

The Raiser's Edge™

Volunteers & Jobs Data Entry Guide

020112

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What Is In This Guide?



In the *Volunteers & Jobs Data Entry Guide*, you learn how to track volunteer information on the Volunteer tab of a constituent record. Information includes volunteer types and statuses, emergency contact information, volunteer qualifications, medical information, volunteer special needs and availability, checklists of tasks a volunteer must complete before starting a job, and volunteer award information. You also learn how to set up job records in your database. You can also learn about the following:

- “Job Assignments on the Volunteer Tab” on page 43
- “Time Sheets on the Volunteer Tab” on page 54
- “Volunteer Mandate Information” on page 74
- “Summary on the Volunteer Tab” on page 78
- “Details on the Job Record” on page 89
- “Job Assignments on the Job Record” on page 104
- “Job Attributes” on page 116

How Do I Use These Guides?

The Raiser’s Edge user guides contain examples, scenarios, procedures, graphics, and conceptual information. To find help quickly and easily, you can access the *Raiser’s Edge* documentation from several places.

User Guides. You can access PDF versions of the guides by selecting **Help, User Guides** from the shell menu bar or by clicking **Help** on the Raiser’s Edge bar in the program. You can also access the guides on our Web site at www.blackbaud.com. From the menu bar, select **Support, User Guides**.

In a PDF, page numbers in the Table of Contents, Index, and all cross-references are hyperlinks. For example, click the page number by any heading or procedure on a Table of Contents page to go directly to that page.

Help File. In addition to user guides, you can learn about *The Raiser’s Edge* by accessing the help file in the program. Select **Help, The Raiser’s Edge Help Topics** from the shell menu bar or press **F1** on your keyboard from anywhere in the program.

Narrow your search in the help file by enclosing your search in quotation marks on the Search tab. For example, instead of entering Load Defaults, enter “Load Defaults”. The help file searches for the complete phrase in quotes instead of individual words.

Introduction to Volunteers and Jobs



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Warning: Modules such as *Volunteer Management* and *Event Management* enable you to customize *The Raiser's Edge* to meet the specific needs of your organization. When you use a Blackbaud module, you are given a code. You must enter this code to “unlock” or activate the module. For more information, see the *Program Basics Guide*.

The optional module *Volunteer Management* enhances *The Raiser's Edge* by giving you the ability to track all aspects of your volunteers. When you add a volunteer to your database, you first need to add the volunteer as a constituent. Then, you can start tracking volunteer information on the Volunteer tab of his constituent record. When you enter information on the Volunteer tab, the constituent becomes active in *The Raiser's Edge* as a volunteer for your organization.

The screenshot shows the 'Volunteer' tab for a constituent named David B. Murphy. The interface includes a menu bar (File, Edit, View, Constituent, Letter, Favorites, Tools, Help) and a toolbar with various icons. Below the menu bar, there are several tabs: Bio 1, Bio 2, Addresses, Addressees/Salutations, Relationships, Appeals, Notes, Gifts, Attributes, Media, Actions, Honor/Memorial, Volunteer (selected), Prospect, Membership, and Events. A navigation pane on the left lists various sections: General, Qualifications, Medical/Special Needs, Availability/Interests, Job Assignments, Time Sheets, Awards, Mandate Info, Checklist, and Summary. The main area displays a table titled 'Volunteer Types' with columns for Type, Status, Start Date, End Date, and Reason Finished. Below the table are form fields for Emergency Contact (Name: Margaret Murphy, Relation: Wife, Phone: 617-555-8814) and Vehicle Information (Personal vehicle available for use: checked, Vehicle Type: Truck, Comment: Can use truck for volunteer work).

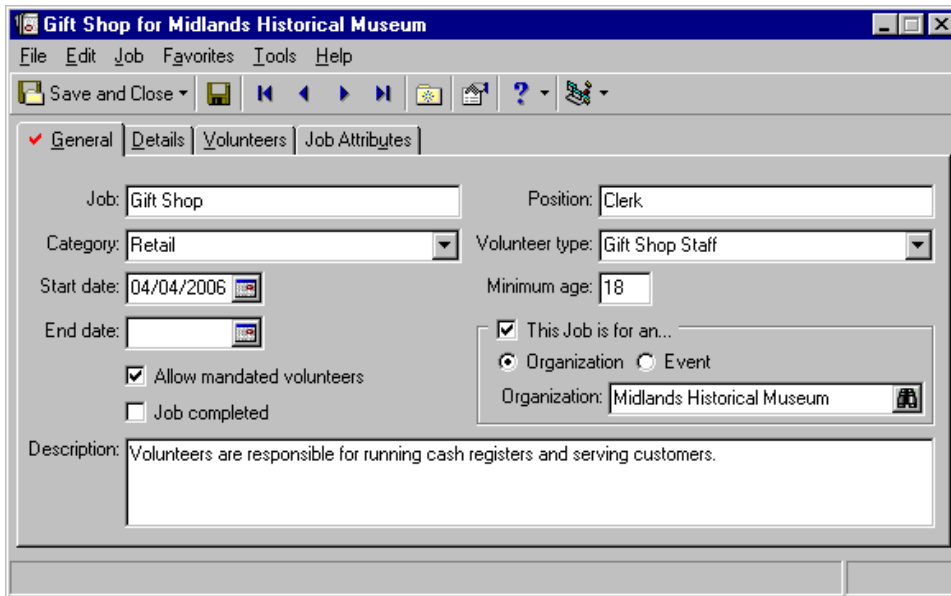
Volunteer Types				
Type	Status	Start Date	End Date	Reason Finished
Lawn Maintenance	Active	03/16/2006		

Emergency Contact
 Name: Margaret Murphy
 Relation: Wife
 Phone: 617-555-8814

Vehicle Information
 Personal vehicle available for use
 Vehicle Type: Truck
 Comment: Can use truck for volunteer work

From the Volunteer tab, you can assign volunteer types and statuses, enter an emergency contact, and track vehicle information for the volunteer. You define qualifications the volunteer must have for certain jobs, track your volunteer's medical information and special needs, and determine when the volunteer can work. You can also match a volunteer's particular interests with enjoyable jobs and create checklists of tasks the volunteer must complete before starting these jobs. You can then track awards given to the volunteer, the amount of service needed to obtain these awards, and the next award the volunteer should receive if he completes the required amount of service. The Volunteer tab holds a lot of important information!

With *Volunteer Management*, you can also create job records in your database.



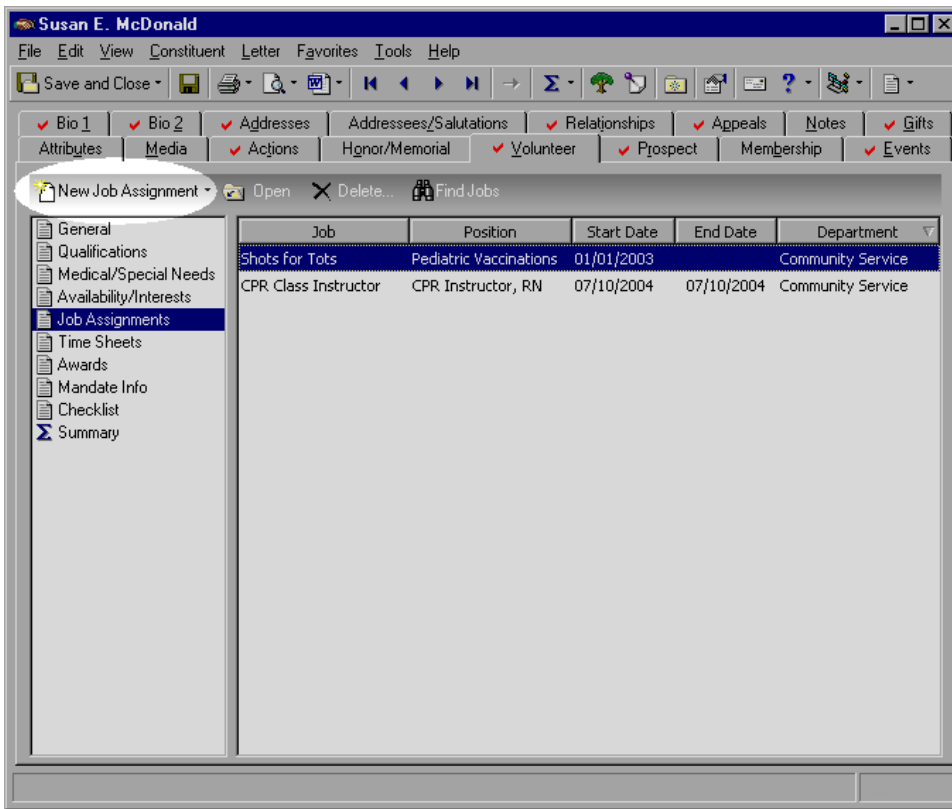
The screenshot shows a software window titled "Gift Shop for Midlands Historical Museum". The window has a menu bar with "File", "Edit", "Job", "Favorites", "Tools", and "Help". Below the menu bar is a toolbar with icons for "Save and Close", navigation (back, forward, home, search), and help. The main area has four tabs: "General" (selected), "Details", "Volunteers", and "Job Attributes". The "General" tab contains the following fields and options:

- Job: Gift Shop
- Position: Clerk
- Category: Retail (dropdown)
- Volunteer type: Gift Shop Staff (dropdown)
- Start date: 04/04/2006 (calendar icon)
- Minimum age: 18
- End date: (calendar icon)
- Allow mandated volunteers
- Job completed
- This Job is for an...
 - Organization
 - Event
- Organization: Midlands Historical Museum (dropdown with icon)
- Description: Volunteers are responsible for running cash registers and serving customers.

