veterans, 10 new check marks, 5 more codes, 5 more text fields, 4 more date fields, 6 more number fields, and 10 more lists. You can also have up to 9 different addresses and 9 different contacts for each volunteer.

**Customize Fields**

We added a lot more volunteer fields, but instead of overcrowding the volunteer screen, you can now pick

and choose which fields you want to use. You can rename fields and rearrange them so that they are displayed in an order that makes sense to you.
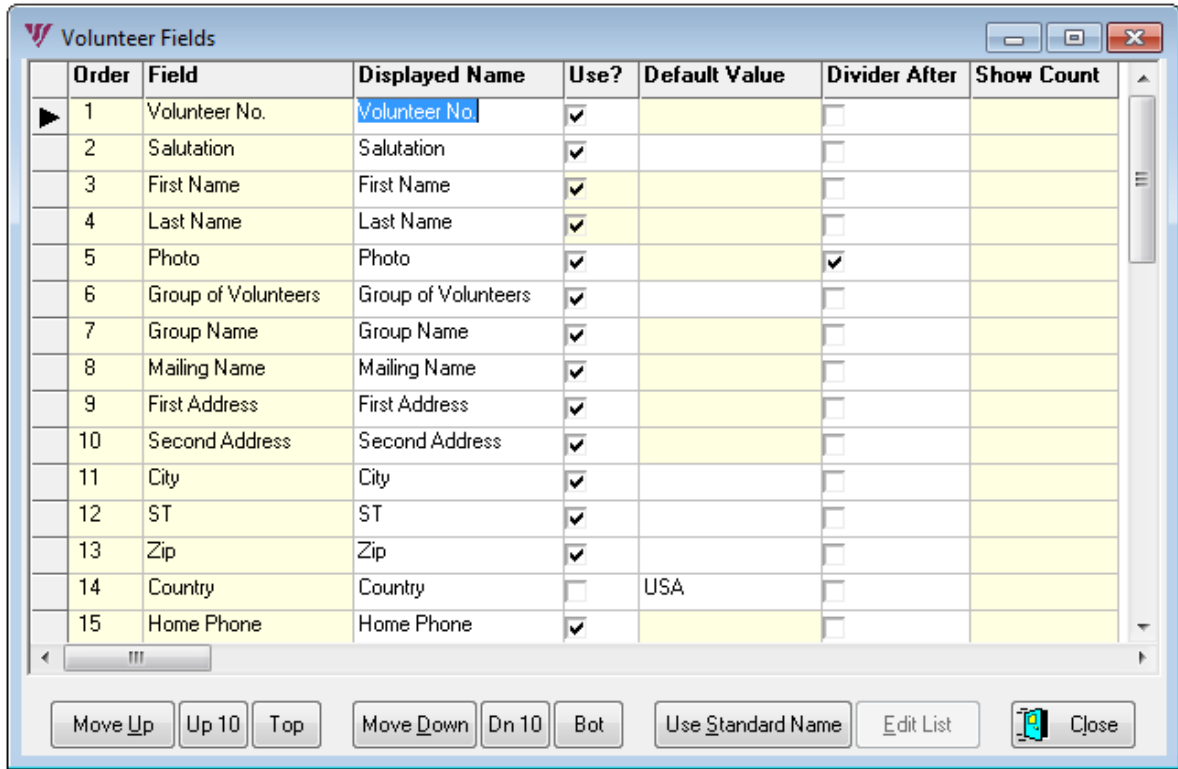


### Default Values
For most volunteer fields you can set a default value that will be entered automatically when adding new volunteers.

### Longer Fields
We lengthened several important fields including salutation to 10 characters and all codes and lists to 50 characters. No longer will you have to abbreviate counties, termination causes, or disabilities.

### Lists with Dates
For lists like awards, you can now keep track of when they received the award. This can be useful for things like trainings or vaccinations. We've given you 5 new lists with dates to use for any purpose.
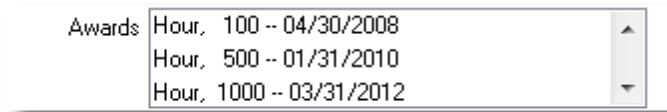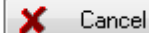


### Easier Termination and Restarting
We have made it easier to terminate and restart a volunteer or a placement. Each one can be done in just one step instead of several because there are separate buttons for both terminating and restarting volunteers and placements.

### Long Comments
We also made it easier to work with long comments by putting them on a separate tab, enabling you to jump to the top or bottom, and inserting today's date with a single click.



### Fiscal Year
In Preferences you can set the start to your fiscal or budget year. The Reporter will use that month when running reports to enable you to select that period of time. For example, if your budget year starts in April, the Reporter will enable you to set the reporting period to **Last April-March** and **This April-March** .



### Mailing Label Improvements
When printing station and job mailing labels, you can choose to have it addressed to either the first or second contact.



### Service Categories and Station Types Wizards
If you are an RSVP, FGP, or SCP, you can use these wizards to ensure that your codes are up to date and match the official lists from the CNCS.

File | Edit | Data Maintenance | Re

Backup
Restore

Reindex Data

Passwords
Preferences
Field Lists

Check Service Categories
Check Station Types

Select Data Set
Delete Old Data

Exit
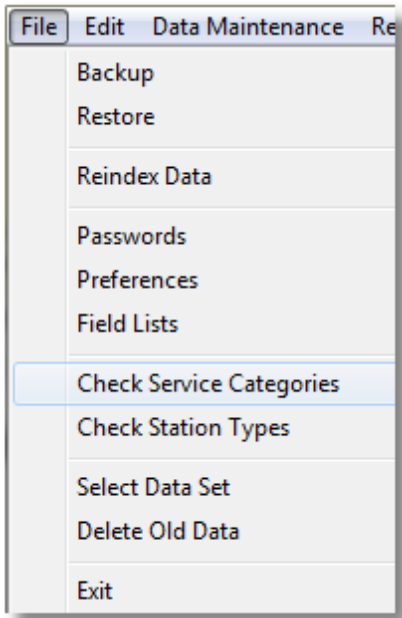
## 18.13 New in Version 6.1

**New Interface for Stations and Jobs**

Following changes to volunteers, all the profile information for stations and jobs is shown on one scrolling screen in order to make it easier and more efficient to use.



**Station Volunteers**

You can now see all of a station's volunteers on one screen.

**Hours Entry**
You can add new hours from either the station or job screens without having to jump over to the Hours screen.

**Easier Termination and Restarting**
We have made it easier to terminate and restart stations and jobs. Each one can be done in just one step instead of several because there are separate buttons for both terminating and restarting.



**Active Only Placements**
You can now choose to view just active placements by just clicking a box.



You can also print a list of active only placements right from the volunteer screen via the Print button.
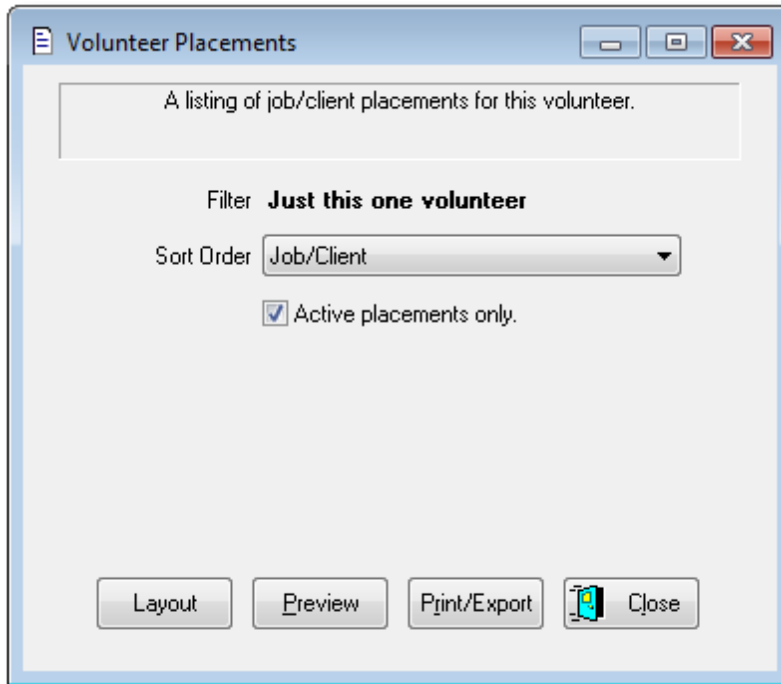
**More Fields for Stations and Jobs/Clients**
We have included 10 new check marks, 11 more codes, 7 more text, date and number fields. Each contact person has their own cell phone number and email address. As with volunteers, you can turn off fields you don't use, rename them, rearrange them, and set default values for them, all from Preferences.

**Faster List Navigation**
When editing a long list like skills, you can now type the first letter of the skill you want to jump to. Selected list items are indicated with an intuitive checkbox.
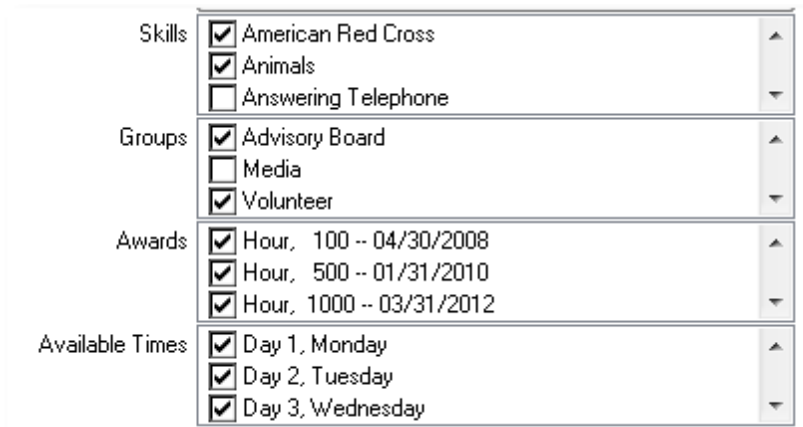


**Performance Measurements**
For our customers associated with the Corporation for National and Community Service (CNCS), we have included new features to assist in collecting, tracking, and reporting on performance.

In Preferences, we have now enable you to indicate whether you are a RSVP, FGP, or SCP.

For Jobs, we have included two new fields for jobs called **Objective** and **Service Activity**. The choices for Objective are based upon whether you have indicated that you are either a RSVP, FGP, or SCP. After you choose an objective, your choices for Service Activity are limited to just those applicable to your chosen objective. These codes are kept up to date by the Reporter. You can use the Copy/Paste buttons to quickly duplicate the objective and service activity from one job to another.

Also in Jobs is a new checkbox "Works with Veterans?".

**Primary Placements**
On the Station Roster Spreadsheet, the CNCS now requires that volunteers be counted only once, no matter how many different jobs they perform. To meet this requirement, each placement can now be marked as being "primary." The Reporter ensures that each volunteer has only one primary placement and makes it easy to set the primary placement from either the Placement, Volunteer, or Job screen either by clicking on the **Make Primary** button or by simply double clicking on the Primary checkbox.

On the Jobs screen, click on the **Make Primary** button and you have the option of making all placements at this job the primary placement at once.

Use the new Volunteer report, Primary Placements, to quickly find volunteers who don't yet have a primary placement assignment.

Several Statistical reports can now be run to include only primary placements. These reports include Station Statistics, Job Statistics, Service Activity Statistics, and Focus Area Statistics.

**New Reports**
We have included a number of new reports. Most of them deal with the new performance measurements.
- Service Activity Statistics
- Focus Area Statistics (to help determine your primary focus area)
- Hours Served, Summary by Service Activity
- Hours Served, Summary by Objective
- Volunteer Primary Placements
- Station Roster Spreadsheet (new version)

## 18.14 New in Version 6.2

**Hours Sorting**
On the hours grid, the newest are always shown at the top instead of the bottom.

| Date | Hours | Minutes | S |
|------|-------|---------|---|
| 09/15/2014 | 2 | 0 | |
| 06/28/2014 | 3 | 0 | |
| 06/14/2014 | 47 | 2 | |
| 06/13/2014 | 1 | 28 | |
| 01/31/2014 | 18 | 45 | |

**Bulk Replacements**
We created a new, easy to use wizard which enables you to update a single field for many (or all) records at once. For example, for every volunteer missing an entry for County you could enter "Franklin". The wizard guides you every step so that you can efficiently fill in gaps or errors that may have worked into your data over the years.
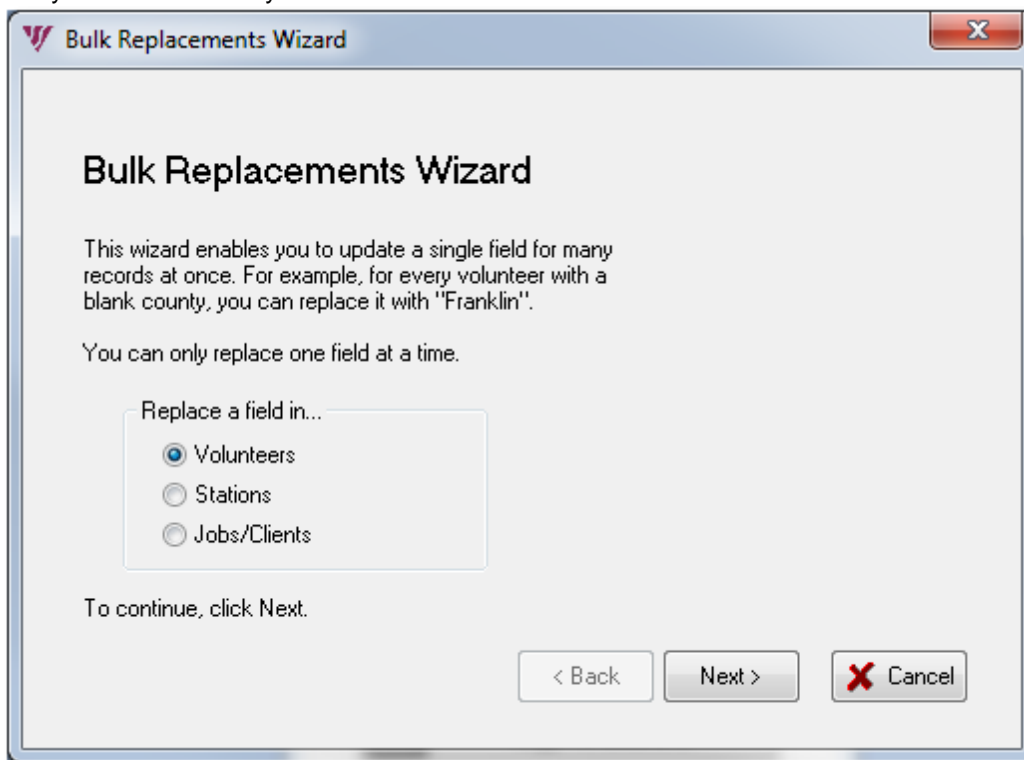


**Placement Counts and Details**
We added two new reports, but since each report can be run multiple ways, it's really like nine new reports. The new Placement Counts report shows the number of placements during a period of time and how many were actively served. The new Placement Details report shows when each placement started and ended along with the number of hours served during the period. Running in order by Job could be very useful to see which volunteers are the most (and least) active.