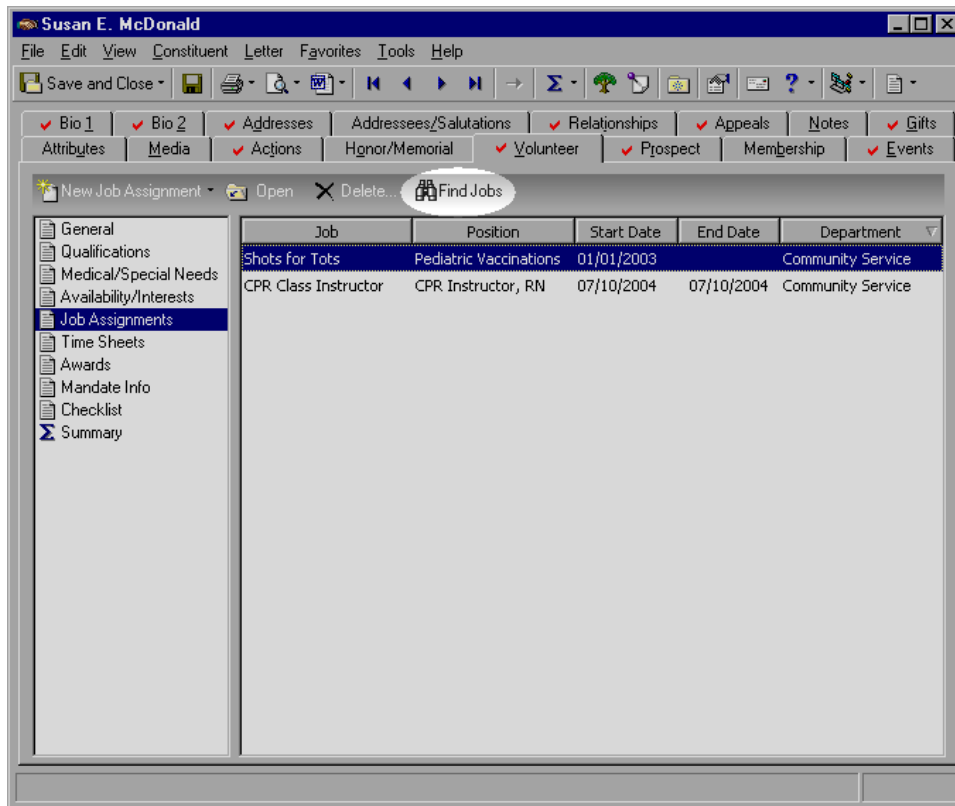
From a job record, you enter a category and position for the job, the start and end dates, whether you allow mandated volunteers to be assigned to the job, and mark the job as completed when it is finished. Here, you enter the type of volunteer needed for the job, a complete job description, and the minimum age your volunteers must be before they can be assigned to the job. If the job is for a particular organization or event, you can link the job to that organization or event record.

From a job record, you also enter the skills, experience, courses, and training a volunteer must have before being assigned to the job. You can list required medical information and particular volunteer special needs that can actually prevent a volunteer from being assigned to the job. You list attributes and assignment interests that help you assign appropriate volunteers to the job and establish checklist items that need to be completed before a volunteer can start working on the job.

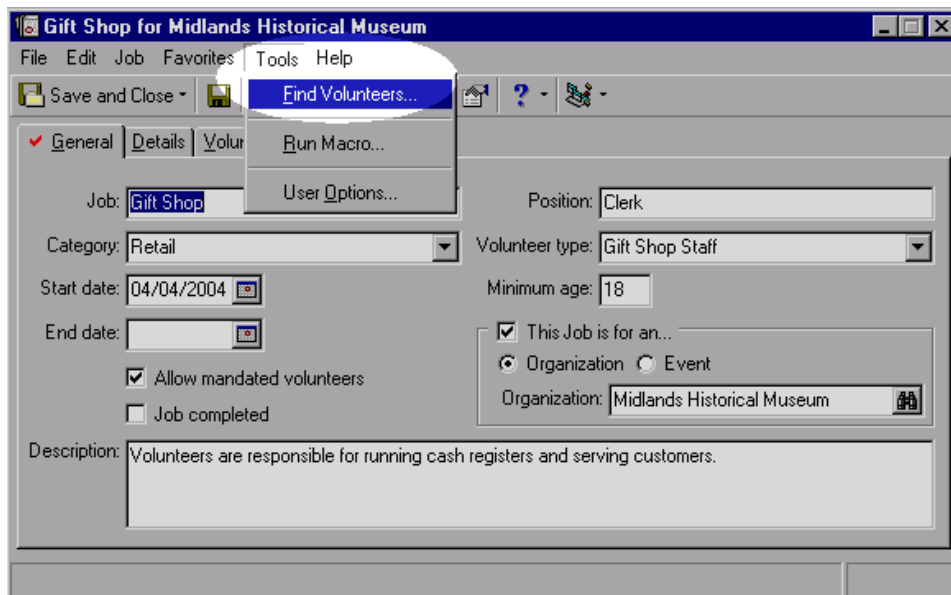
After you add job records to your database, you can manually find a job and assign it to a volunteer by using the **New Job Assignment** button on the Volunteer tab of his constituent record.



You can also automatically find jobs and assign them to a volunteer by using the **Find Jobs** button on the Volunteer tab of his constituent record.



For added convenience, you can also automatically find volunteers and assign them to a job by using **Tools, Find Volunteers** from the menu bar of the job record itself.



The two parts of *Volunteer Management* — volunteers and jobs — when used together, help you efficiently and effectively manage your volunteer program. In this guide, we first explain the Volunteer tab in its entirety starting with “Volunteers” on page 21. Then, we turn our attention to job records in “Jobs” on page 81. It is up to you to determine whether you rather add volunteers to your database first, or your jobs.

Frequently Used Terms

This section defines words and phrases you need to know as you work with volunteers and jobs. If you come across an unfamiliar term when reading this or any chapter in *The Raiser’s Edge* documentation, make sure you check the online glossary in the help file.

Assignment interest. An assignment interest is a task a volunteer expresses a desire to perform. For example, your organization is an aquarium. Rosa Shapiro lets you know she would like to help feed the seals or penguins. Because Rosa lets you know the tasks she is interested in, you can assign her to the jobs she enjoys. You can track volunteer assignment interests on the Volunteer tab of a constituent record.

Award. An award is something you present to a volunteer in recognition of outstanding service and loyal commitment. For example, you may present your volunteers with an engraved pen and pencil set when they complete 200 hours of service.

Checklist. A checklist is a “to do” list you assign to a volunteer. The list you create on the Volunteer tab of a constituent record contains the individual items you require a volunteer to complete before he can start a job. For example, your organization is an aquarium. Before a volunteer can start work, he must attend a volunteer training class, attend the Preserving Our Aquatic Environment seminar, and have a TB test. Checklists are important when determining the jobs a volunteer can actually be assigned. If the volunteer has not completed the checklist items, he should not be assigned to jobs listing these same checklist requirements.

Find Jobs button. **Find Jobs** is a button on the action bar on the Volunteer tab of a constituent record. You can use the **Find Jobs** button to automatically find multiple jobs and assign them to a volunteer. When you use the **Find Jobs** button, you can assign only those jobs having criteria that matches criteria listed on the Volunteer tab.

Find Volunteers menu option. **Tools, Find Volunteers** is found on the menu bar of a job record. You can use **Tools, Find Volunteers** to automatically find multiple volunteers and assign them to a job. When you use **Tools, Find Volunteers**, you can assign only those volunteers having criteria that matches criteria listed on the job record.