Placement Counts

Placement Details

Volunteers Without Placements As of a Single Date

Volunteers Without Placements During a Period of Time

Placements History

Primary Placements
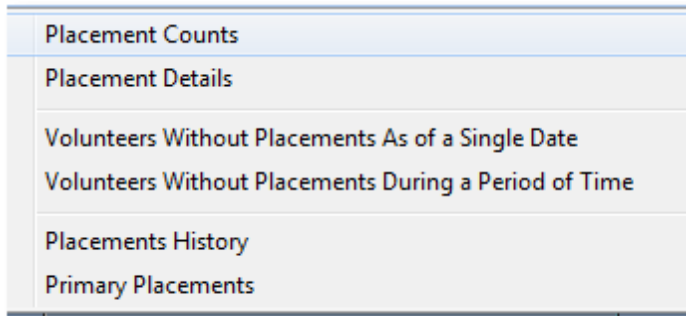
These two new reports replace the previous Inactive Volunteer reports. The new ones show more information and are more flexible in how they can be run. At the same time, we grouped these and some others similar reports into a new menu section of Placement Reports.

### Primary Placement Report
This report now has an option to include, "Only those who served hours."

### Active Only Placements
On the Placements screen, you can now choose to view just active placements by just clicking a box.

Delete | ☑ Active Only | Close
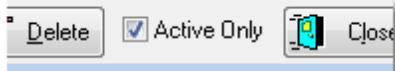
### More Lists for Jobs/Clients
We have included 5 new lists to be used for Jobs/Clients. These are similar to the skills list where you can check more than one skill for each job/client. For example, if you want to keep track of the special needs required by individual clients, you could set up one of these new fields to track items like bathroom, dressing, feeding, transportation. You could check as many as needed for every client. Of course, you can leave them turned off unless you need them.

Special Needs | ☑ Bathroom
              | ☑ Dressing
              | ☐ Feeding
Military Service | ☐ Air Force
                 | ☐ Army
                 | ☐ Coast Guard
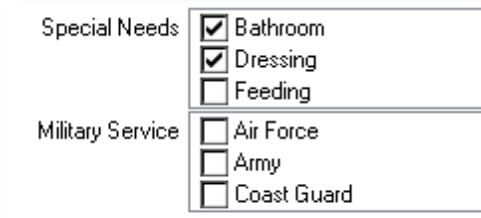
### New Service Activity Reports
We added two new statistics reports, Service Activity Counts and Service Activity Details. These reports can be very handy to help complete grant applications. They show the number of volunteers and hours served at each service activity splitting them out by whether it is an unduplicated volunteer at their primary placement or not.

Service Activity Statistics

Service Activity Counts

Service Activity Details
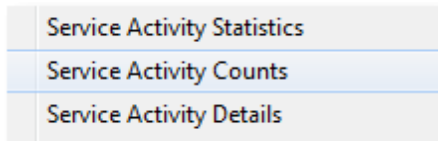
### Job/Client Do-It-Yourself Spreadsheet
You can now include the client's first and last names as separate fields.
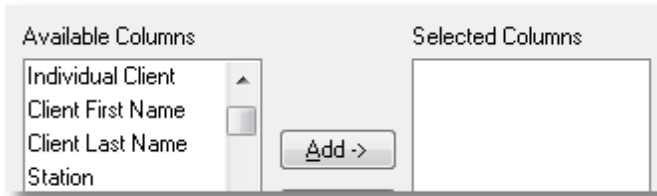
## Moving Hours

If you mistakenly enter hours for the wrong volunteer or job/client, you can now just move them to the correct one. On both the volunteer and job/client hours tab, there is a new button called "Move Hours". You can use it to move a single hours record to either a different volunteer (from the job/client screen) or to a different job/client (from the volunteer screen).



## Counting Volunteers and Hours by Number of Placements

The Volunteer Statistics report now includes a breakdown of the number of volunteers (and their hours) who served at no placements, just one placement, and two or more placements.

| Number of Placements | Volunteers | Percent | Hours | Percent |
|---|---|---|---|---|
| Volunteers with No Placements | 14 | 3% | 0.00 | 0% |
| Volunteers with Only One Placement | 131 | 28% | 10,169.00 | 21% |
| Volunteers with Two or More Placements | 322 | 69% | 38,113.11 | 79% |
| Total | 467 | | 48,282.11 | |

## Reporting Flexibility

The Profile reports for volunteers, stations, and job/clients now enables you to choose which fields to include. This is similar to the older, retired description reports.
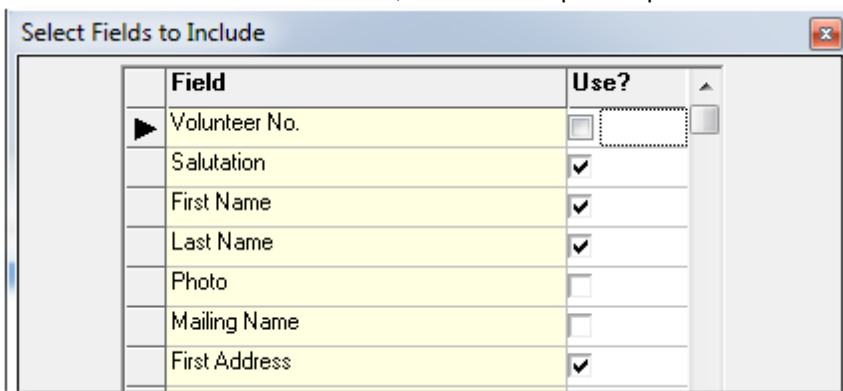


## Job Skills Report

We included a new report called "Job/Client Skills".

## Touch-Screen Assistant Bar Code Sign In

Your volunteers can now sign in by scanning their Name or ID Badge instead of with a PIN. The Touch-Screen Assistant will accept input from any kind of scanner such as bar code, magnetic strip, or RFID reader. On the Settings screen, you easily can set this up for any type of bar code or magnetic strip that you use.

**Touch-Screen Assistant Welcome Message**
You can specify a welcome message for use when signing in. If you've enabled them to scan their ID badge, you could set a welcome message of "Scan your ID badge to sign in.".
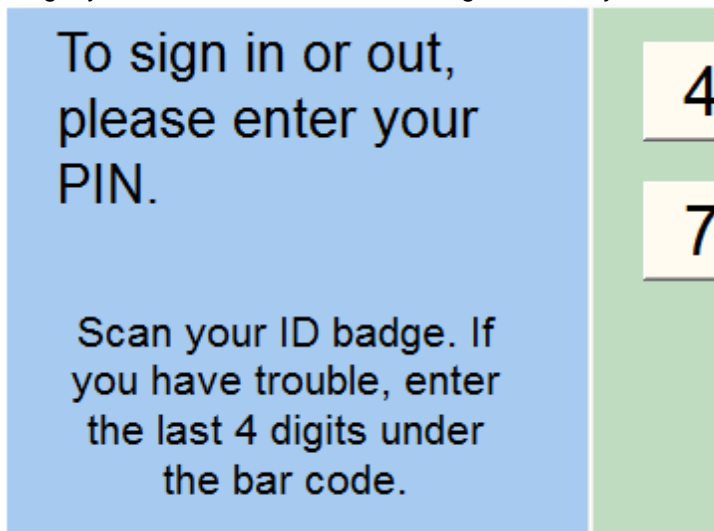


**Touch-Screen Assistant Mini Surveys**
As your volunteers sign in on the Touch-Screen Assistant, you can ask them questions and get

responses from them. You can ask a question of a single volunteer, a group, or from everyone. You define the limited responses that they can choose from and can then view and print a list of their responses.

| Mail Date | 09/18/2014 | **Response Required** |
|-----------|------------|------------------------|
| From | Susan | |
| Subject | Available for Advice? | |

Can you join us for a strategy session next Tuesday afternoon to brainstorm ideas for growing volunteers?

**Respond**    Delete    **Save**

**Touch-Screen Assistant Easier Scrolling**
When signing in on the touch-screen monitor, a volunteer with many jobs can now more easily scroll the list and select at which one he/she is serving today.

## Which Job?

**Masonic Home**
Sullivan Elementary School
Sullivan Health Care
Sullivan Living Center
Sullivan Pre-School
Tri County Senior Center Helper

Next Page

**Touch-Screen Assistant Automatic Sign Out**

For those volunteers who forget to sign out, you can now specify an automatic sign out at any time of day. For example, you might decide to sign them out automatically at 2am and assign them 2 hours.

Automatic Signout ☑ Use Auto Signout at 2 (24-hour clock) and assign 2 hour(s)
○ Accept these hours without approval.
◉ Require manual approval of these hours.

### Touch-Screen Assistant Group Counts

Now, when a group of volunteers arrives, the group can sign in on the touch-screen monitor as a group and specify how many of them are present today. You can see the group count in the Reporter and when the group signs out, the group's hours are multiplied by the number in the group.

## Group Sign In

How many are signing in today?

| 1 | 2 |
| 4 | 5 |
| 7 | 8 |

### Touch-Screen Assistant Impact Job Counts

When a volunteer signs out of an impact job, they now can enter counts for the optional two impact count fields. You can specify whether or not to enable this feature on the Touch-Screen Assistant Settings screen.

Impact Job Counts ☑ Enable volunteers to enter additional counts for impact jobs.

### Touch-Screen Assistant New Sign Out Color

You can set a different color for the sign out screen in order to try to help prevent mistakes.

### Touch-Screen Assistant Hours and Minutes

We now show lifetime hours to the volunteer as hours and minutes instead of hours and tenths of hours. We also show you hours and minutes on the Approve Hours tab.

## 18.15  New in Version 6.3

**Electronic Documents**
Now you can attach documents to volunteers, stations, and jobs in order to move towards a more paperless office. Drag documents onto the grid to add them or click the **Add Document** button. Double click on a document to open it. Right click to open a popup menu. You can attach any kind of document to a volunteer, station, or job including pdfs, images, photos, Word letters, and Excel spreadsheets. When making a backup of your data from within the Reporter, you can choose to include these documents in the backup, but if you do, it will make your backup file much larger.

| Profile | Placements | Hours | Donations | Comments | Documents |

| Descriptive Name | Actual File Name |
|---|---|
| Background Check Results | Anderson, Barbara.pdf |
| Group Photo Lunch 2014 | IMG_0008.JPG |
| Intake Form | Intake Form.pdf |
| Monthly Review | Monthly Review.docx |

Add Doc    Edit Name    Delete    Export    Open
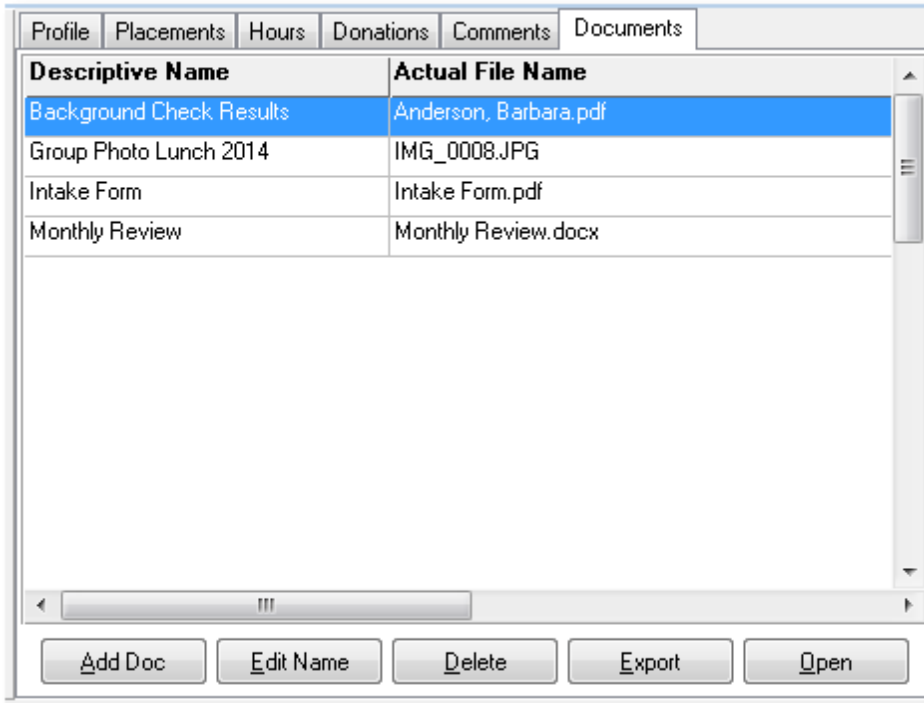
**Automatically Update Jobs**
When a station's address or contact information changes you can choose to automatically update all of the station's jobs with the same change. If the contact's phone changes, make the change for the station and then click on the **Update Jobs** button to pass that change on to all of the station's jobs.
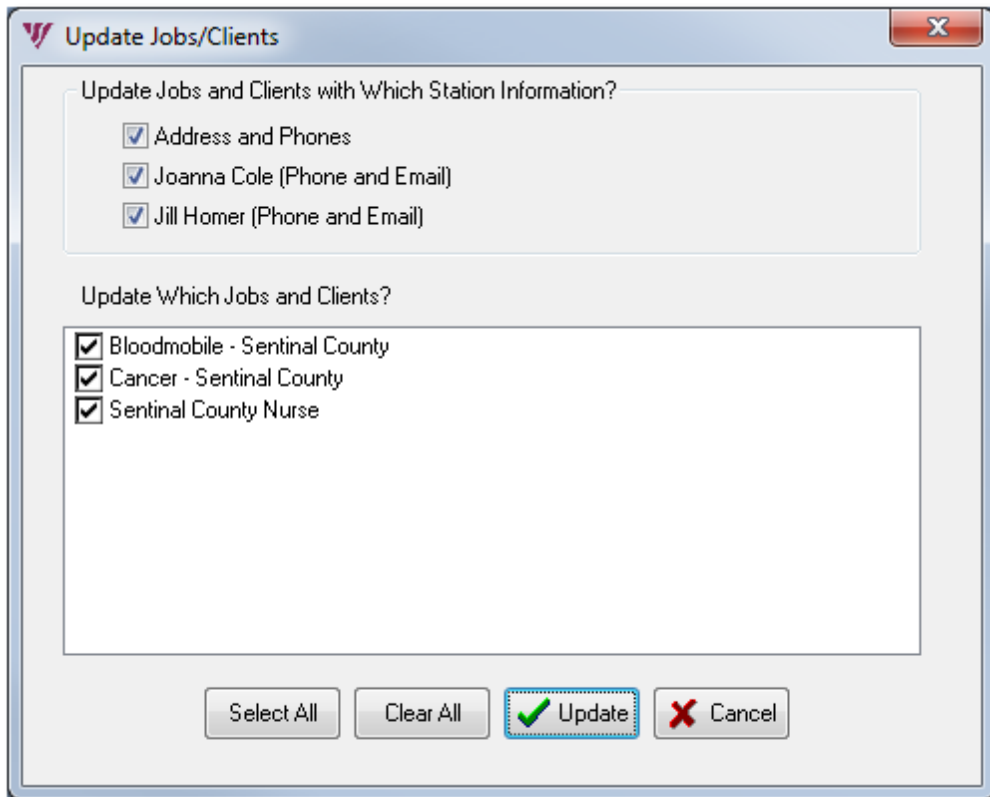
**Hours Active Only Checkbox**

On the Hours grid screen and the Hours tab of the Volunteer, Job, and Station screens, a new checkbox **Active Only** limits the display to only those hours served at placements that are currently active. For example, if a placement was terminated last month, any hours served at that placement will not be listed. They are still included on all reports, just not shown on the screen.
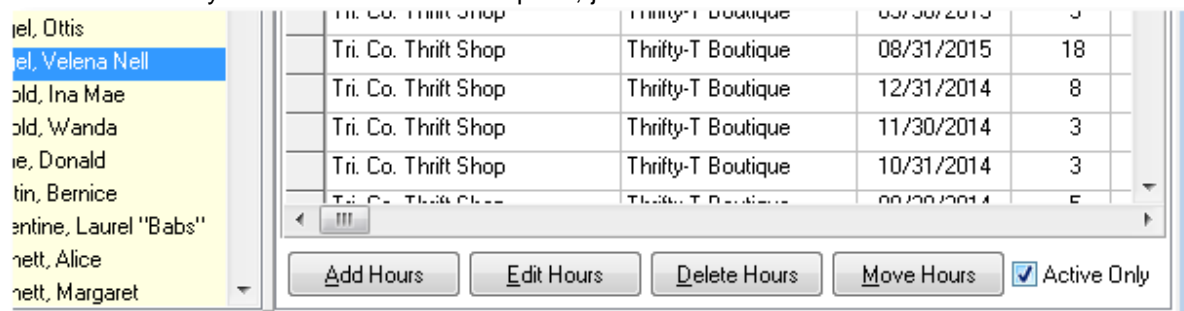


**Placements Pop-Up Menu**

On the Placements tab of the Volunteer and Job screens, a right click opens a shortcut menu to work with the current placement.
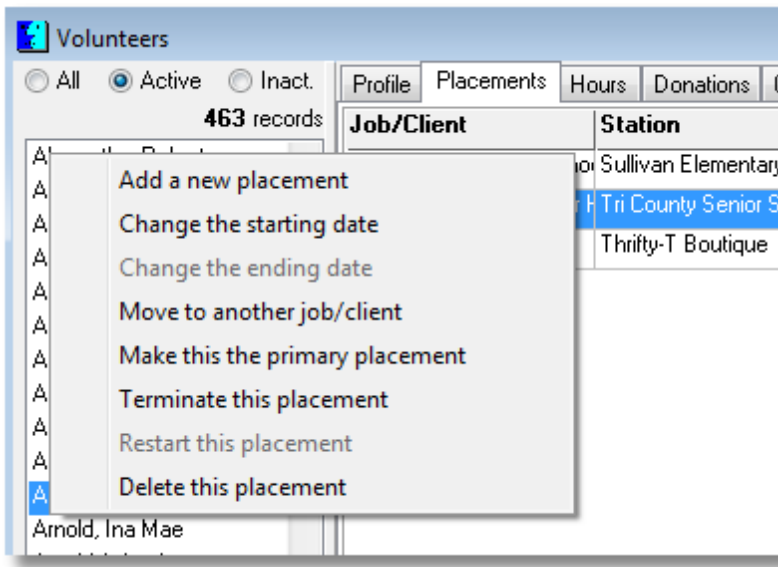
**Hours Pop-Up Menu**
On the Hours tab of the Volunteer, Job, and Station screens, a right click opens a shortcut menu to work with hours.
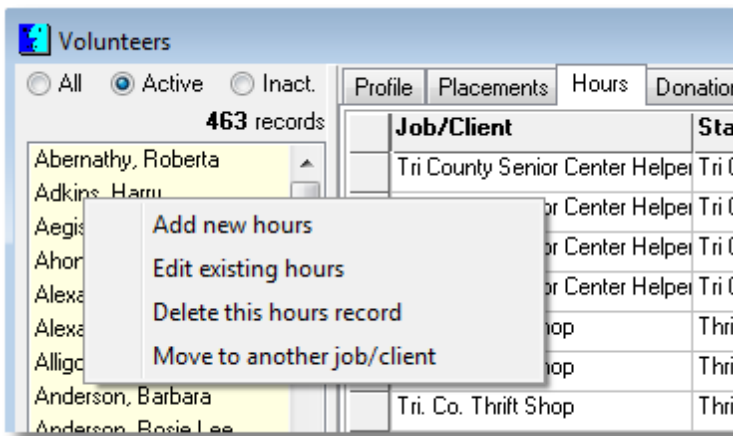


**New Hours Served report, Primary Placement vs. Non-Primary**
This new report splits out hours into two columns: hours served at a volunteer's primary placement and hours served at placements that are not primary. This report meshes well with the new report in 6.2, Service Activity Statistics. You can run that report to include just primary placements or not. This new report shows where the differences are when running the Service Activity Statistics with and without the primary placements checked. This example is in order by Service Activity, but it can also be run in order by Volunteer, Station, Station and Job, and Job and Station.

## Primary Placement vs. Non-Primary
December 2015, Order: Service Activity

| Objective | Service Activity | Volunteer | Hours at Primary Placement | Hours Not at Primary Placement |
|---|---|---|---|---|
| Education: K-12 Success | Tutoring - Public Schools | Ahonen, Mary | 0.00 | 6.00 |
| Education: K-12 Success | Tutoring - Public Schools | Bevis, Joan | 0.00 | 2.00 |
| Education: K-12 Success | Tutoring - Public Schools | Briggs, Marscha | 0.00 | 7.00 |
| Education: K-12 Success | Tutoring - Public Schools | Broadfoot, Pattie | 6.00 | 0.00 |
| Education: K-12 Success | Tutoring - Public Schools | Brown, Donna | 0.00 | 3.00 |
| Education: K-12 Success | Tutoring - Public Schools | Crowe, Melba | 0.00 | 1.00 |

**New Focus Area Objectives and Service Activities**
For RSVPs, the Reporter includes one new Focus Area Objective and twenty one new Service Activities from the Corporation for National and Community Service. For Senior Companion Programs, there is now one new Focus Area Objective and seven new Service Activities and for Foster Grandparent Programs there are three new Focus Area Objectives and fifteen new Service Activities.

**President's Volunteer Service Award Spreadsheet**
Changed the spreadsheet so that it writes "Adults" instead of "Adult". This was to meet a requirement from the Corporation for National and Community Service for federal projects using this spreadsheet.

**Primary Placements Report**
This report can now be run for just primary placements. In addition, it now only includes active, non-terminated volunteers.

**Job Counts**
Until now, job counts could only be kept for impact jobs. Now you can collect two additional counts when entering hours for any job, whether it is an impact job or not. The statistics report called **Impact Job Counts** has been renamed to **Job Counts**. It includes any job with additional counts whether or not they are impact jobs. This report is available now whether or not impact is turned on in preferences. Hours Spreadsheets will include columns for job counts no matter whether impact jobs are turned on. On hours grids, it doesn't matter whether impact jobs are turned on, just whether they are using job counts as to whether the count columns are showing. Timesheets no longer care whether impact jobs are on or off, just whether we are using count fields.

**Placement Changes**
The Placements screen has been reworked to closely match the capabilities on the placement tabs of the volunteer and job screens. You can now uncheck any placement as being the primary placement. It used to be that every volunteer had a primary placement, but now you can make it so that a volunteer has no primary placement. When adding placements, you can mark is as primary.

**Fully Compatible with Windows 10**
The Volunteer Reporter will correctly work on Windows Vista, 7, 8, or 10.

**Dymo Labels**

If you have a Dymo label printer and you are running the Reporter on Windows 10, you can only print to your Dymo printer if you have the most recent version of the  Dymo Label Software, version 8.5.3 or later. You can download this software for free from the Dymo website, www.dymo.com.

# 18.16 New in Version 6.4

**Large Fonts**

You can choose to increase the size of the screen fonts used throughout the Reporter. Change the font size on the new **View** menu.
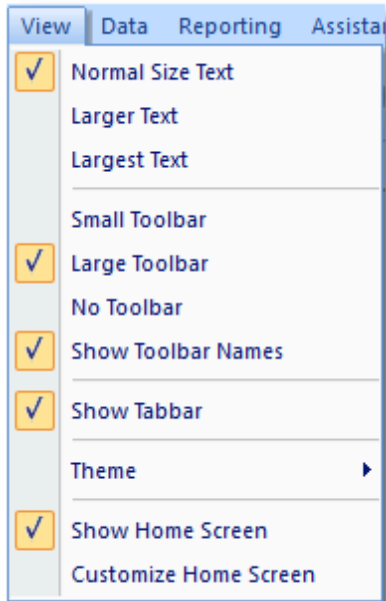


**View Menu**

In addition to changing the font size, you can set other options that affect the look of the Reporter including toolbars, tabbar, themes, and the home screen.

**Visual Themes**

Choose one of the preset themes to change the colors of the Reporter.
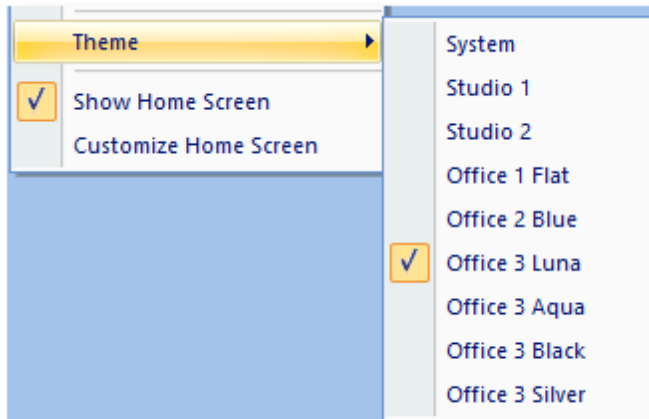
### Home Screen
Customize the home screen to include just the buttons you want to use and in the order you want.
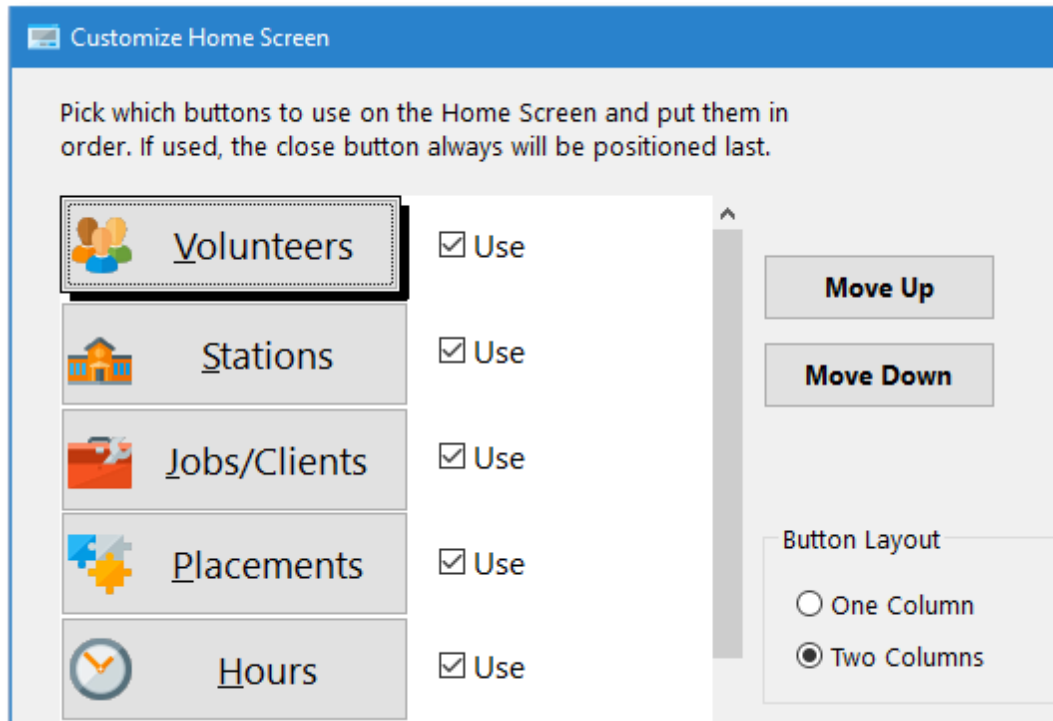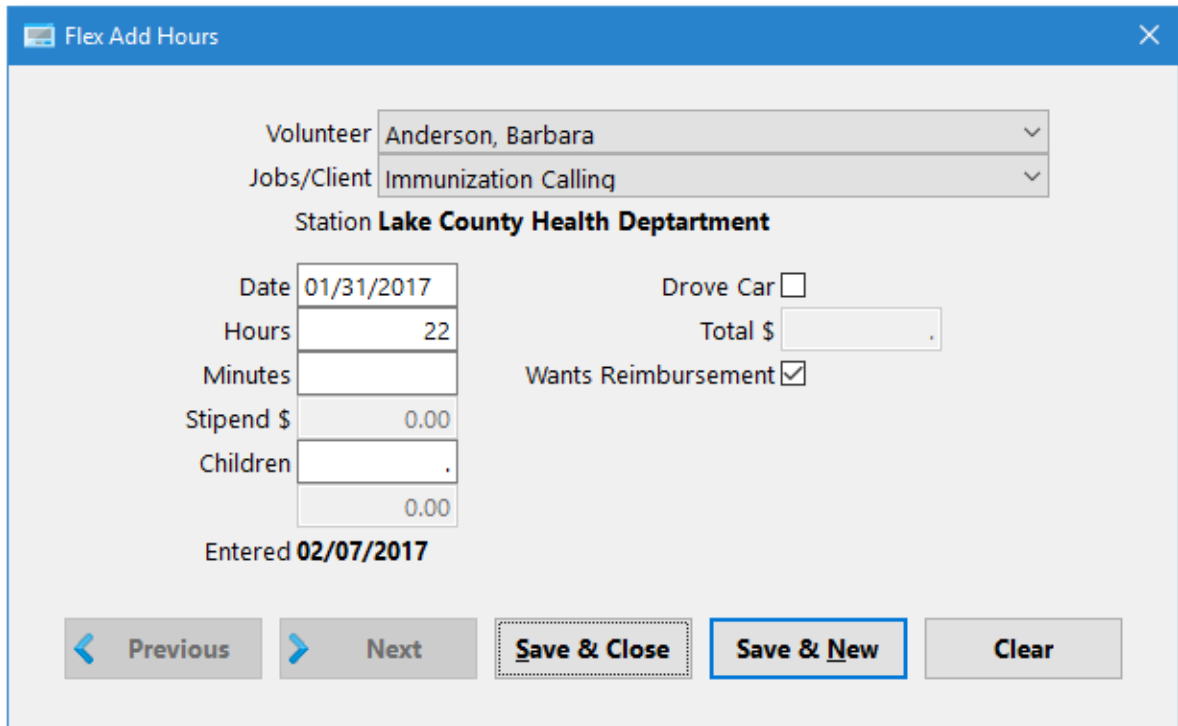


### Tabbar
The optional tabbar is positioned right below the toolbar. Each open window automatically gets a tab on the tabbar. This can be handy when you have several windows open at once because you can click on a tab to switch to a different window.