Future award. A future award is the next award a volunteer will potentially receive if he completes the service requirements for that award. For example, Jack Weber, a volunteer at your organization, received the 200 Hours Award at the last volunteer meeting. The next award Jack will receive is the 400 Hours Award, if he completes 400 hours of volunteer service. Because this is Jack’s next tentative award in the future, it is termed a “future award.”

Inactive award. An inactive award is an award you no longer want active. There are times when you need to make a volunteer award inactive. Perhaps you gave out an award in the past. You decide you no longer want to give out the award, now or in the future. For historic purposes, you do not want to delete the award from the Volunteer tab of every constituent who ever received the award, but you do want to ensure the award is no longer added to anyone else’s record. By marking the award inactive, you can ensure the award is no longer added to any volunteers’ constituent records, from this point on. If you ever decide to use the inactive award again, you can make the inactive award active.

Job. A job is a task, or miscellaneous piece of work, assigned to a volunteer of your organization. For example, your organization is a hospital and you run a gift shop. You have volunteers who come in to run the cash register and volunteers who come in to stock shelves. You have several volunteers who come in to create gift baskets and another volunteer who helps with computer data entry. Each of these tasks, performed by a volunteer, is a volunteer job.

Job assignment. A job assignment is a record you create when you assign a volunteer to a job. You can manually find a job and assign it to a volunteer by using the **New Job Assignment** button on the Volunteer tab of his constituent record or you can automatically find jobs and assign them to a volunteer by using the **Find Jobs** button on the same tab. For added convenience, you can also automatically find volunteers and assign them to a job by using **Tools, Find Volunteers** from the menu bar of the job record itself.

Mandate. A mandate is an official order from a court or public agency requiring that an individual serve some type of volunteer duty. If your organization accepts volunteers who need to fulfill mandates, you can track such information as the start date, the date the volunteer fulfilled the order, how many hours he served, the agency's name who ordered the mandate, and the person at the agency you should contact with questions and concerns about the volunteer or mandate. Mandate information is tracked on the Volunteer tab of a constituent record. When referring to a volunteer who is serving a mandate, you may see the term "mandated volunteer."

Medical information. Medical information consists of medical requirements needing to be fulfilled by your volunteers before you can assign them to a job. For example, your organization requires that volunteers have a TB test and a tetanus shot before they can start working on a particular job. On the Details tab of the job record, you enter the test and immunization as two medical information requirements. On the Volunteer tab of the volunteer's constituent record, you track the names of the immunization and test, the date the immunization and test were administered to the volunteer, and any comments you have concerning either procedure. Medical information helps you assign jobs specifying certain medical requirements with volunteers who have met the same medical requirements.

Qualification. A qualification is a skill, experience, course, or training a volunteer must have to qualify, or be accepted, as a volunteer for the jobs at your organization. For example, your humanitarian organization is looking for people with certain talents to help build homes for families in need. You are looking for volunteers with carpentry, plumbing, roofing, and painting skills. Your organization runs a health clinic and you are looking for volunteers with medical experience. Your organization requires that volunteers take a Health and Sanitation class before they start work in your soup kitchen or attend a Volunteer Orientation training session before they start any job. All these things are qualifications.

Special need. A special need indicates a volunteer's special consideration or request that can prevent her from being assigned to a job. For example, Rebecca Schmidt, a volunteer at your organization, lets you know she needs you to provide a baby-sitting service before she can volunteer at your upcoming phonathon. You are not providing a baby-sitting service at this event. On the Details tab of the phonathon job records, you enter Baby-Sitting Service so you can eliminate any volunteer having this special need. On the Volunteer tab of Rebecca's constituent record, you enter Baby-Sitting Service as a special need. When you assign volunteers to the phonathon jobs, Rebecca will potentially be eliminated because the special needs match. Special needs are beneficial for you and your volunteers because they help you schedule volunteers' work appropriately.

Tip: You can quickly enter your time sheets in a batch. For more information about the batch entry of time sheets, see the Time Sheet Batch chapter of the *Batch Guide*.

Time sheet. A time sheet summarizes the hours a volunteer worked at a particular job on a particular date. You can add Volunteer time sheets by using the **New Time Sheet** button on the Volunteer tab of a volunteer's constituent record. From a time sheet, you can search your database for the job you assigned a volunteer. Once you find the job, the job name, category, position, and volunteer type appear automatically on the time sheet. This information defaults on the time sheet from the job record itself. On the time sheet, you can also track job information such as the department under which the job falls, the location where the job took place, and the particular task performed. The time sheets you create for a volunteer list in a grid on the Volunteer tab of his constituent record.

Volunteer. A volunteer is a person who voluntarily undertakes a task, or a specialized piece of work, for an organization and expects no pay in return. For example, your organization holds a Spring Gala every year. Several members of the community help you plan the gala. Others help you decorate, send out invitations, and hire entertainment. You hold a golf tournament and two individuals offer to take event photos for your newsletter. A group of people come to your organization on a weekly basis to help with office work and computer data entry. The individuals who give their time to your organization and request no pay in return are volunteers.

Volunteer availability. The dates, days, and times each volunteer is available to work is the volunteer availability. For example, James Rooney, a volunteer at your animal shelter, lets you know he is available to work every Friday this year, from 8:00 a.m. until noon. You can track volunteer availability on the Volunteer tab of a constituent record.

Volunteer status. Volunteer status denotes whether a volunteer is active or not. A volunteer can have multiple statuses. For example, Shannon Thompson, a volunteer at your organization, is assigned two volunteer types: Gift Shop Staff and Business Office Staff. Shannon is currently working in the gift shop and has discontinued working in your business office. She worked in your business office regularly last year. In the **Volunteer Types** grid, you can assign the status of Active in the **Status** column on the same row as the Gift Shop Staff type and a status of Inactive on the same row as the Business Office Staff type.

Volunteer type. Volunteer type denotes the capacity in which a volunteer can serve your organization. For example, Ashley Ziegler, a volunteer with your organization, works in your gift shop. You assign a **Type** of “Gift Shop Staff” in the **Volunteer Types** grid on the Volunteer tab of her constituent record. A volunteer can be multiple types. For example if Ashley also starts volunteering in your business office, you can add another **Type** of “Business Office Staff” in the **Volunteer Types** grid.

Navigating in Volunteers & Jobs

To effectively navigate in *Volunteer Management*, you must know how to quickly open a constituent record to access the Volunteer tab. You must also know how to quickly open a job record. This section explains how to do both. Later in the guide, you will learn how to add volunteer information for a constituent who is a volunteer with your organization and also how to add job records.

Accessing the Volunteer Tab of a Constituent Record

Tip: You can use shortcut keys to move around *The Raiser’s Edge* without using your mouse. For example, press **CTRL + S** on your keyboard to save a record.

When you start tracking information about a volunteer in *The Raiser’s Edge*, you must access the Volunteer tab of his constituent record. Before you can access the Volunteer tab, you first need to add or open the constituent record. Once a constituent record is in the database, you can open the record from the shell **File** menu, from the **File** menu of an existing constituent record, and from the Constituent page of *Records*. We recommend opening constituent records from *Records* because it allows the easiest and most complete access to all record types.

▶ Accessing the Volunteer tab of a constituent record

The following procedure shows you how to quickly open a constituent record to access the Volunteer tab. For more information about adding a constituent record, see the Biographical Information chapter of the *Constituent Data Entry Guide*.

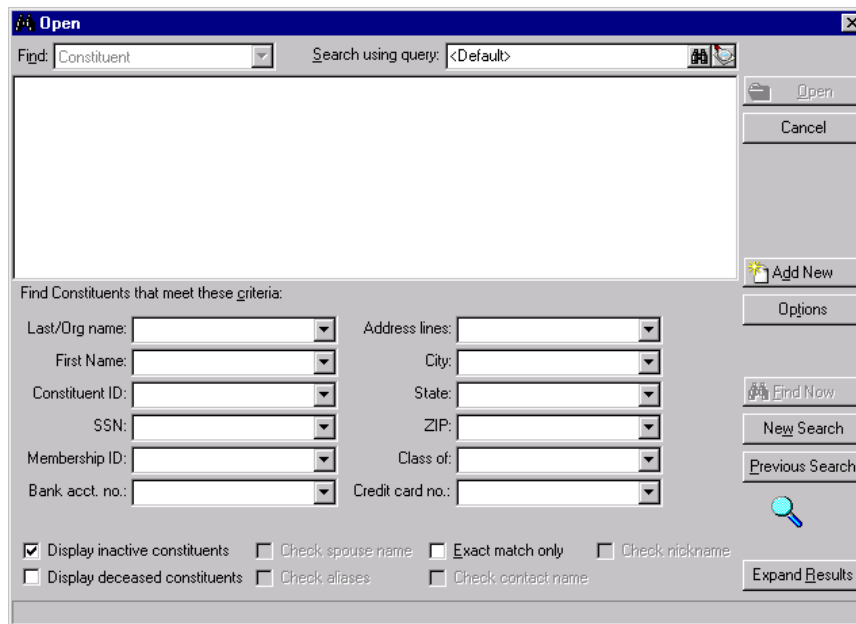
1. On the Raiser’s Edge bar, click **Records**.

2. Click **Constituents**. The Constituents page appears.



Note: For complete details on all fields, checkboxes, and buttons on the Open screen, see the *Program Basics Guide*.

3. Click **Open a Constituent**. The Open screen for Constituents appears.



Warning: We recommend you search by one or two of the most helpful criteria types because the results that appear in the grid must match all criteria you enter. Adding too much criteria information in the **Find Constituents that meet these criteria** fields can actually prevent you from finding the constituent.

4. Under **Find Constituents that meet these criteria**, decide what criteria you want to use when searching for your constituent and enter the information in the appropriate criteria fields. The criteria you can use include the constituent's first or last name, ID, Social Security Number, membership ID, bank account number, address lines, city, state, ZIP, graduating class, and credit card number.

Find: Constituent Search using query: <Default>

Find Constituents that meet these criteria:

Last/Org name: Smith Address lines: City: State: ZIP: Class of: Credit card no.:

First Name: City: State: ZIP: Class of: Credit card no.:

Constituent ID: State: ZIP: Class of: Credit card no.:

SSN: ZIP: Class of: Credit card no.:

Membership ID: Class of: Credit card no.:

Bank acct. no.: Credit card no.:

Display inactive constituents Check spouse name Exact match only Check nickname
 Display deceased constituents Check aliases Check contact name

Note: You can enter the first few letters or characters in the **Find Constituents that meet these criteria** fields if you do not know the correct spelling or number. For detailed information about how to use these fields, see the *Program Basics Guide*.

5. Click **Find Now**. If the search criteria you entered matches a constituent in the database, it lists in the grid on the Open screen. Depending on how limited or detailed your criteria are, the program may find one record or many records.

Find: Constituent Search using query: <Default>

Constituent Name	Address Block	City, State	Constituent ID
John T. Smith	621 Winder Road	Louisville, KY	71
Stephanie G. Smith	515 Morning Dove Lane	Tempe, AZ	72
Smith, Wesley & Bren...	152 Capital Lane	Washington, DC	110

Find Constituents that meet these criteria:

Last/Org name: Smith Address lines: City: State: ZIP: Class of: Credit card no.:

First Name: City: State: ZIP: Class of: Credit card no.:

Constituent ID: State: ZIP: Class of: Credit card no.:

SSN: ZIP: Class of: Credit card no.:

Membership ID: Class of: Credit card no.:

Bank acct. no.: Credit card no.:

Display inactive constituents Check spouse name Exact match only Check nickname
 Display deceased constituents Check aliases Check contact name

3 records found.

6. In the grid, select the constituent record you want to open.

7. Click **Open**. The constituent record appears.
8. Select the Volunteer tab.

The screenshot shows the 'John T. Smith' constituent record in The Raiser's Edge software. The 'Volunteer' tab is selected, displaying a table of volunteer types and form fields for emergency contact and vehicle information.

Volunteer Types					
Type	Status	Start Date	End Date	Reason Finished	
Lawn Maintenance	Active	03/16/2004			
General	Active	01/01/2006			

Emergency Contact:

Name: Herbert Smith

Relation: Brother

Phone: 502-555-8129

Vehicle Information:

Personal vehicle available for use

Vehicle Type: Truck

Comment: Will use truck for volunteer work

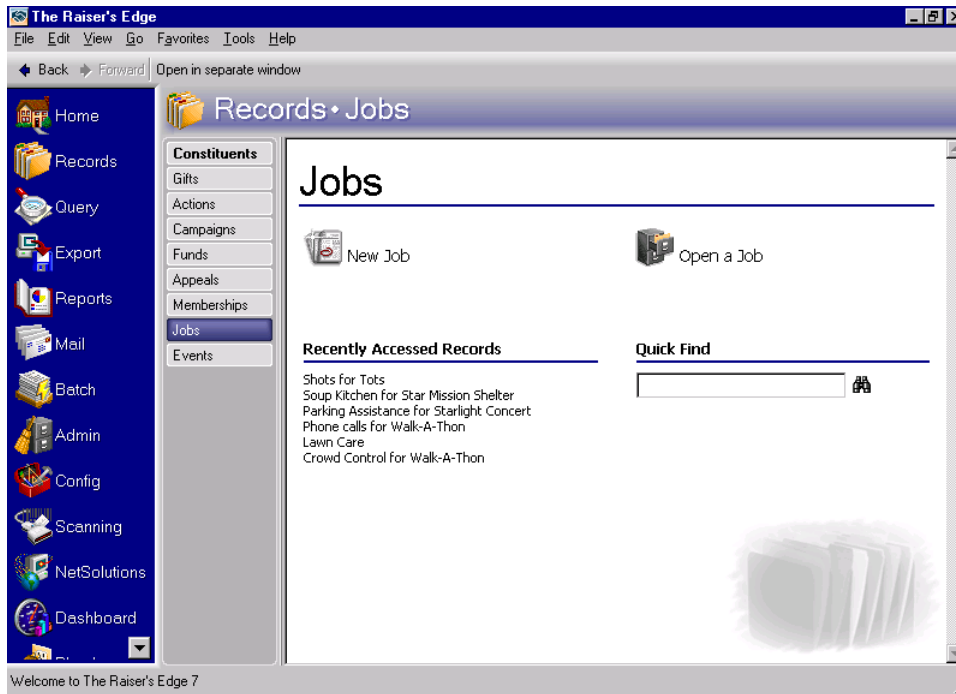
Tip: You can use shortcut keys to move around *The Raiser's Edge* without using your mouse. For example, press **CTRL + L** on your keyboard to save and close a record.

9. After you enter or edit the appropriate volunteer information, click **Save and Close** on the toolbar.

Accessing a Job Record

When we use the term “accessing” a job record, we are mainly talking about opening an existing record. Every job you enter into your database has a separate job record. Once you add a job record to the database, you can open the record from the shell **File** menu, from the **File** menu of an existing job record, and from the Jobs page of *Records*. We recommend opening records from *Records* because it allows the easiest and most complete access to all record types.

To access the Jobs page, click **Records** on the Raiser's Edge bar, then click the **Jobs** button.



Tip: You can also view recently accessed job records by selecting **File, Recently Accessed Jobs** from the menu bar of a job record.

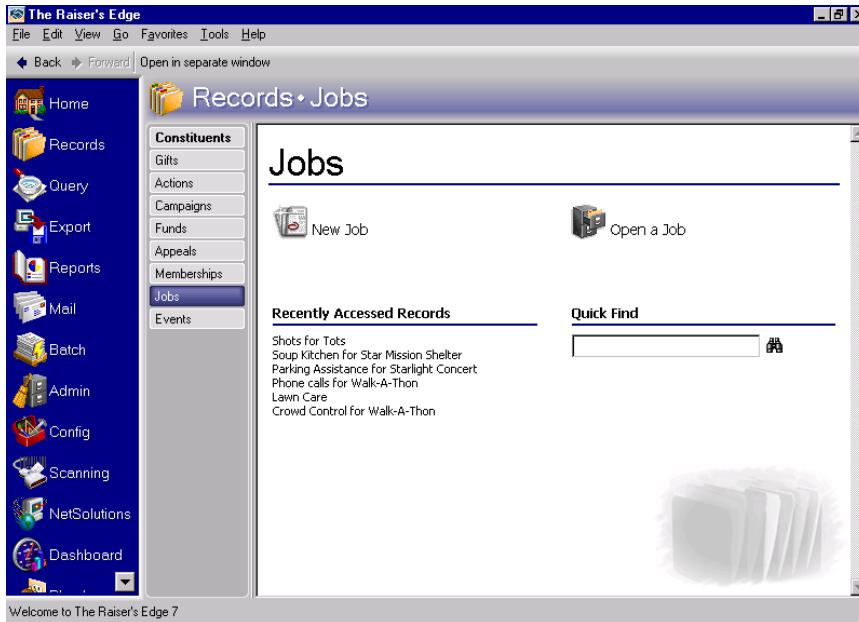
As you add or open job records, the names of these jobs appear on the Jobs page in a list of recently accessed records. You can open any job record in this list by clicking the job name. To quickly search for a job record, you can enter the job name in the **Quick Find** field and click the binoculars to display a list of jobs.