**Flex Add Hours**

We added a new option when adding hours called Flex Add. It enables you to add new hours for any volunteer serving at any job. Other options for adding hours can be more efficient for large sets of hours, but Flex Add is great for a single hours record that didn't get entered with the rest.

## Reports and Spreadsheets

All of the reports and spreadsheets are now listed in a separate window which enables a lot more flexibility and ease of use. You can scroll through the list one by one and read a short description of the report. You can also mark your favorites to find them easily later. Double clicking on a report will open it.
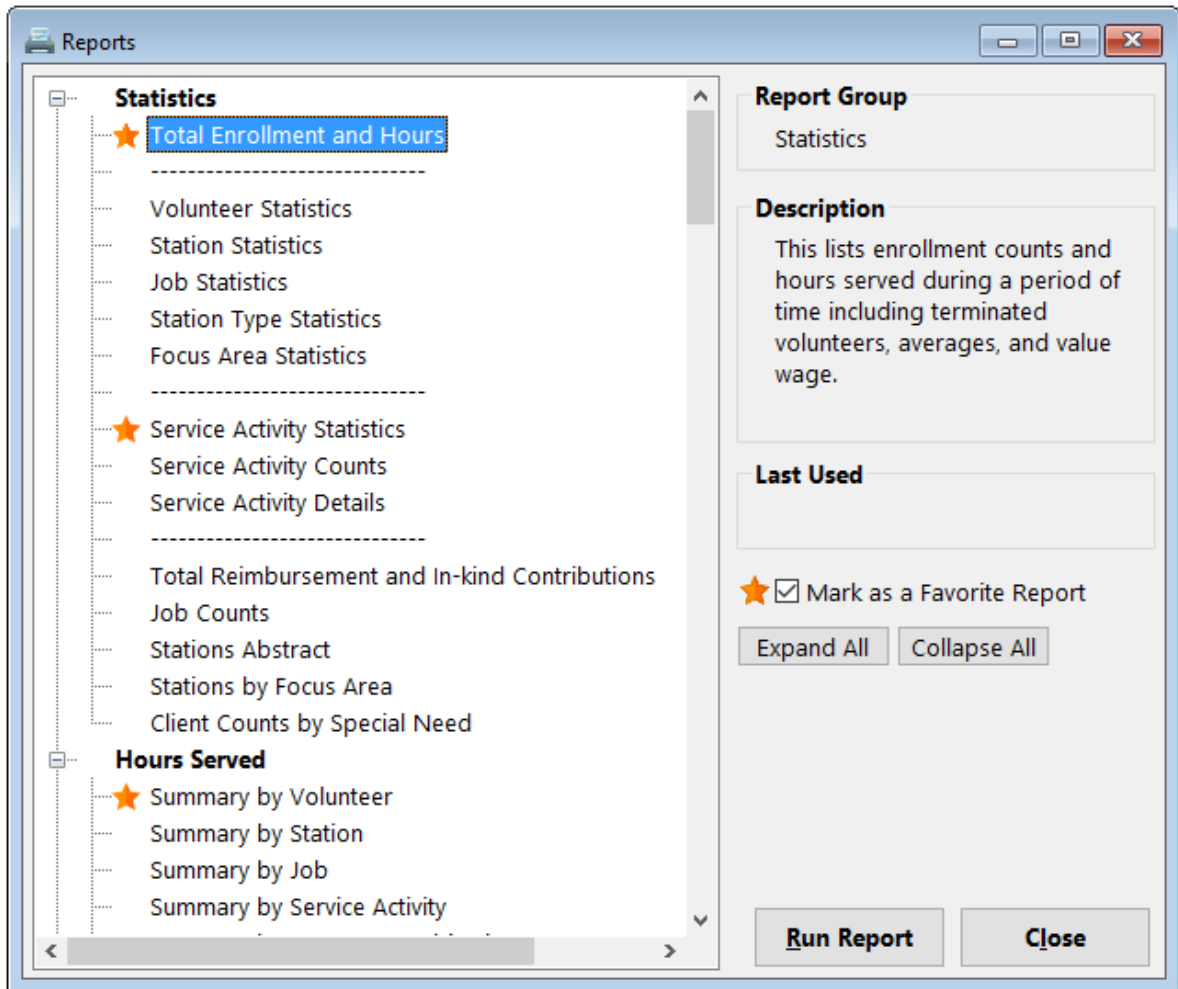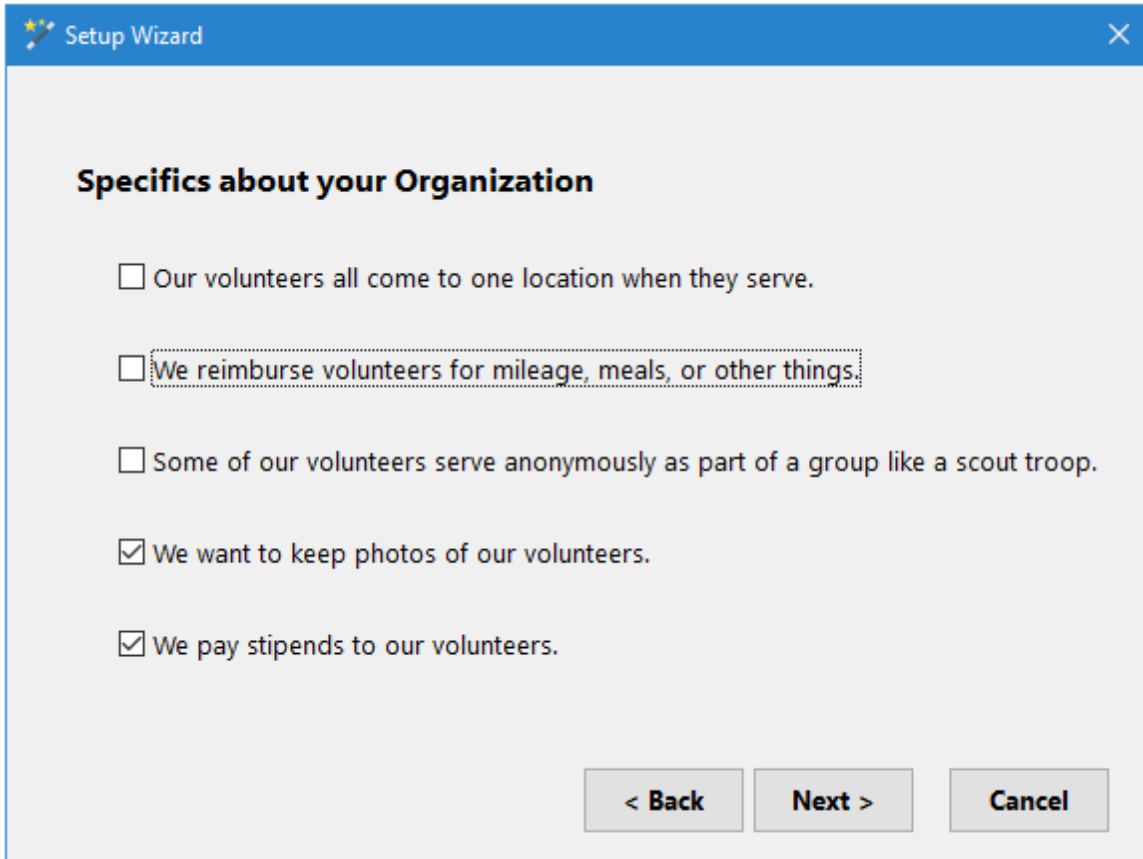
**Icons and Section Names**

On the Preferences screen, you can now change the name of any section of the Reporter as well as choose the icon used to represent the section. For example, if you never work with clients, you can change the name for the Jobs/Clients section to be just "Jobs".
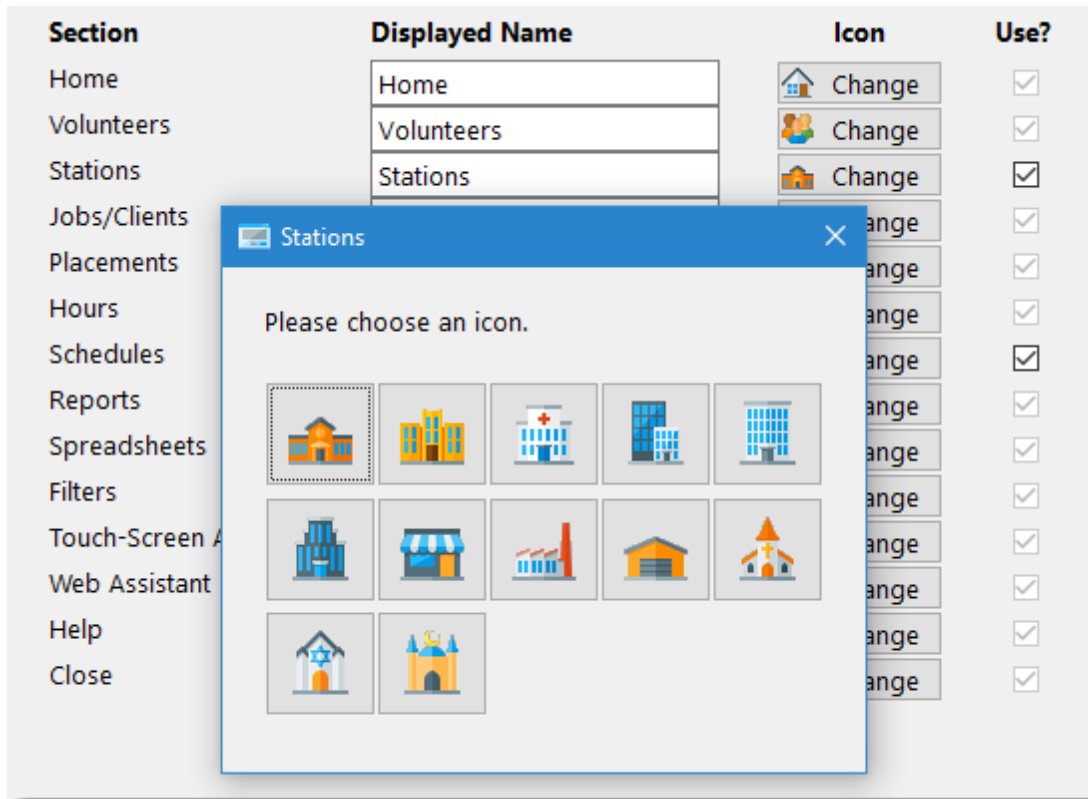
**Setup Wizard**
New users to the Reporter can run a short wizard to help them customize the Reporter to exactly suit their needs. This new wizard is located on the Preferences screen.

**Emailing**

Also located on the Preferences screen is a new tab with options for emailing from the Reporter. These options enable easier and more capable emailing to your volunteers whether you use Outlook, Gmail, Yahoo, or any other email program. You also have the option to use our new, built-in email program which is quite capable and easy to use.

**Emailing Options**

When sending email, use which option?

○ Outlook
   If you normally use Outlook, this is a good option.

○ Your Default Email Program
   This usually works well and offers all capabilities, but you will have to manually paste in data sometimes.

◉ Our Email Program
   Easy to use, but less capable and needs the following information.

|  |  |
|---|---|
| From Email Address | jsmith@volunteercenter.com |
| Outgoing Mail Server (SMTP) | mail.volunteercenter.com |
| Outgoing Server Port (SMTP) | 587 |
| User Name | jsmith@volunteercenter |
| Password | ************ ☐ Show  **Test** |

**Email Documents**

You can email documents easily to your volunteers or jobs. On either the volunteer or job screen, select the Documents tab, and click on the Export button to start an email message with the document already attached.

**Schedules**

We have completely reworked schedules to make them more useful and powerful. A calendar view of schedules is located on a separate tab on both the Volunteer and Jobs/Clients screens. Using schedules is very intuitive. Click on any single day to get more detail about the day as well as add schedules on that day. Duplicate schedules on either a daily or weekly basis. Print schedules, email them, and even export them to Google calendar.



**New Report: Web Assistant Applicants**

On the Applicants tab of the Web Assistant, you now have the option to print a one page report containing all of the applicants information.

**New Report: Lifetime Hours Differences**

This report compares lifetime hours to the sum total of all hours on file. Differences are the result of running the file utility to "Delete Old Data" and by editing lifetime hours.

**Modified Report: Volunteer Statistics**

The Volunteer Statistics report has an additional break of annual hours with different levels as required by FGPs and SCPs.

**Modified Spreadsheet: Volunteers, Stations, and Jobs**

On the Volunteers, Stations, and Jobs spreadsheet, we have added an additional column indicating whether the placement is primary or not.

## 18.17 New in Version 6.5

**Updated Report Viewer**
When previewing reports you have more options and flexibility. You can print the entire report or only certain pages right from the preview as well as export to pdf or Excel. Zoom in, zoom out out, or view full page width. A lot of easy options for viewing reports.
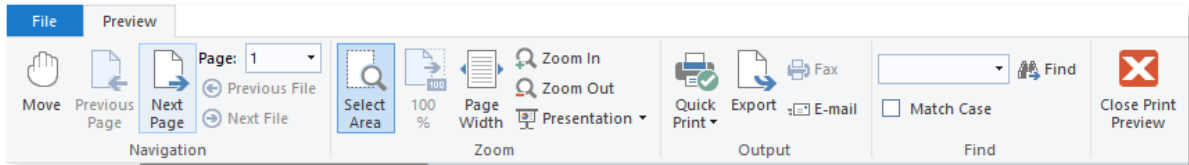
**Changed Report Behavior for Volunteers without Placements**
In the past, if a volunteer did not have any placements, they would be listed on reports when the option "Include volunteers with zero hours" was checked. Although an argument could be made either way, we have now chosen to exclude any volunteer who does not have any placements. A volunteer has to have a placement if they are to be included among volunteers with zero hours. We think this will make more sense for most people. You still have several placement reports to list volunteers without placements.

☐ Include volunteers with 0 hours

**New Report: Last Date Served**
This new volunteer reports lists all volunteers and the date they last served hours at any of their placements. You can choose to list them either alphabetically or by date. If you choose to list them by date with the oldest first, any volunteers who have never served hours will be at the top of the report.

**Last Date Served**
Order: Alphabetical

Page 1
03/20/20
10:12:30 AM

| Volunteer | Last Served | Job/Client | Station |
|---|---|---|---|
| Abernathy, Roberta | 08/02/19 | American Red Cross | American Red Cross |
| Adkins, Harry | 08/31/17 | Friendly Visiting | Forest Pavilion |
| Aegis Volunteers | 11/30/15 | MPHS Rural Transportation | MPHS Outreach Office |
| Ahonen, Mary | 12/31/15 | Sullivan Elementary School | Sullivan Elementary School |
| Alexander, Genevieve | 10/31/15 | MPHS Friendly Visiting | MPHS Outreach Office |
| Alexander, Ruth | 12/31/15 | Pencil Pal - Lincoln Elem | Lincoln Elementary School |
| Alligood, Ida Mae | 07/31/16 | Atkins, Mary | Come Share |
| Anderson, Barbara | 12/31/15 | MPHS Companion Outreach | MPHS Outreach Office |
| Anderson, Rosie Lee | 12/31/15 | MPHS Telecheck worker | MPHS Outreach Office |

**Modified Spreadsheets**
On two spreadsheets we have added an additional column indicating whether the placement is primary or not. This new column is on the spreadsheet called "Stations, Jobs, Volunteers" and on the spreadsheet "Jobs, Volunteers". It is already on the the "Volunteers, Stations, and Jobs" spreadsheet.

| HG | HH | HI | HJ | HK |
|---|---|---|---|---|
| istant Password | Added | Revised | Placement Starting Date | Primary Placement? |
| | 10/30/2007 | 01/22/2018 | 07/14/2015 | FALSE |
| | 11/12/2008 | 02/23/2017 | 02/28/2008 | FALSE |
| | 12/20/2006 | 04/26/2012 | 06/10/2013 | TRUE |
| | 09/08/2007 | | 05/01/2008 | FALSE |
| | 02/11/2008 | 02/01/2014 | 09/17/2011 | TRUE |
| | 03/12/2007 | | 10/01/2008 | TRUE |
| | 12/12/2006 | | 11/30/2007 | TRUE |
| | 12/18/2006 | | 11/06/2007 | FALSE |
| | 12/18/2006 | | 08/01/2008 | FALSE |
| | 12/18/2006 | | 10/01/2008 | TRUE |

### Modified Reports: Added More Phones and Emails

Since a volunteer can have up to five phones and jobs can have two contacts each with their own phone and email, we modified several reports to include them all. These modified reports are Volunteer Match, Job Match, and Job Phone and Email List.

### Modified Reports: Cell Phones Added

On the Stations and Volunteers report as well as the Station, Jobs, and Volunteers report, we made sure to include a volunteer's cell phone.

### New Reports: Client Ratio Summary and Detail

These two new statistical reports count the number of clients served by your volunteers on a weekly basis. This can be helpful for Senior Companion Programs when reporting to CNCS. The accuracy of these reports is dependent upon you entering hours on a daily or weekly basis. If instead, you only enter the number of hours served in a month, the Reporter cannot break it down by week.

### New Report: Focus Area Objective Statistics

This new reports lists the volunteers, jobs, and hours served for every focus area objective.

### Bulk Replacements Modification

You can now choose to not only change any field for all volunteers, stations, and jobs, but to blank or empty any field. This now includes the volunteer's Touch-Screen Assistant PIN.



**Bulk Replacements Wizard**

**Enter a New Value for a Single Field**

| Field | New Value | Erase It |
|---|---|---|
| Marital Status | | ☐ |
| TB Test | | ☐ |
| Renewal Date | | ☐ |
| Touch-Screen Assistant PIN | | ☑ |
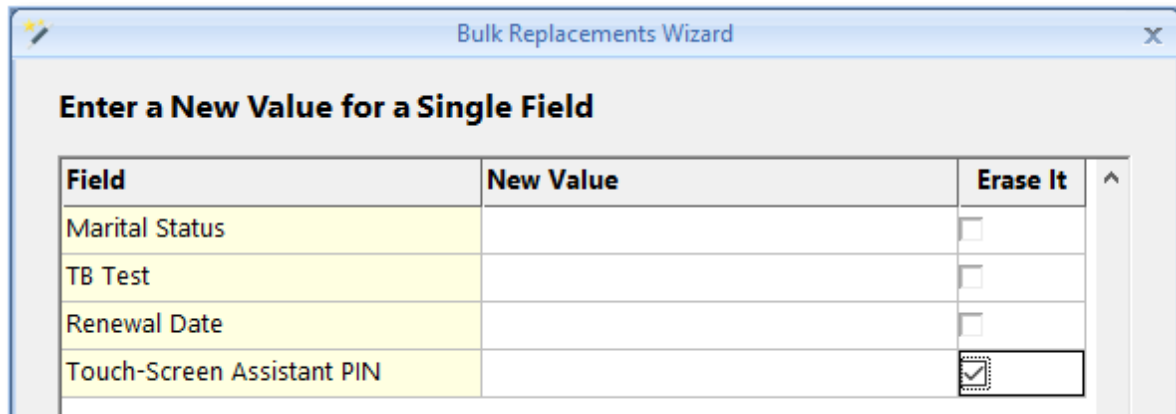
**Change the Date of a Bunch of Hours**

When editing hours that are all on one date, you can now choose to change the work date for all of them at once. This is handy if you mistakenly use the wrong date when adding a batch of hours.
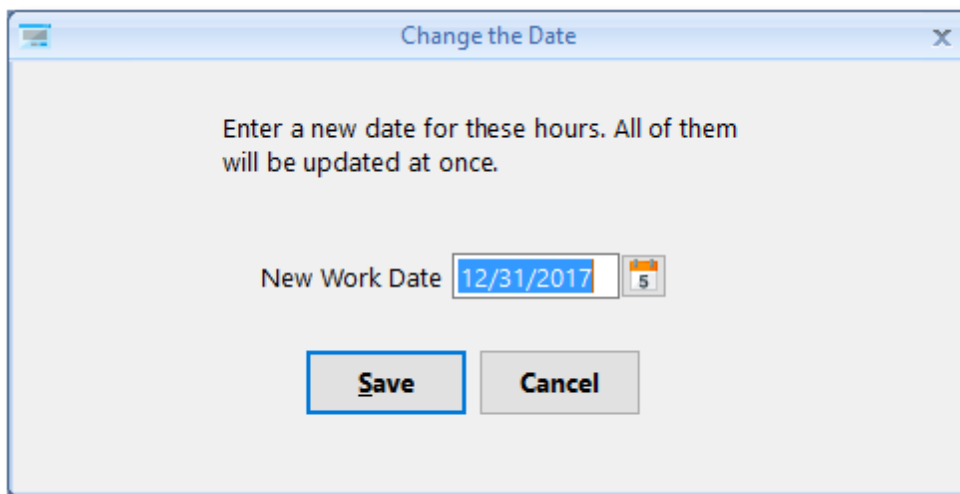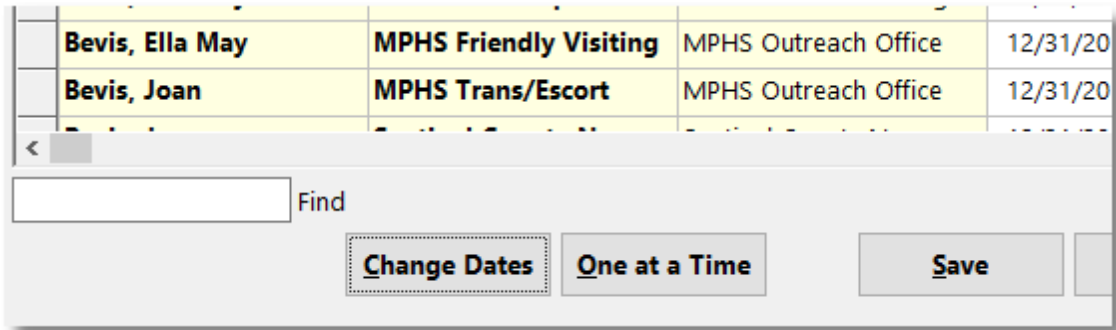
## 18.18 New in Version 6.6

### Roaming Users
A rather obscure feature of Windows enables users to sit at different computers, log in, and still access their own desktop, apps, and settings. The Reporter can now be used in a roaming Windows environment.

### Contacts on Spreadsheets
On the Volunteer Do-It-Yourself Spreadsheet you can now include a column containing the volunteer's contacts like Emergency, Doctor, or Beneficiary. All of a volunteer's contacts will be listed in a single column of the spreadsheet.

| | A | B |
|---|---|---|
| 1 | **Name** | **Contact** |
| 2 | Abernathy, Roberta | Emergency, son, John Abernathy, 406-878-8879, jabernathy@gmail.com<br>Friend, Jane Harris, cell: 405-684-5484, jharris@gmail.com |

### Newest Starting Date
Also on the Volunteer Do-It-Yourself Spreadsheet you can now include a column for the Newest Starting Date. For volunteers who have started and stopped one or more times, this will show the most recent date they started volunteering again.

| | A | B | C |
|---|---|---|---|
| 1 | **Name** | **Starting Date** | **Newest Restart Date** |
| 2 | Abbott, Jane | 05/01/2013 | 02/01/2019 |
| 3 | Aston, Mary | 07/01/2013 | 07/01/2013 |
| 4 | Barker, John | 01/01/2016 | 06/01/2018 |
| 5 | Colister, Abby | 10/01/2013 | 10/01/2018 |
| 6 | Collins, Barbara | 01/01/2013 | 08/01/2018 |

### Starting and Stopping Dates on Profile Report
The Volunteer Profile report now includes all starting and dates of the volunteer.

| Starting Date | 04/01/2013 |
|---|---|
| Terminated | |
| Termination Cause | |
| Years and Months of Service | 3 years, 7 months (as of 04/17/2019) |
| Start/Stop Dates | 04/01/2013 – 10/31/2013<br>06/01/2014 – 09/30/2014<br>03/01/2015 – 10/31/2015<br>04/01/2016 – 10/15/2016<br>04/30/2017 – 09/30/2017<br>04/01/2018 – |
| Birth Date and Age | 04/06/1953, 66 (as of 04/17/2019) |
| Sex | F |

### Profile Report Fields
When selecting which fields to include on any of the three Profile reports (Volunteer, Station, or Job), we've made it a little easier by including buttons to Select All Fields and to Clear All Fields.

**Improved Excel Exporting**

When you any report to Excel, the formatting of numeric columns is improved in order to enable easier summing of the columns.



**Monthy Hours Spreadsheets**

We added three new spreadsheets, each of which shows the hours per month over any period of time. You can actually include ten years of data with each month listed in a separate column (120 columns). You can also list just a few months although it defaults to twelve. The three variations of this spreadsheet are by Volunteer, Station, and Job.

| ▦ | Monthly Hours by Volunteer Spreadsheet | _ □ X |

For [ 12 ▲▼ ] Months

Starting [ July ▾ ]  [ 2015 ▲▼ ]

Filter [ All Records ▾ ]

Order **Alphabetical**

☐ Include Volunteers with 0 Hours

☐ Include Volunteer Details

**Prepare**   **Close**

| | A | B | C | D | E | F | G |
|---|---|---|---|---|---|---|---|
| 1 | **Vol No** | **Name** | **Jul 2015** | **Aug 2015** | **Sep 2015** | **Oct 2015** | **Nov 2015** |
| 2 | V-0399 | Abernathy, Roberta | 2.50 | 0.00 | 0.00 | 0.00 | 5.00 |
| 3 | V00002 | Adkins, Harry | 0.00 | 0.00 | 0.00 | 11.00 | 0.00 |
| 4 | V00320 | Aegis Volunteers | 4.00 | 6.00 | 7.00 | 4.00 | 4.00 |
| 5 | V00092 | Ahonen, Mary | 0.00 | 6.00 | 3.00 | 25.00 | 30.00 |
| 6 | V00450 | Alexander, Genevieve | 0.00 | 0.00 | 0.00 | 5.00 | 0.00 |
| 7 | V00003 | Alexander, Ruth | 0.00 | 0.00 | 1.00 | 11.00 | 1.00 |
| 8 | V90031 | Alligood, Ida Mae | 0.00 | 0.00 | 0.00 | 0.00 | 4.00 |
| 9 | V00004 | Anderson, Barbara | 16.00 | 15.00 | 20.00 | 22.00 | 11.00 |

**Filter Name**
You can create longer names for filters, up to fifty characters.

**New Filter Report**
From the Filter screen, you can now prepare a report of all filters including all of their limitations. This will be very handy when troubleshooting a filter giving unexpected results.

| Filter | Limit Name | Value |
|---|---|---|
| **A 3 Vols** | | |
| | Volunteer Limits | |
| | Selected Volunteers is | Barringer, Erma |
| | or | Curtis, Evelyn |
| | or | May, Wayne |
| | or | Smith, Amy |
| **Bad Filter Test** | | |
| | Volunteer Limits | |
| | ST | NY |
| | and Zip | 58901 - 58901 |
| **Blank Drivers License** | | |
| | Volunteer Limits | |
| | Driver's License | Is blank |
| **Donations - General** | | |
| | Donation Limits | |
| | Earmarked for is | General Fund |

**Bug Fixes**

Edited the Total Enrollment report to correctly refer to the "Totally Inactive by Volunteer" report on line 20.

Fixed a bug where donation sources with names longer than 21 characters didn't count correctly on Donation Statistics report. Also Awards, Availability, Termination Causes, Group Memberships, and all other Donation Codes.

Fixed rounding errors throughout Reporter. It could sometimes be off by a penny when calculating stipends and reimbursements.

Fixed an odd bug where if you had Schedules turned off, the buttons to edit Job impact statements were missing.

# 18.19 New in Version 6.7

**Rewording of Annual Hours**

On the Volunteer Statistics report is a section of Annual Hours Served grouped by the number of hours per week. We changed the wording of the categories to make more sense. The original wording came from the Corporation for National and Community Service, but it was unclear where some of the groups started and ended. We have not changed the calculations behind the numbers, but decided that it is better to use unambiguous wording instead.

**Previous Groupings**

| Annual Hours Served |
| --- |
| Under 260 Hours (4 or fewer hrs/wk) |
| 260-520 Hours (5 - 10 hrs/wk) |
| 520-1040 Hours (11 - 19 hrs/wk) |
| 1040-1560 Hours (20 - 29 hrs/wk) |
| Over 1560 Hours (30 or more hrs/wk) |
| Total |

**New Groupings**

| Annual Hours Served |
| --- |
| Under 260 Hours (0 - 5 hrs/wk) |
| 260-520 Hours (5 - 10 hrs/wk) |
| 520-1040 Hours (10 - 20 hrs/wk) |
| 1040-1560 Hours (20 - 30 hrs/wk) |
| Over 1560 Hours (30 or more hrs/wk) |
| Total |

**Easier Copying to the Clipboard**

A single **right click** on almost any field will copy the field contents to the Windows Clipboard making it available for pasting into any other application. For example, you could **right click** on a volunteer's emergency contact and then paste it into a letter or envelope in Word. Alternatively, you can use the Windows shortcut key of Ctrl-C to copy data from any field. You used to have to edit the record before using Ctrl-C, but not anymore.
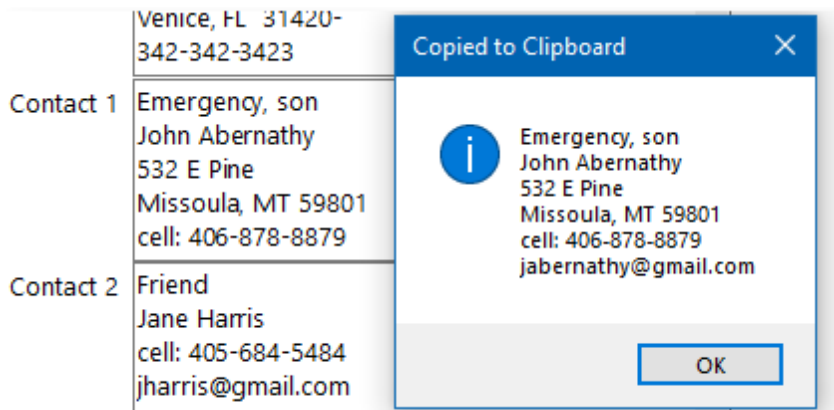
**New Report of Average Hours per Week by Volunteer**

We created a new report of Average Hours per Week by Volunteer. This will give you a lot of detail about how those annual hours served are calculated on the Volunteer Statistics report.