► Opening a job record from the Jobs page of Records

This procedure tells you how to quickly open, or access, a job record from the Jobs page of *Records*. For more information about adding a job record, see “Jobs” on page 81.

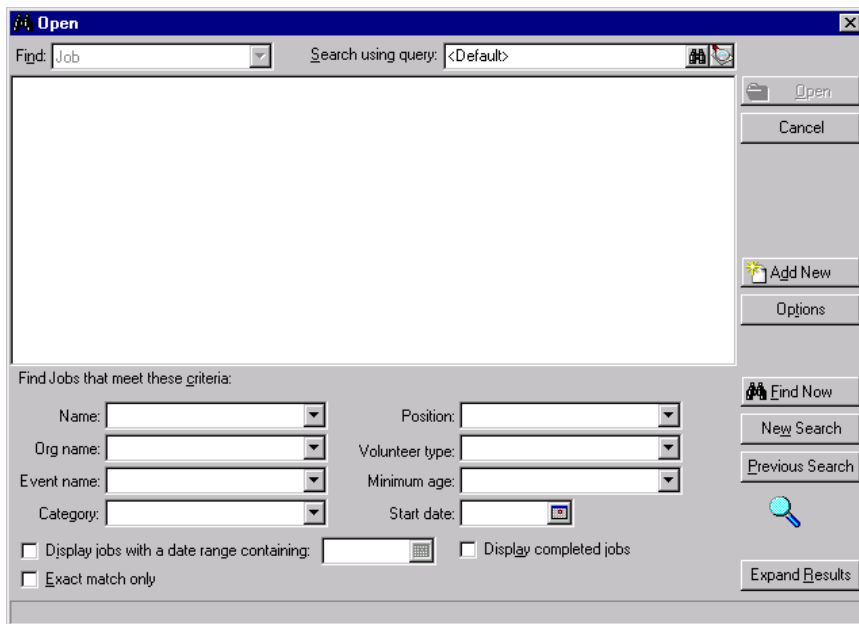
1. On the Raiser's Edge bar, click **Records**.

2. Click **Jobs**. The Jobs page appears.



Note: For complete details on all fields, checkboxes, and buttons on the Open screen, see the *Program Basics Guide*.

3. Click **Open a Job**. The Open screen for Jobs appears.



Warning: We recommend you search by one or two of the most helpful criteria types because the results that appear in the grid must match all criteria you enter. Adding too much criteria information in the **Find Jobs that meet these criteria** fields can actually prevent you from finding the job.

4. Under **Find Jobs that meet these criteria**, decide what criteria you want to use when searching for your job and enter the information in the appropriate criteria fields. The criteria you can use include the job name, organization name, event name, category, position, volunteer type, minimum age, and start date.

Find: Job Search using query: <Default>

Find Jobs that meet these criteria:

Name: Position:

Org name: Volunteer type:

Event name: Walk-A-Thon Minimum age:

Category: Day of Walk Start date:

Display jobs with a date range containing: Display completed jobs

Exact match only

Note: You can enter the first few letters or characters in the **Find Jobs that meet these criteria** fields if you do not know the correct spelling or number. For detailed information about how to use these fields, see the *Program Basics Guide*.

5. Click **Find Now**. If the search criteria you entered matches a job in the database, it lists in the grid on the Open screen. Depending on how limited or detailed your criteria are, the program may find one record or many records.

Job	Job Position	Category	Volunteer Type
Crowd Control	Monitor	Day of Walk	
Decorations	Design decorator	Day of Walk	
Refreshments	Canteen worker	Day of Walk	

Find Jobs that meet these criteria:

Name: Position:

Org name: Volunteer type:

Event name: Walk-A-Thon Minimum age:

Category: Day of Walk Start date:

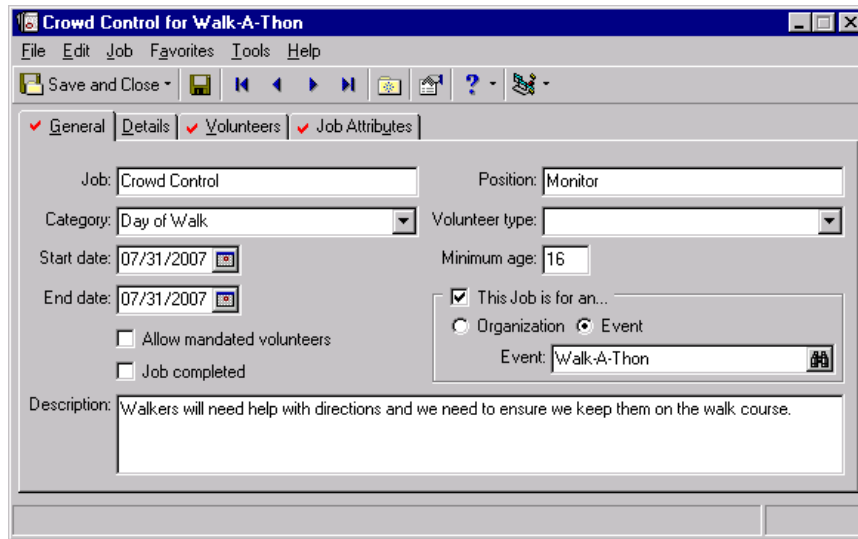
Display jobs with a date range containing: Display completed jobs

Exact match only

3 records found.

6. In the grid, select the job you want to open.

7. Click **Open**. The job record appears.



Tip: You can use shortcut keys to move around *The Raiser's Edge* without using your mouse. For example, press **CTRL + L** on your keyboard to save and close a record.

8. After you enter or edit the appropriate job information, click **Save and Close** on the toolbar.

Toolbars for Volunteers & Jobs

A toolbar is a row of buttons representing commands or functions for a record. You can use these buttons as alternatives to menu commands to save time during data entry. With *Volunteer Management*, you should be familiar with two toolbars. The first is the Volunteer tab toolbar, which is a constituent record toolbar. The second is the job record toolbar.

Volunteer Tab Toolbar

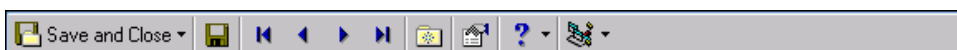
Note: You can set up a user option that enables you to view tooltips that explain the function of each toolbar command. Tooltips appear when you move your cursor across each item on the toolbar. For more information about setting up this user option, see the User Options chapter of the *Program Basics Guide*.

When you add or open a constituent record, a toolbar always appears on the record. Because the Volunteer tab is part of a constituent record, the constituent record toolbar is your Volunteer tab toolbar. This toolbar is located between the constituent record's menu bar and its tabs. It is designed to give you quick access to commands and functions you use most often.



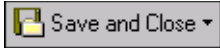
Job Record Toolbar

When you add or open a job record, a toolbar also always appears on that record. This toolbar is located between the job record's menu bar and its tabs. It is also designed to give you quick access to commands and functions you use most often.



Volunteer Tab and Job Record Toolbar Buttons

This is a list of toolbar buttons appearing on your volunteers' constituent records and your job records. Not all buttons appear on each record.



Save and close the record (**Save and New** can be accessed from the down arrow beside **Save and Close**. Use **Save and New** to save the record, close the saved record and open a new record.)



Save the record and keep the record open



Print labels, envelopes, a constituent profile, or an individual profile (constituent record only)



Preview labels, envelopes, a constituent profile, or an individual profile (constituent record only)



Create a letter from the constituent record (constituent record only)



Go to the first record



Go to the previous record



Go to the next record



Go to the last record



Go to records associated with this constituent record (constituent record only)



Open the relationship tree (constituent record only)



Add or open the annotation (constituent record only)



Add this record to your favorite list



Open the Properties screen



Validate, correct, and certify the constituent address. This toolbar button appears only if you have *AddressAccelerator*, our address correction data service. (constituent record only)



Access help from online help files, user guides, online support, or the Blackbaud Web site



Create and edit macros to create shortcuts for functions you perform repeatedly in *The Raiser's Edge*. This toolbar button is available only if you use the optional module *VBA for Advanced Customization*.



View the constituent record in Microsoft *Internet Explorer* in your custom view mode. (constituent record only)

For more information about menu bars and toolbars, see the *Program Basics Guide*.

User Options for the Volunteer Tab

User options are preferences you set that affect how *The Raiser's Edge* looks and runs on the workstation you are using. User options are login-specific, which means that if you log into any workstation using your password, your preferences are active on that workstation. When you log off that workstation, your preferences are not active for any other user. You can establish user options by selecting **Tools, User Options** from the menu bar on the shell of *The Raiser's Edge*. When the Options screen appears, select the Records tab.

The screenshot shows the 'Options' dialog box with the 'Records' tab selected. The dialog has a menu bar with 'Administration', 'Color', 'Printing', 'File Locations', and 'Membership Scanning'. Below that is a sub-menu bar with 'General', 'Home', 'Records', 'Query', 'Export', 'Reports', 'Mail', and 'Batch'. The main area contains a tree view on the left with categories like 'Individuals', 'Organizations', 'Gifts', etc. The 'Individuals' category is expanded. On the right, there are settings for 'Default tab' (set to 'Bio 1'), a list of tabs to check for data (with 'Volunteer' checked), a 'Constituent name format' dropdown (set to 'First name Last name'), and radio buttons for 'Show constituencies', 'Show memberships', and 'None' (selected). At the bottom are 'Reset to System Defaults', 'OK', 'Cancel', and 'Apply' buttons.

You can establish certain user options for the Volunteer tab by setting up user options for individual constituent records. Once you establish these individual constituent user options, your homework for the Volunteer tab is done. For example, you can decide what tab appears automatically when you add or open an individual constituent record. If you want the Volunteer tab to appear each time you open a constituent record, select it. You can select the tabs you want the program to check for data. On each selected tab, a red check mark appears so you know immediately if a tab contains any information. Therefore, if you select the Volunteer tab, a red check mark appears on that tab when you enter volunteer information.

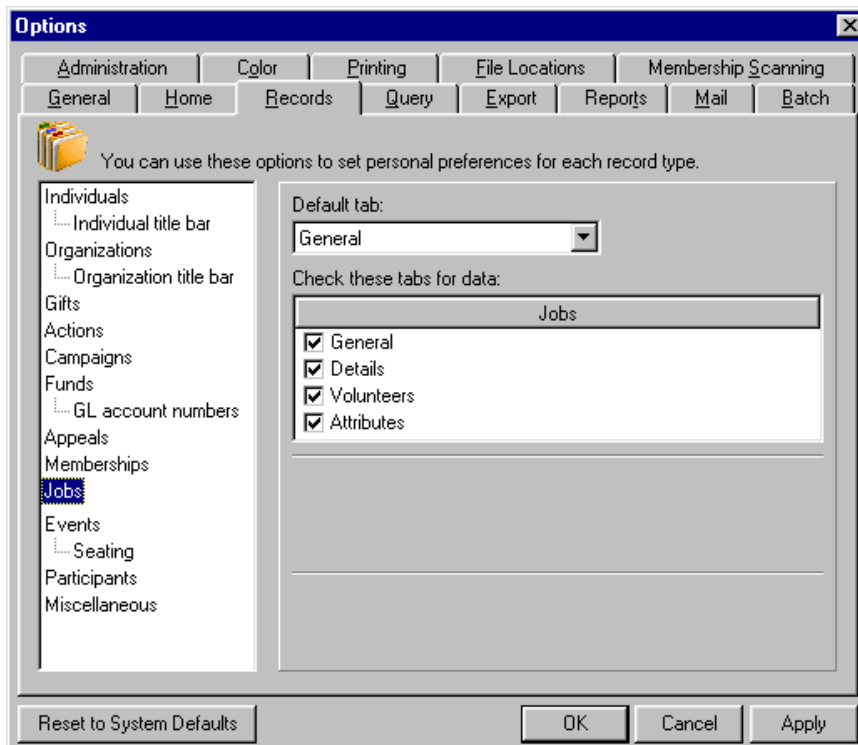
By setting up user options for individual constituent records, you can also decide how you want the individual constituent name to appear on the title bar of each constituent record and how you want the constituent name to appear on the title bar of other records. For detailed instructions on how to set up user options for individual constituent records, see the User Options chapter of the *Program Basics Guide*.

User Options for Job Records

Remember from the previous User Options for the Volunteer Tab section, user options are preferences you set that affect how *The Raiser's Edge* looks and runs on the workstation you are using. User options are login-specific, which means that if you log into any workstation using your password, your preferences are active on that workstation. When you log off that workstation, your preferences are not active for any other user. You can establish user options for your job records the same way you establish user options for the Volunteer tab. You first need to select **Tools, User Options** from the menu bar on the shell of *The Raiser's Edge*.

► Establishing user options for job records

1. From the menu bar on the shell of *The Raiser's Edge*, select **Tools, User Options**. The Options screen appears.



2. Select the Records tab.
3. From the tree view on the left, select **Jobs**. The job record selections appear on the right.
4. In the **Default tab** field, select the tab you want to appear automatically when you add or open a job record.

Tip: To save time, in the **Jobs** box, you can right-click and **Deselect All** or **Select All** the checkboxes.

5. In the **Jobs** box, mark the checkbox by the tabs you want the program to search for data. On your job records, a red check mark will appear on each selected tab when you add data.
6. Click **Apply** to apply and save your changes or click **OK** to save your changes and close the Options screen.

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Volunteer Records

A volunteer is a person who voluntarily undertakes a task, or a specialized piece of work, for an organization or event. Perhaps your organization is holding a walk-a-thon and several members of the community offer to hand out registration packets the morning before the race and another individual offers to take photos of the event for your newsletter. Perhaps your organization is sending out its annual membership mailing and a group of people involved with your organization offer to fold letters and stuff envelopes. The individuals who give their time to your organization, or your organization's events, and request no pay in return are volunteers.

In *The Raiser's Edge*, the first part of The optional module *Volunteer Management* involves entering information about your volunteers on the Volunteer tab of their constituent records. When you enter information on a Volunteer tab, the constituent becomes active in *The Raiser's Edge* as a volunteer for your organization.

The screenshot shows the 'Volunteer' tab interface. The 'Volunteer Types' table is as follows:

Type	Status	Start Date	End Date	Reason Finished
Lawn Maintenance	Active	03/16/2006		

The 'Emergency Contact' form contains the following information:

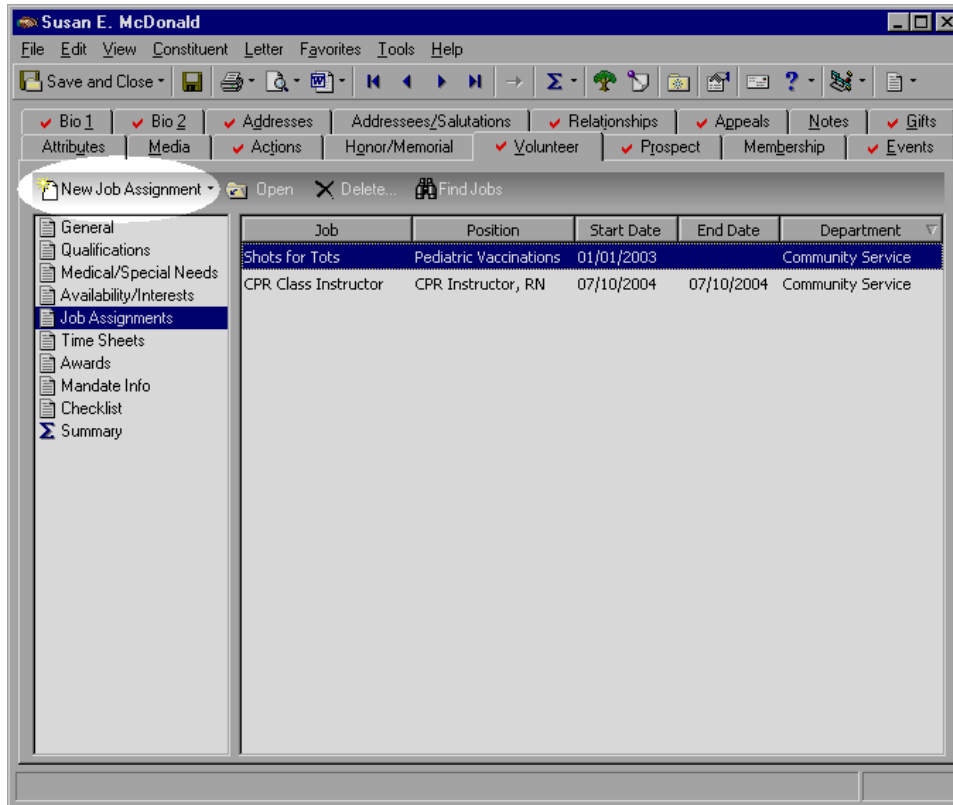
- Name: Margaret Murphy
- Relation: Wife
- Phone: 617-555-8814

The 'Vehicle Information' form contains the following information:

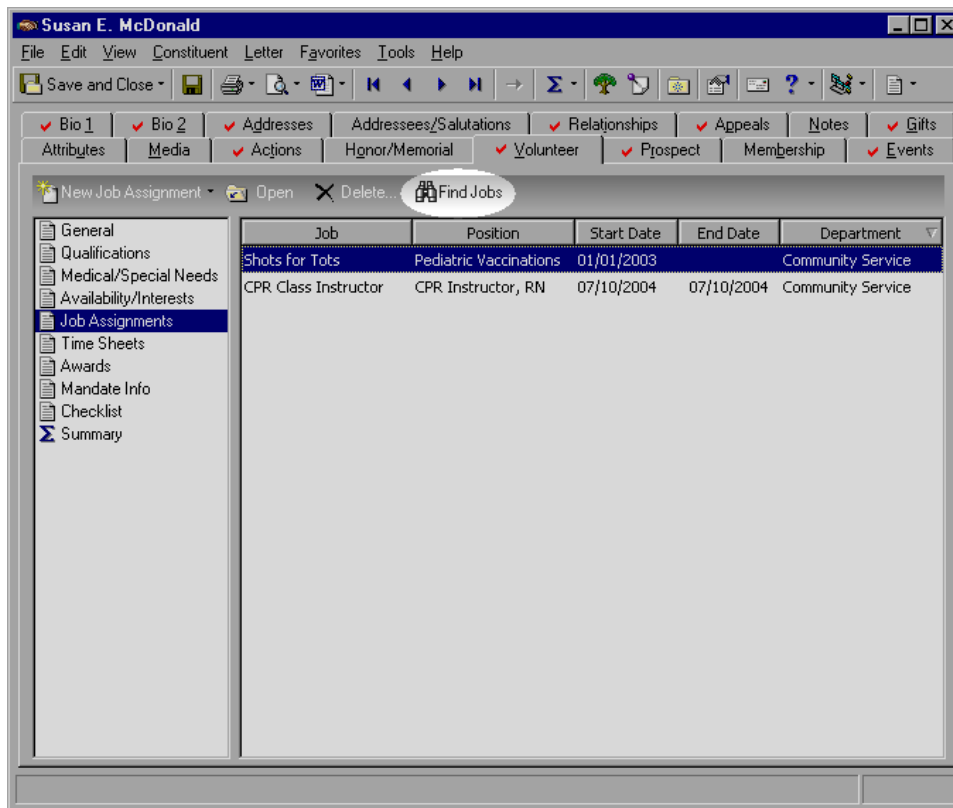
- Personal vehicle available for use
- Vehicle Type: Truck
- Comment: Can use truck for volunteer work

From a Volunteer tab, you can assign volunteer types, define qualifications a volunteer needs for certain jobs, keep track of your volunteer's medical information and other special needs, determine when a volunteer can work, and match his special interests with certain jobs. You can also create checklists of tasks a volunteer needs to complete before starting a job. You can track awards given to a volunteer by your organization, the amount of service needed to obtain these awards, and the next award a volunteer should receive if he completes the required amount of service. All this and much more is tracked on the Volunteer tab of a constituent record!

When you add information on the Volunteer tab of your volunteers' constituent records, keep in mind that you can assign each of these volunteers to jobs you create in your database. Once you add job records to your database, you can manually find a job and assign it to a volunteer by using the **New Job Assignment** button on the Volunteer tab of his constituent record.



You can automatically find jobs and assign them to a volunteer by using the **Find Jobs** button on the same tab.



If you plan on using the **Find Jobs** button to automatically find jobs and assign them to a volunteer, you should enter information on the Volunteer tab and your job records consistently. If information on the Volunteer tab does not match information on your job records, you can limit your ability to find jobs when using this button.

Manually finding a job and assigning it to a volunteer is discussed later in this chapter. Automatically finding jobs and assigning them to a volunteer by using the **Find Jobs** button is also discussed later in this chapter.

General Information on the Volunteer Tab

When you start tracking a constituent in your database as a volunteer, a good starting point is to enter general information on the Volunteer tab. General information encompasses volunteer types, the beginning and ending dates of a constituent's volunteer service, an emergency contact, and if the volunteer has a personal vehicle available for volunteer use.

The screenshot shows a software window titled "Mark D. Adamson" with a menu bar (File, Edit, View, Constituent, Letter, Favorites, Tools, Help) and a toolbar. Below the toolbar is a navigation bar with tabs for Bio 1, Bio 2, Addresses, Addressees/Salutations, Relationships, Appeals, Notes, Gifts, Attributes, Media, Actions, Honor/Memorial, Volunteer, Prospect, Membership, and Events. The "Volunteer" tab is selected. The main area is divided into a sidebar on the left with a tree view (General, Qualifications, Medical/Special Needs, Availability/Interests, Job Assignments, Time Sheets, Awards, Mandate Info, Checklist, Summary) and a main content area. The main content area has a "Volunteer Types" table and two form sections: "Emergency Contact" and "Vehicle Information".

Volunteer Types					
Type	Status	Start Date	End Date	Reason Finished	
Gift Shop Staff	Active	03/16/2006			
General	Active	01/01/2004			
Computer Operator	Active	01/01/2003			

Emergency Contact

Name: Mark D. Adamson, Jr.
 Relation: Father
 Phone: 843-555-6320

Vehicle Information

Personal vehicle available for use
 Vehicle Type: Car
 Comment: Will use car for volunteer work.

Volunteer Types and Statuses

Volunteer type denotes the capacity in which a volunteer can serve your organization. It denotes the kind of volunteer you need. For example, Ashley Ziegler, a volunteer with your organization, works in your medical clinic. You assign a **Type** of "Medical Staff" in the **Volunteer Types** grid on the Volunteer tab of her constituent record. A volunteer can be multiple types. For example if Ashley also starts volunteering in your business office, you can add another **Type** of "Business Office Staff" in the **Volunteer Types** grid.

Volunteer Types					
Type	Status	Start Date	End Date	Reason Finished	
Medical Staff	Active	04/08/2000	12/01/2008	Moved away	

Volunteer status denotes whether a volunteer is active or not. A volunteer can have different statuses for each type. For example, Shannon Thompson, a volunteer at your organization, is assigned two volunteer types: Gift Shop Staff and Business Office Staff. Shannon is currently working in the gift shop and has discontinued working in your business office. She worked in your business office regularly last year. In the **Volunteer Types** grid, you can assign the status of Active in the **Status** column on the same row as the Gift Shop Staff type and a status of Inactive on the same row as the Business Office Staff type.

In the **Volunteer Types** grid, you can enter a **Start Date** that indicates when the volunteer started volunteering as a particular type. You can also enter an **End Date** if the volunteer is no longer volunteering as a particular type. If a volunteer is no longer volunteering as a particular type, it can be helpful to enter a **Reason Finished**.

► **Adding volunteer type and status information on the Volunteer tab**

You can add volunteer type and status information for a constituent by selecting **General** from the list on the left of the Volunteer tab and entering information in the **Volunteer Types** grid on the right.

Scenario: Your historical society runs a gift shop where proceeds benefit your organization’s historical properties. Mark Adamson is an active volunteer in your gift shop. He started volunteering on September 4, 2002. Enter this information in the **Volunteer Types** grid on the Volunteer tab of Mark’s constituent record.

Note: You can delete a row from the **Volunteer Types** grid on the Volunteer tab. Select the row, and right-click. A submenu appears. Select **Delete row**. A message appears, asking if you are sure you want to delete the row. Click **Yes**. You can also insert a row by selecting **Insert row** from the submenu. The new row appears above the row you select.

1. From Mark Adamson’s constituent record, select the Volunteer tab. For information about opening a constituent record and accessing the Volunteer tab, see “Accessing the Volunteer tab of a constituent record” on page 8.

Warning: If you plan on using the **Find Jobs** button to automatically find jobs and assign them to a volunteer, we recommend you enter a **Volunteer type** on a job record only if a type is required by your organization. If a volunteer can be one of several types to perform a job, you can actually eliminate volunteers when using this button because the information becomes required criterion.

2. From the list on the left, select **General**. The **Volunteer Types** grid and **Emergency Contact** and **Vehicle Information** frames appear on the right.

The screenshot shows the constituent record for Mark D. Adamson. The Volunteer tab is selected, and the Volunteer Types grid is displayed. The grid has the following data:

Type	Status	Start Date	End Date	Reason Finished
General	Active	01/01/2003		
Computer Operator	Active	01/01/2003		
Gift Shop Staff	Active	03/16/2006		

Below the grid, the Emergency Contact and Vehicle Information frames are visible. The Emergency Contact frame shows:

Name: Mark D. Adamson, Jr.
 Relation: Father
 Phone: 843-555-6320

The Vehicle Information frame shows:

Personal vehicle available for use
 Vehicle Type: Car
 Comment: Will use car for volunteer work.