**Average Hours per Week, by Volunteer**
January 2020, Order: Average Hours per Week

02/25/20
10:16:07 AM

| Name | | Hours | Weeks | Average Hours/Week |
|------|------|------|------|------|
| Bevis, Ella May | | 37.00 | 4 | 9.25 |
| Patterson, Eleanor | | 37.00 | 4 | 9.25 |
| Smith, Amy | | 37.00 | 4 | 9.25 |
| Jenkins, Kate | | 38.00 | 4 | 9.50 |
| Olive, Carolyn | | 38.00 | 4 | 9.50 |
| Rice, Norma | | 38.00 | 4 | 9.50 |
| Cole, David | | 39.00 | 4 | 9.75 |
| Davis, Janet | | 39.00 | 4 | 9.75 |
| 5 - 10 Hours per Week | Vol Count: 59 | 1,591.00 | 4 | 397.75 |
| Elliott, Joan | | 43.00 | 4 | 10.75 |
| Whitehead, Doris | | 43.00 | 4 | 10.75 |

**Additional Genders**

We added a new, optional gender field to both Volunteers and Job/Clients. This gender field enables more than just M/F. For example, you could select **Another Gender**, **Prefer Not To Say**, or **Unknown**. You can still use the same sex field with just M/F, if you prefer. In Preferences, you can decide whether to use the existing **Sex** field or the new **Gender** as well as change the list of available genders.

**Job/Client Contacts**

We have copied **contacts** from Volunteers and added them into to Jobs/Clients. These can be used for emergency contacts, a client's care giver, a client's doctor, or any other person associated with either a job or client. You can include up to nine contacts per job/client. You can turn contacts on or off and specify the number of contacts per job/client in Preferences. These contacts can be included on the Job/Client Do-It-Yourself Spreadsheet and the Job Profile Report.



**Comments as a Separate Access Level**

When setting a user's access levels, you can now set access to Volunteer Comments, Station Comments, and Job/Client Comments. These access levels are separate from the access assigned for Volunteers, Stations. and Jobs/Clients. For example, you can set the access level for Volunteers to be **Full**, but the level for Volunteer Comments to be **Read-Only** or **None**. If a user's access level is **None** for comments, the user will not be able to either read the comments on the screen nor print the comments on any report.

**Add Schedules for All Volunteers at a Job/Client**

When adding a new schedule to a job/client, you can now choose to add the same schedule for all volunteers currently placed at the job/client. This could be useful, for example, if you were scheduling all volunteers to a group meeting. This will create a separate, duplicate schedule for each volunteer, all at the same time.

**Modified Report**

On the Last Date Served Report, we now include the job/client and station where the volunteer last served hours.

**Last Date Served on Spreadsheets**

On the Volunteer Do-It-Yourself Spreadsheet you can now include a column containing the last date the volunteer served hours.



**Bug Fixes**

Fixed Totally Inactive by Volunteer report to correctly format email addresses when exported to Excel.

Adjusted the Volunteer Statistics report to correctly categorize annual hours when the report is run for time periods other than one year.

## 18.20  New in Version 6.8

**More Photos for Volunteers**

Each volunteer can have up to six photos and each can be captioned separately. Still only one will be shown on the volunteer's profile tab, but you can choose which photo will be shown by default. You could keep additional photos for future publicity purposes or as reminders of spouses, children or donors. On the profile tab along with the other photos buttons for adding and manipulating photos is a new button to open a window of more photos.



You can have up to six photos for each volunteer, each with its own caption. Designate one to be shown on the volunteer's profile tab by checking it as the default photo.
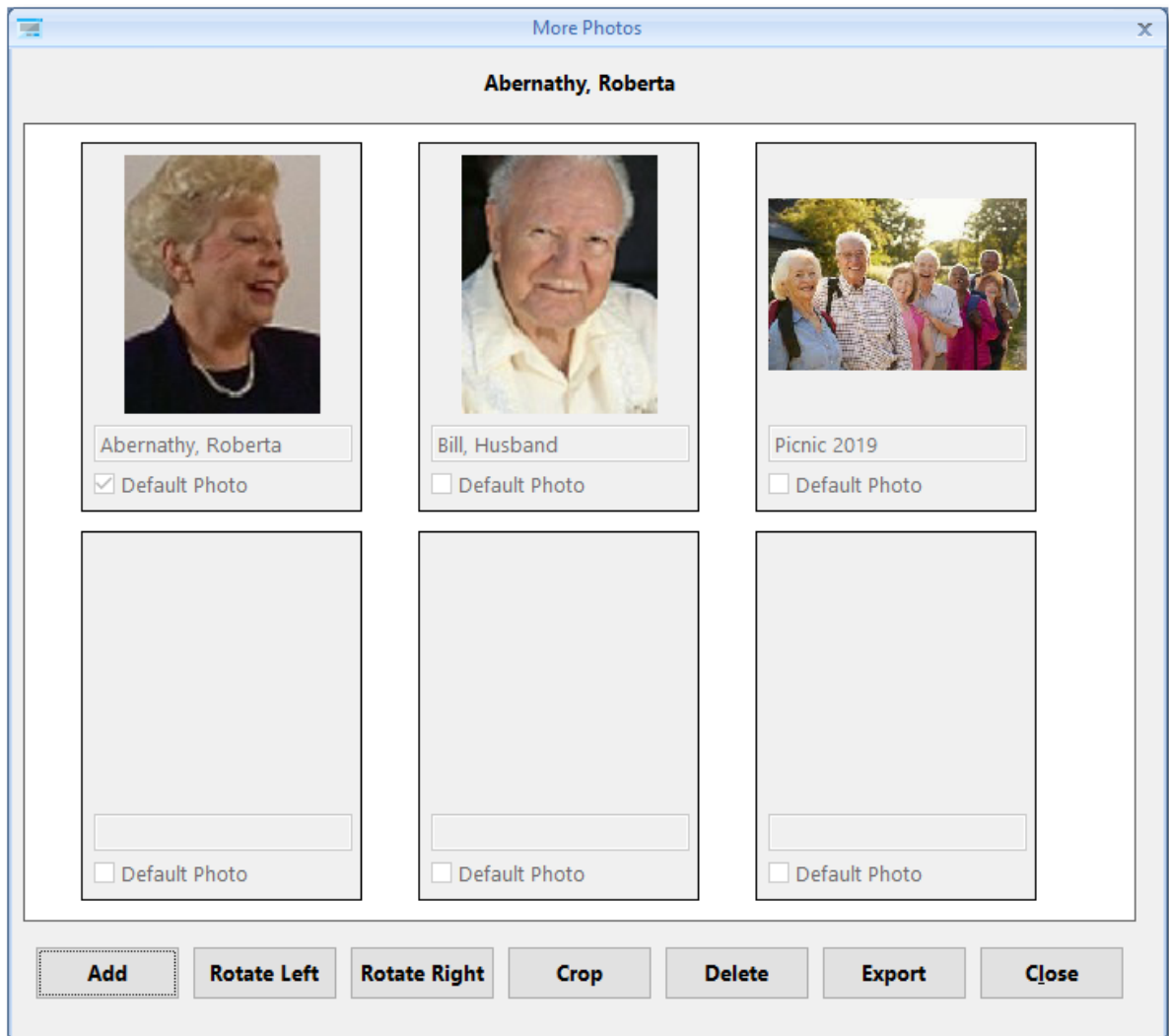
## Photos for Jobs/Clients

You can now also keep photo for jobs or clients. Just like volunteers, keep up to six photos for each client. For example, you might keep photos of both the client and a caregiver.



## Required Fields

In preferences, you can check which fields are required to be entered.

| Displayed Name | Use? | Req? |
|---|---|---|
| Second Address | ✔ | |
| City | ✔ | ✔ |
| ST | ✔ | ✔ |
| Zip | ✔ | ✔ |

## New Permissions for Documents

If you use passwords to access the Reporter, you now can set permissions for the documents tab of Volunteers, Stations, and Jobs. You can allow some users to just read the list of documents while prohibiting others from even seeing the documents tab.

### Added Document List to Profile Reports

On Profile reports where you can choose which information to include about either volunteers, stations, or jobs, you can now also include a list of documents on file for each.

| Gender | Female |
|---|---|
| **Added** | 07/01/2005 |
| **Revised** | 10/13/2017 |
| **Documents** | Background Check Results Group Photo Lunch 2021 Intake Form Monthly Review |

### New Document Reports

Added new reports called Volunteer Documents, Station Documents, and Job Documents that list all documents for each.

| Name | Documents |
|---|---|
| Alligood, Ida Mae | Background Check Results Intake Form |
| Anderson, Barbara | Background Check Results Group Photo Lunch 2021 Intake Form Monthly Review |
| Anderson, Rosie Lee | Intake Form Montly Review |
| Angel, Ottie | |

### Filter by Document

Enabled filtering on every report as to whether each volunteer, station, or job either has a particular document, doesn't have that document, or doesn't have any documents at all.

**More Available Fields for Counts**

Each job now has six (up from two) available fields for additional counts.



**Bug Fixes**

The Client Counts by Special Need report is fixed to correctly count when the "job" is a "client".

For both Job and Station Codes 9-20 you can now enter blanks. In other words, you can now edit a job or station and remove a code by changing it to a blank. You have always been able to do with most codes, but mistakenly not with codes 9 through 20.

Fixed bug in Primary Placements report that would include volunteers without a primary placement even if "Just Primary Placements" was selected.
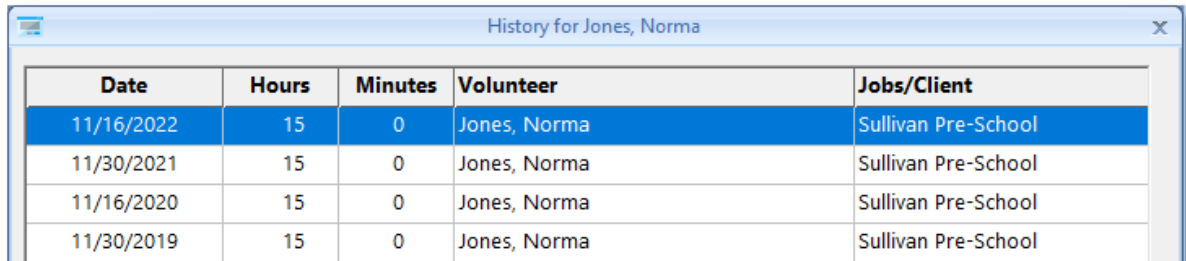
Fixed mistake in three Monthly Hours spreadsheets. When checked to include records with zero hours, it wasn't.

Fixed bug in Preferences. The per mile value was not saving three decimal places, just two.

## 18.21  New in Version 6.9

**Individual's History in Touch-Screen Assistant**

When managing the Touch-Screen Assistant, you now have the option of looking at any volunteer's history in a pop-up window. On both the "Who's Here?" and "Approve Hours" tab is a new **History** button. The button shows all hours already entered for the current volunteer in order with the most recent hours at the top. This will be handy to answer questions about a volunteer's past hours before either approving or editing their current session.

| Date | Hours | Minutes | Volunteer | Jobs/Client |
|------|-------|---------|-----------|-------------|
| 11/16/2022 | 15 | 0 | Jones, Norma | Sullivan Pre-School |
| 11/30/2021 | 15 | 0 | Jones, Norma | Sullivan Pre-School |
| 11/16/2020 | 15 | 0 | Jones, Norma | Sullivan Pre-School |
| 11/30/2019 | 15 | 0 | Jones, Norma | Sullivan Pre-School |

**Added Lists to Job DIY Spreadsheets**

On Job Do-It-Yourself Spreadsheets, you can now choose to include any of the five available lists of items, if you use them.

Selected Columns

- Job/Client Name
- Hobbies
- Health Issues
- List 3
- List 4
- List 5

Add >

< Remove
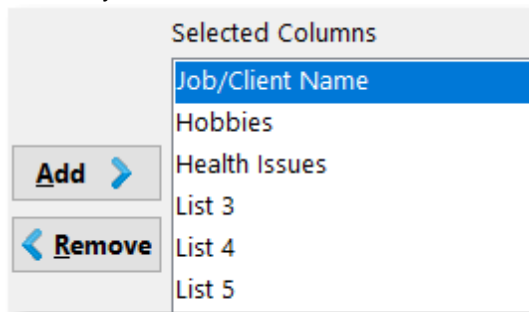
**Where are Hours Not Being Served?**

On all of the Hours Served, Detail reports and spreadsheets, when you choose to include records with zero hours, the report or spreadsheet now lists where the zero hours are. This means you can now easily see where a volunteer has not been serving or who is not showing up at a job. It used to just tell you who had zero hours, but not where they were missing.

```
---------------------------------
--- Detail by Volunteer
--- Detail by Station, Job, and Volunteer
--- Detail by Station and Volunteer
--- Detail by Job
---------------------------------
```

☑ Include volunteers with 0 hours
☑ Include volunteer subtotals
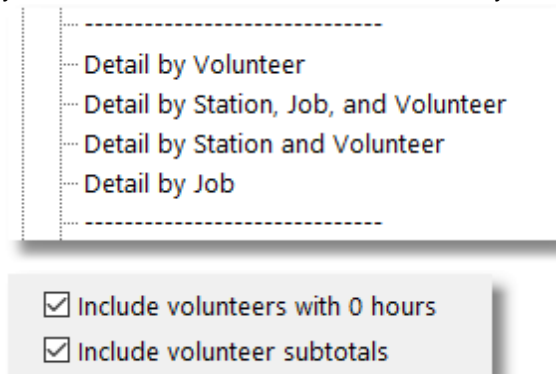
**Hours Served, Detail by Volunteer**
Includes volunteers with 0 hours, August 2022, Order: Alphabetical

9/8/2022
2:41:32 PM

| Name | Job | Hours |
|------|-----|-------|
| Arnold, Wanda | MPHS Companion Outreach2, MPHS Outreach Office | 12.00 |
| | Volunteer Subtotals: | 12.00 |
| Aune, Donald | Avery, Tom, Braille Workers, Inc. | 0.00 |
| Aune, Donald | Blood Drive, American Red Cross | 0.00 |
| Aune, Donald | Friendly Visiting - Lake County, Lake County Health Care | 0.00 |
| Aune, Donald | MPHS Nutrition Site, MPHS Nutrition Site | 21.00 |
| | Volunteer Subtotals: | 21.00 |

**Multiple Data Sets Customizing**

When changing from one dataset to another, the Reporter now resets the home screen to match the dataset. So, if you have several datasets, you can now have a separate, remembered home screen for each.

Home

Version: 6.9, Dataset: Default

| | |
|---|---|
| Volunteers | Reports |
| Stations | Spreadsheets |
| Jobs/Clients | Touch-Screen Assistant |
| Placements | Web Assistant |
| Hours | Close |
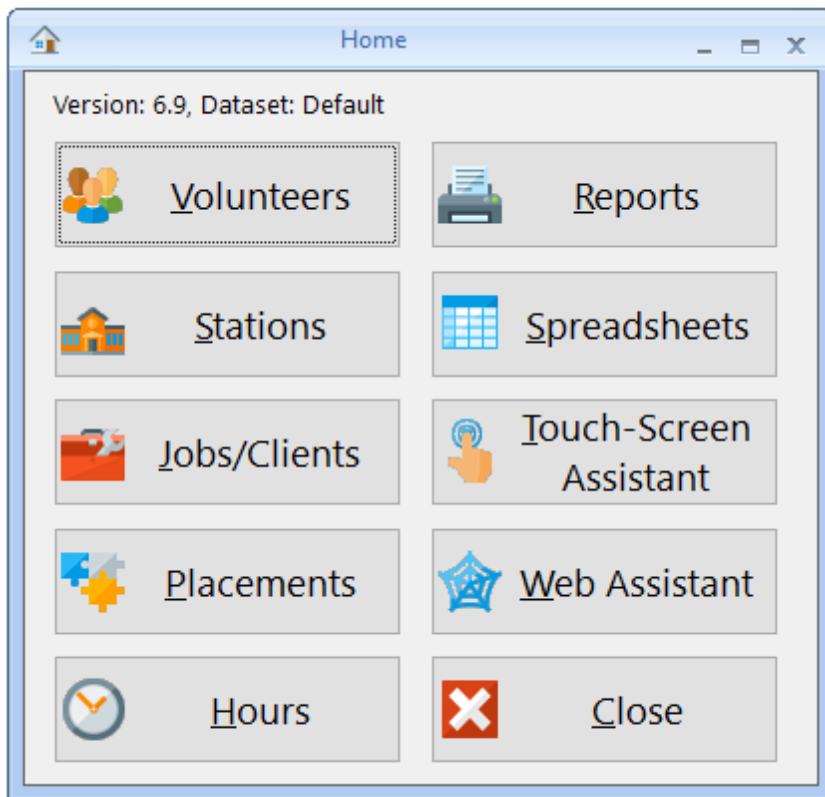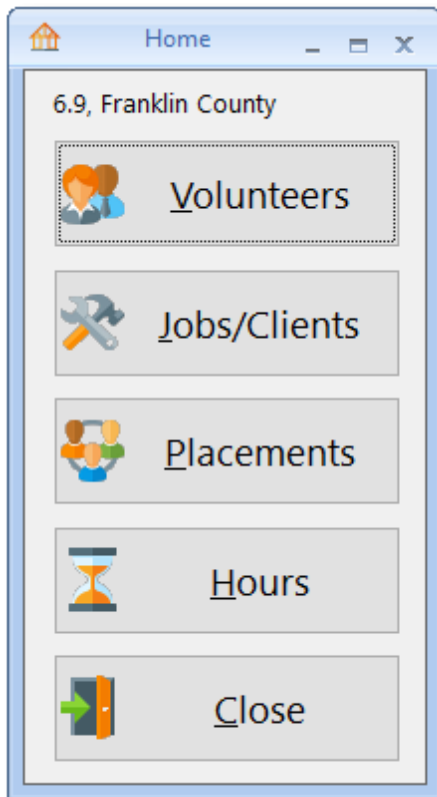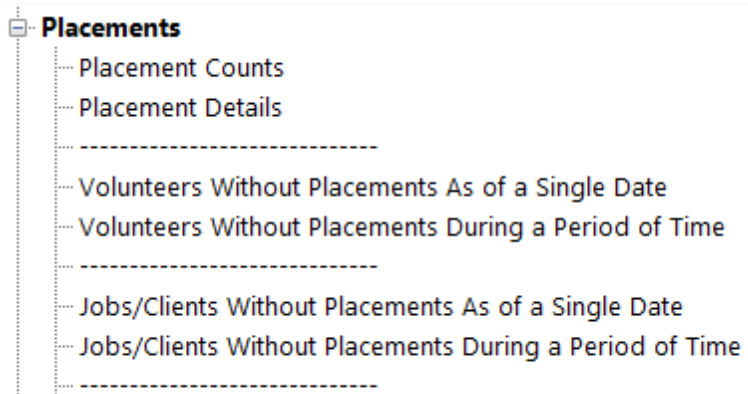
**Miles Driven on Spreadsheets**
All of the Hours Served Spreadsheets now include a column for car miles driven.

| Hours | Value Wage | Car Miles | Car Reimb | Bu |
|-------:|-----------:|----------:|----------:|----|
| 4.00 | 48.00 | 35.00 | 7.00 | |
| 22.00 | 264.00 | 7.00 | 1.40 | |
| 16.00 | 192.00 | 0.00 | 0.00 | |
| 13.00 | 156.00 | 0.00 | 0.00 | |
| 10.00 | 120.00 | 21.00 | 4.20 | |
| 17.00 | 204.00 | 28.00 | 5.60 | |
| 2.00 | 24.00 | 21.00 | 4.20 | |

**New Placement Reports**
Two new reports about Jobs or Clients without Placements, matching the same reports for Volunteers.

```
Placements
    Placement Counts
    Placement Details
    -----------------------------
    Volunteers Without Placements As of a Single Date
    Volunteers Without Placements During a Period of Time
    -----------------------------
    Jobs/Clients Without Placements As of a Single Date
    Jobs/Clients Without Placements During a Period of Time
    -----------------------------
```

**Bug Fixes**

Removed ability to change the icon for both Schedules and Help since neither of them ever use an icon.

Removed the phrase "CD Labeled" from Upgrade Wizard since we now always distribute the Reporter electronically.

Modified the Station Email and Web List to format web addresses better, especially when this report is exported as a spreadsheet.

Removed reference to numerical IP address for apps.volsoft.com when setting up the Web Assistant.
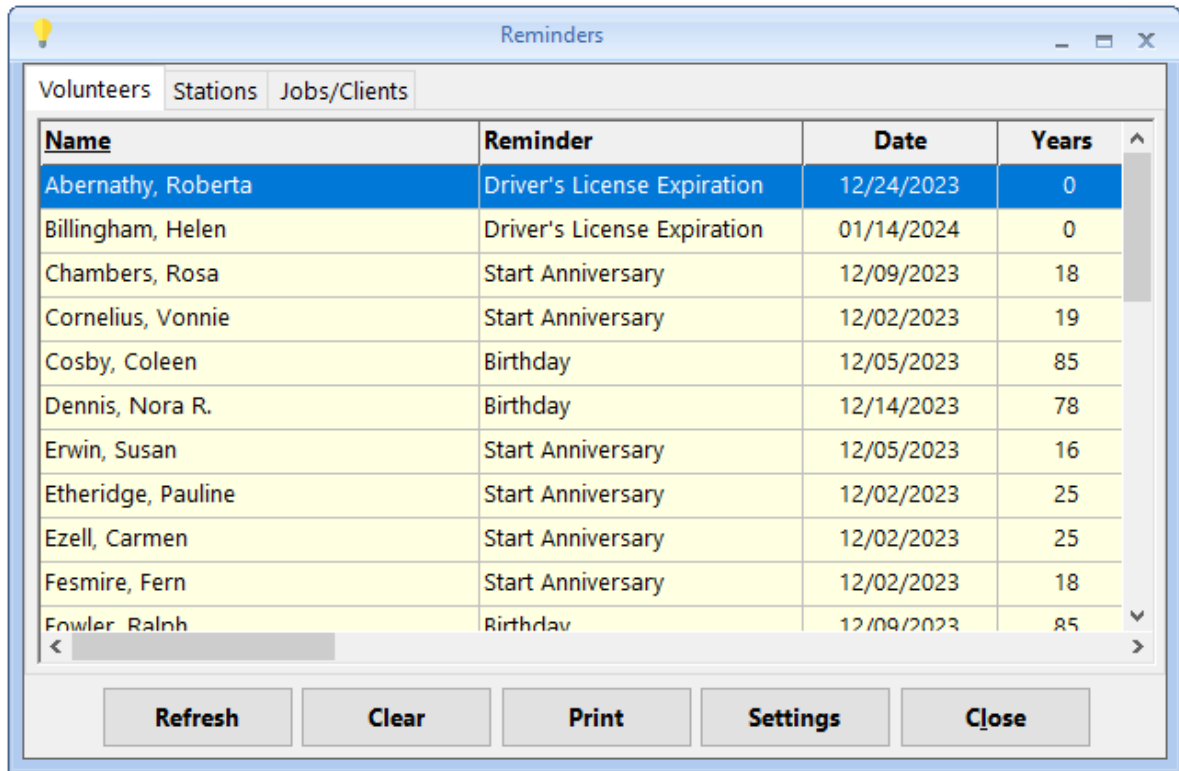
On Hours grid, if you sort by either date or hours, the find field is now disabled since it doesn't work for those types of data.

Widened the drop down boxes for both Focus Area Objectives and Service Activities in order to fit some of the choices.

## 18.22 New in Version 7.0

**Reminders**

The Reporter will now remind or alert you to upcoming dates for volunteers, stations, and jobs. It's simple to set up and then works automatically to remind you of upcoming deadlines or renewals.



You start Reminders from either the top menu under Reporting or from the lightbulb icon on the toolbar.



At first, there won't be any reminders until you set them up. Click on the Settings button and set a reminder for any date field. For example, set a reminder for a volunteer's driver's license expiration to be 60 days in advance. From then on the Reporter will remind you 2 months before every volunteer's driver license expires. In the same way you can set up reminders for any date in Stations and Jobs. You can also choose to have the reminder screen open automatically every time you start the Reporter.

When viewing reminders, click on the column heading for Name, Reminders, or Date to sort the reminders that way.
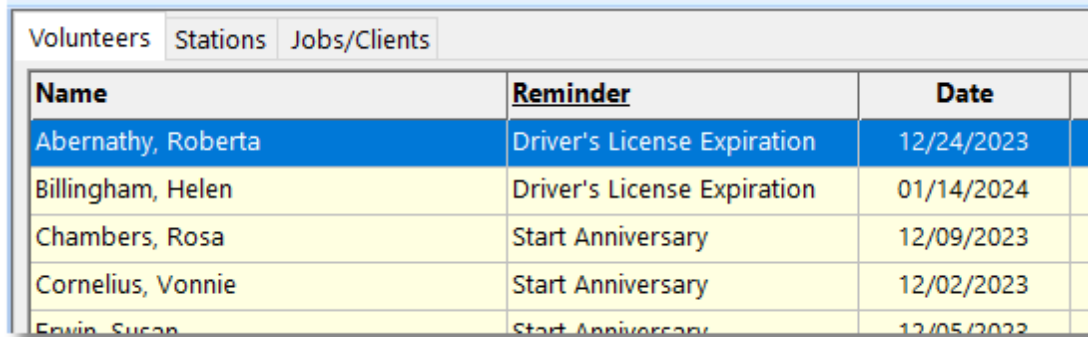


If you only want some users to see reminders you can set their access level under File | Users to be either read-only or none.

Just as for every other sections of the Reporter you can change the Reminder icon as well as the name itself. Click on File | Preferences to change the Reminder icon or name as well as every other icon and section name.
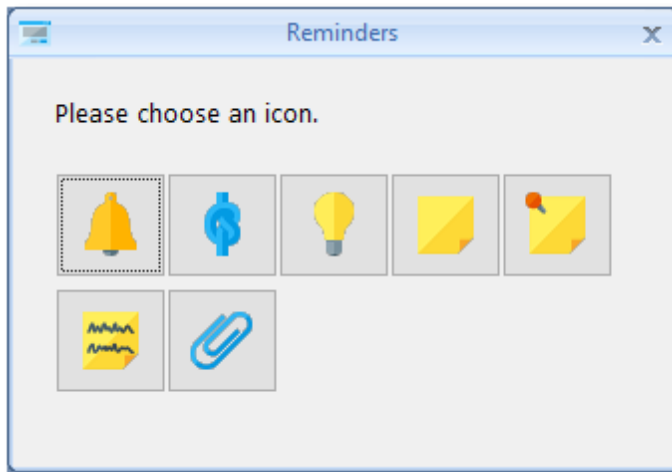
**Extra Detail for Hours**

The Reporter has always made it easy for you to work with hours by reporting on just the hours you want to see and summarizing them with subtotals and totals. Sometimes however, you need to see more detail about hours entries, usually when sorting out a discrepancy or duplication. The Reporter now helps by tracking where the hours came from and listing the complete details.

A new spreadsheet called "Every Hours Entry" shows the raw data as it was entered, each hours record without any grouping or totalling. Since it results in an Excel spreadsheet you can still total it manually in Excel.
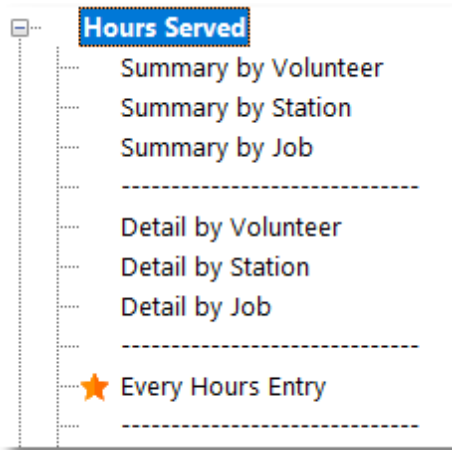


This can take a long time to prepare and produce a large spreadsheet because it lists every hours entry made without the usual summation.

In addition to this spreadsheet, the Reporter now keeps track of who actually entered each hours record. Every time a new hours record is added, the Reporter notes who entered it, which can't ever be changed. If the hours came from either the Touch-Screen Assistant or the Web Assistant, that is also noted as well as who approved the hours. And for hours from the Web Assistant, we also note whether they were entered by the volunteer or by the station supervisor.

These new fields will be blank for existing hours, of course.

You can see these new hours fields, Entered By, Approved By, and Sent By on the hours grids as well as on the new spreadsheet, Every Hours Entry. You cannot see this information on any other hours reports or spreadsheets since they all group records together from different sources.

| b. | Entered | Entered By | Approved By | Sent By |
|---|---|---|---|---|
| | 11/29/2023 | Mary | | |
| | 11/29/2023 | Touch-Screen Assist. | Mary | |
| | 10/01/2012 | Web Assistant | Mary | Vol |
| | 05/18/2012 | Web Assistant | Mary | Vol |

Technical Note: Logging into the Reporter with a name and password is optional. If you are not using this option the Reporter will use the Windows username when adding new hours instead. In most cases this will work well, but if you share a computer without each person signing in and out, the "Entered By" field on hours might not be accurate.

### Additional List Fields for Stations and Jobs
Like in Volunteers, you now have five available list fields to use for any purpose as well as five list fields with dates. Use a list field to track information where a station or job might have more than one of each.

Departments:
- ☐ Cafeteria
- ☑ ER
- ☐ Front Desk

Inspections:
- ☑ Initial -- 11/01/2022
- ☑ New Supervisor -- 11/01/2022
- ☐ Yearly

Job skills is an obvious example that we are already familiar with because a job often requires more than one skill. A possible use would for inspections where you would list a half dozen different type of regular inspections and then check off which ones had been completed for each station or job.

In general, a list is for data where a station or job will sometimes need more than one checked. On the other hand, if a station or job can only have one, it is much better to use a Code Field.

### Donation Sorting
Donations have always been shown with the oldest ones first. Now you can list them with the newest at the top, your choice. Click on the "Date" column heading to swap the order of donations.
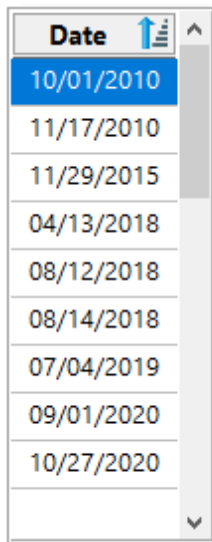
**New Spreadsheet of Users and Access Levels**
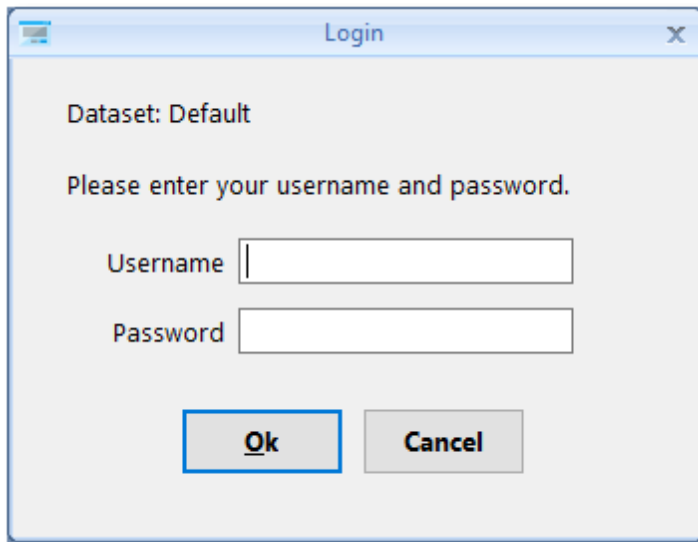
If you work with users and limit access levels to different sections of the Reporter you can now produce a spreadsheet of all usernames and access levels. The spreadsheet does not include any passwords. This will be useful to help you see and sort out who has access to every section. Since it is an Excel spreadsheet, you can sort it on any column to make it easier to find unexpected access levels.
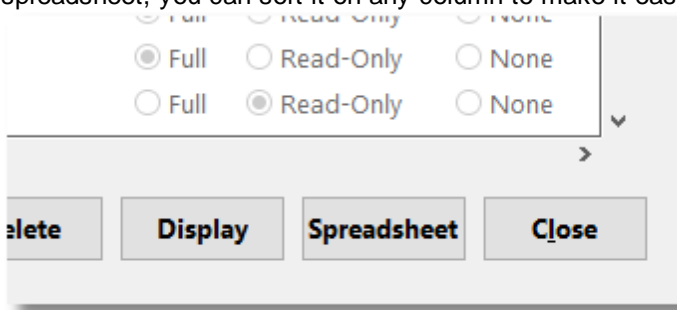


| | A | B | C | D | E | F | |
|---|---|---|---|---|---|---|---|
| 1 | Username | Administrator? | Volunteers | Vol Comments | Vol Documents | Stations | Sta Co |
| 2 | Allen | FALSE | Read-Only | Read-Only | Read-Only | Read-Only | Read-( |
| 3 | Betty | TRUE | Read-Only | None | None | Read-Only | None |
| 4 | Bill | FALSE | Full | Full | Full | Full | Full |
| 5 | Chloe | FALSE | Full | None | None | Full | None |
| 6 | Christine | FALSE | Full | Read-Only | Read-Only | Full | Read-( |
| 7 | Darci | FALSE | Full | Read-Only | Full | Full | Read-( |

**Logging In**

When asking for a username and password, the Reporter now displays which dataset is being opened. For users with multiple datasets each with separate passwords, this change will avoid having to remember which dataset was last open.

**Bug Fixes**
Fixed a mistake where the customized home screen didn't always save correctly.

You were not able to make bulk replacements on zip codes, but now you can.

Spreadsheets sometimes would leave a blank line with the data either missing or duplicate a line.

The two Volunteers Without Placements reports were not correctly formatting email addresses. This was especially noticeable when exported as an Excel spreadsheet.

# 18.23  New in Version 7.1
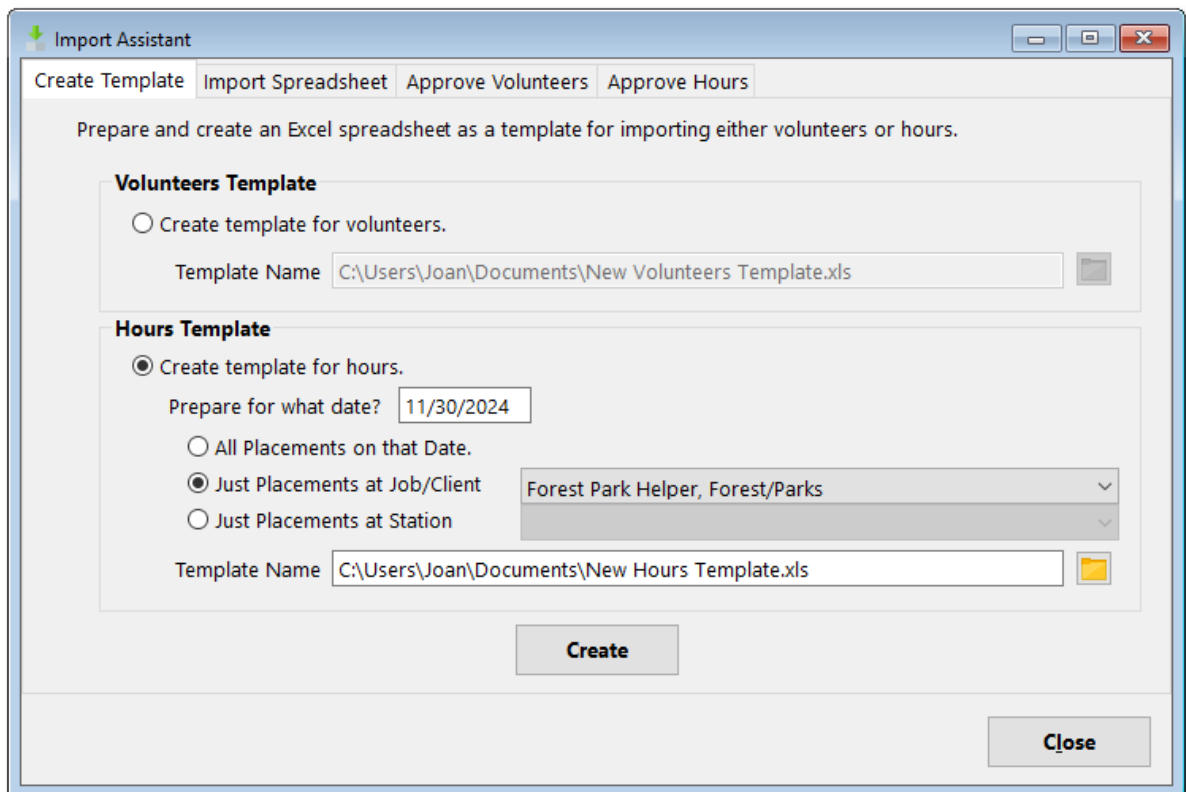
The new Import Assistant imports data about either new volunteers or hours into the Reporter all at once. For example, you could collect information about new, potential volunteers on a laptop at a job fair and then import all of that new data into the Reporter when you return to the office. Or you could have a job enter the hours served by each of their volunteers onto a spreadsheet and then import all of the hours at once. It's pretty slick and useful for a variety of situations.

The concept is that the Reporter prepares a blank, formatted Excel spreadsheet for you. You (or someone else) then enters either volunteer or hours data onto that spreadsheet. After you fill the spreadsheet with the new data you then import it back into the Reporter. After approval, the data automatically becomes part of your dataset as if you had entered it directly into the Reporter.

The Reporter uses an Excel spreadsheet in order to ensure that the data is in the correct format for importation. You can confidently share the blank spreadsheet template with others to fill in knowing that the data will import correctly into the Reporter.

The work flow for the Import Assistant is laid out on the four tabs. It's simple to go from one step to another and the whole importing process flows easily. The Reporter does all the heavy lifting for you.



The steps are:
1. Create a blank Excel template that will be used to collect either new volunteers or hours.
2. Either enter data onto the template yourself or send it to someone else to fill in with data.
3. Import the completed spreadsheet. This will bring the data from the spreadsheet into a

holding area waiting for your approval.
4. Approve the data either one at time or all at once. Approval adds it automatically into your existing data.

For more information refer to the [Import Assistant](#) chapter.

### Focus Area Objectives and Service Categories
Five years ago the official list of Focus Area Objectives and Service Categories was updated with lots of changes. Ever since then the Reporter has still included the outdated ones so that you could update your jobs with the new, official ones. In order to make the drop down list of Service Categories shorter we are now removing all of the outdated ones.

During the upgrading process to version 7.1, all of the outdated Service Categories are removed and you are given a list of jobs needing to be updated with Service Categories from the current list, if any.
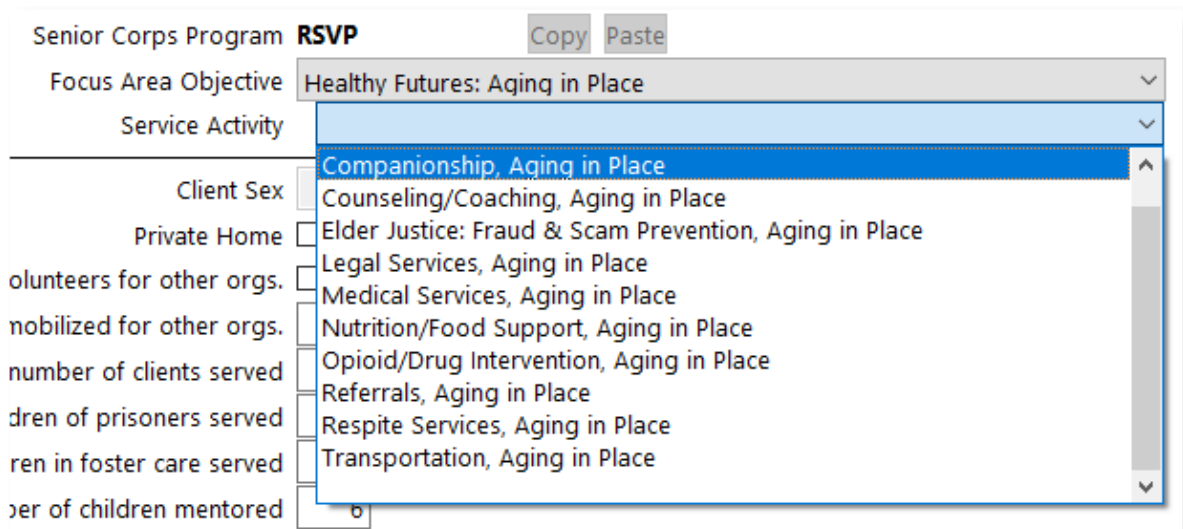


In addition, there have been a few additions to the list of Service Categories for RSVPs and one removal.

New Service Categories for RSVPs are:
Education: K-12 Success, Social and Emotional Support
Healthy Futures: Aging in Place, Counseling/Coaching
Healthy Futures: Aging in Place, Referrals
Veterans and Military Families: Veterans & Families Served, Elder Justice: Fraud & Scam Prevention, Veterans & Families Served

Removed and no longer available for RSVPs is:
Healthy Futures: Access to Care, Disability Inclusion

### Larger Reimbursements
Some people enter hours and reimbursements for periods longer than a month at a time. For example, you might want to enter the hours for a six month service period. The Reporter can now handle very large reimbursement amounts so that you don't have to work around the previous limits by splitting the hours and reimbursements over two or more entries.

**Bug Fixes**
Email service now works with SSL encryption.

File Backup works with even huge data sets with lots of documents.

Empty, blank donations can no longer mistakenly be added and any existing ones are removed.

# 19    Additional Help

## 19.1    Tutorials

Learn how to use the Reporter by reading tutorials on our web site at www.volsoft.com.

## 19.2    Free Support

**Web/Email**
www.volsoft.com
support@volsoft.com

We keep answers to common problems up to date on our web site. You can always ask email questions for free.

**Telephone**
800-391-9446 or 406-721-0113

With your original purchase you receive one year of free telephone technical support and software upgrades.  After a year, you can still receive telephone help with the purchase of a Technical Support Plan.

**Mail**
Volunteer Software
628 South Second Street West
Missoula, Montana 59801-1830

## 19.3    Technical Support Plan

With your original purchase you receive a year of free telephone technical support and software upgrades. After that, you can purchase unlimited toll-free telephone help and software upgrades on a yearly basis. This ensures you get the most out of your Reporter because you always have the newest version and you can call whenever you need an answer.

And, of course, the call is free. Our toll free number is 800-391-9446

• Unlimited toll-free telephone support.
• All software upgrades are sent to you free.
• At least one software upgrade guaranteed.

The Support / Upgrade Bundle is optional, but it's the only way to receive telephone technical support or to upgrade the Reporter. You cannot buy either support or upgrades separately because we've found you'll be most productive when you have the latest version of the Reporter and when you feel free to call and ask questions.

You can always ask questions for free via email at support@volsoft.com. We try to respond as quickly as possible, but if we experience a backlog, our telephone support gets first priority.

Sorry, but we can only offer technical support for the Reporter, not general computer questions or problems.

# 20    License and Warranty

## 20.1    License and Warranty

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- You may use the Volunteer Reporter on any number of computers within a single office. Any number of people within that single office may use the Volunteer Reporter at the same time. You may use the Volunteer Reporter to access any number of data sets within that single office.

- You must purchase an additional copy of the Volunteer Reporter for use in each additional office. Each additional office is defined by either being in a separate building or having a separate telephone number. It does not matter if the additional office is on the same computer network, or shares the same set of data, or is staffed by the same people, or shares the same funding source, if it is in a separate building or has a separate telephone number, you must purchase an additional copy of the Volunteer Reporter for it.

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- In the event that Volunteer Software is unable to correct the substantial program errors during that period, Volunteer Software will refund your purchase price and the license will terminate. These are your sole remedies for any breaches of warranty.

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The license granted hereunder shall terminate upon your failure to comply with the terms and conditions of this Agreement.

The Agreement shall be interpreted by the laws of the State of Montana, and any dispute resolution shall have venue in Missoula County, Montana.

You may not assign this Agreement without the written consent of Volunteer Software. This Agreement shall be binding upon the respective successors and assigns of the parties.

This Agreement sets forth the entire agreement of the parties and supersedes all prior understandings and agreements, written or oral.

BY USING THIS PROGRAM, YOU ACKNOWLEDGE THAT YOU HAVE READ THIS AGREEMENT, UNDERSTAND ITS CONTENTS, AND AGREE TO BE BOUND BY ITS TERMS AND CONDITIONS.

Volunteer Software, 628 S 2nd St W, Missoula, MT 59801-1830, (406)721-0113

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