3. In the **Volunteer Types** grid, select “Gift Shop Staff” in the **Type** column. **Type** denotes the kind of volunteer needed by your organization.
4. On the same row, select “Active” in the **Status** column. **Status** denotes whether the volunteer is active or not. Mark is an active volunteer.

Note: The **Start Date** in the first row of the Volunteer Types grid denotes when the volunteer began service at your organization in general, as well as when he began service for this type of volunteer. The **End Date** and **Reason Finished** columns in the first row of the Volunteer Types grid work the same way.

5. On the same row, enter the date 03/16/2006 in the **Start Date** column. **Start Date** denotes when Mark began service as a volunteer with the Gift Shop Staff.
Because a volunteer can have a different begin and end date for each type, overlapping dates can appear in the grid.
6. Leave the **End Date** and **Reason Finished** columns blank because Mark is presently working at the gift shop.
If a volunteer is no longer serving your organization, you can enter an **End Date** and a **Reason Finished**.
7. To save the type and status information and close Mark’s constituent record, click **Save and Close** on the toolbar.

Emergency Contact Information

When a volunteer starts working at your organization, it is a good idea to track the name and phone number of someone to contact in case of an emergency. You can also notate how the contact is related to the volunteer.

The screenshot shows a form titled "Emergency Contact" with the following fields:

- Name: Mary Ann Adamson
- Relation: Sister (selected from a dropdown menu)
- Phone: 843-555-7070

▶ Adding emergency contact information

You can add emergency contact information for a volunteer by selecting **General** from the list on the left of the Volunteer tab and entering information in the fields of the **Emergency Contact** frame on the right.

Scenario: Your historical society runs a gift shop where proceeds benefit your organization’s historical properties. Mark Adamson is an active volunteer in your gift shop. It is required you track an emergency contact for every volunteer. Enter this information in the **Emergency Contact** frame on the Volunteer tab of Mark’s constituent record.

1. From Mark Adamson’s constituent record, select the Volunteer tab. For information about opening a constituent record and accessing the Volunteer tab, see “Accessing the Volunteer tab of a constituent record” on page 8.

- From the list on the left, select **General**. The **Volunteer Types** grid and **Emergency Contact** and **Vehicle Information** frames appear on the right.

The screenshot shows a software window titled "Mark D. Adamson" with a menu bar (File, Edit, View, Constituent, Letter, Favorites, Tools, Help) and a toolbar. Below the toolbar is a navigation bar with buttons for "Add New", "Open", "Delete...", and "Find Jobs". A sidebar on the left lists various tabs, with "General" selected. The main area displays a "Volunteer Types" grid with the following data:

Type	Status	Start Date	End Date	Reason Finished
Gift Shop Staff	Active	03/16/2006		
General	Active	01/01/2004		
Computer Operator	Active	01/01/2003		

At the bottom right, there are two frames: "Emergency Contact" and "Vehicle Information".

Emergency Contact

Name: Mark D. Adamson, Jr.
 Relation: Father
 Phone: 843-555-6320

Vehicle Information

Personal vehicle available for use
 Vehicle Type: Car
 Comment: Will use car for volunteer work.

- In the **Emergency Contact** frame, enter "Mark D. Adamson, Jr." in the **Name** field.
- In the **Relation** field, select "Father".
- In the **Phone** field, enter the phone number 843-555-6320.
- To save the emergency contact information and close Mark's constituent record, click **Save and Close** on the toolbar.

Vehicle Information

It can be important for an organization to track volunteers who have vehicles available for volunteer use. Perhaps your organization delivers meals to elderly people in your community. A volunteer needs a vehicle to perform this service. Perhaps the volunteers of your organization provide companionship and services to community members who have less than a year to live. This service takes place in a patient's home. The volunteers who perform these services need a vehicle to travel to and from the patients' homes. On the Volunteer tab, you can track if a volunteer has a vehicle available for use, the vehicle type, and any comments you have concerning the situation.

Vehicle Information

Personal vehicle available for use

Vehicle Type: Car

Comment: Will use car for volunteer

▶ Adding vehicle information

You can add vehicle information for a volunteer by selecting **General** from the list on the left of the Volunteer tab and entering information in the fields of the **Vehicle Information** frame on the right.

Scenario: Your historical society runs a gift shop where proceeds benefit your organization’s historical properties. Around holidays, you receive many requests to have gifts delivered. Mark Adamson, an active volunteer in your gift shop, lets you know he is willing to use his personal vehicle to make deliveries. Enter this information in the **Vehicle Information** frame on the Volunteer tab of Mark’s constituent record.

1. From Mark Adamson’s constituent record, select the Volunteer tab. For information about opening a constituent record and accessing the Volunteer tab, see “Accessing the Volunteer tab of a constituent record” on page 8.
2. From the list on the left, select **General**. The **Volunteer Types** grid and **Emergency Contact** and **Vehicle Information** frames appear on the right.

The screenshot shows a software interface for a constituent record titled "Mark D. Adamson". The interface includes a menu bar (File, Edit, View, Constituent, Letter, Favorites, Tools, Help) and a toolbar with various icons. Below the menu bar is a row of tabs: Bio 1, Bio 2, Addresses, Addressees/Salutations, Relationships, Appeals, Notes, Gifts, Attributes, Media, Actions, Honor/Memorial, Volunteer, Prospect, Membership, and Events. The "Volunteer" tab is selected. On the left side, there is a tree view with "General" selected. The main area displays a "Volunteer Types" table with columns: Type, Status, Start Date, End Date, and Reason Finished. Below the table are two frames: "Emergency Contact" and "Vehicle Information".

Type	Status	Start Date	End Date	Reason Finished
Gift Shop Staff	Active	03/16/2006		
General	Active	01/01/2004		
Computer Operator	Active	01/01/2003		

Emergency Contact

Name: Mark D. Adamson, Jr.
 Relation: Father
 Phone: 843-555-6320

Vehicle Information

Personal vehicle available for use
 Vehicle Type: Car
 Comment: Will use car for volunteer work.

3. In the **Vehicle Information** frame, mark the **Personal vehicle available for use** checkbox because Mark lets you know he is willing to use his own truck for volunteer work.
4. In the **Vehicle Type** field, select “Car”. This is the type of vehicle Mark owns.
5. In the **Comment** field, enter “Will use car for volunteer work.” You may decide to track information like the vehicle model, make, or license plate number.
6. To save the vehicle information and close Mark’s constituent record, click **Save and Close** on the toolbar.

Qualifications on the Volunteer Tab

Qualifications are the skills, experience, courses, and training a volunteer must have to qualify, or be accepted, as a volunteer for the jobs at your organization.

The screenshot shows a software window titled "Harris F. Sadler" with a menu bar (File, Edit, View, Constituent, Letter, Favorites, Tools, Help) and a toolbar. Below the toolbar are several tabs: Bio 1, Bio 2, Addresses, Addressees/Salutations, Relationships, Appeals, Notes, Gifts, Attributes, Media, Actions, Honor/Memorial, Volunteer, Prospect, Membership, and Events. The "Volunteer" tab is selected. On the left is a navigation pane with a tree view containing: General, Qualifications (selected), Medical/Special Needs, Availability/Interests, Job Assignments, Time Sheets, Awards, Mandate Info, Checklist, and Summary. The main area contains two tables:

Skills and Experience						
Description	Skill Level	License Type	License No.	Expires	Comments	
Carpenter	Licensed	SC	G14579	03/16/2008	Harris was referre...	

Courses and Training						
Course Name	Start Date	End Date	Instructor	Certification	Expires	Commer
Historic Preservation	03/16/2004	05/16/2004	Mr. Freeman	Tour guide	03/16/2009	Harris is que

Note: If you use the **Find Jobs** button to automatically find jobs and assign them to a volunteer, the volunteer potentially qualifies for jobs that match his skills, experience, courses, and training.

For example, your humanitarian organization sponsors a program where you build homes for families in need. To accomplish your mission, you need a lot of volunteers with a lot of different skills. Some of the volunteer skills you are looking for are carpentry, plumbing, roofing, and painting skills. If a volunteer has any of these skills, you should track them in the **Skills and Experience** grid on the Volunteer tab of the volunteer's constituent record.

Perhaps your humanitarian organization is going to foreign countries to accomplish the same mission. Before your volunteers travel to any foreign country, you require they take several courses to learn about the environment and culture in which they will work. On the Volunteer tab, you can track the required courses and the dates your volunteers took the courses in the **Courses and Training** grid on the Volunteer tab of the volunteer's constituent record.

Skills and Experience on the Volunteer Tab

On the Volunteer tab, you can track a volunteer's skills and experience in the **Skills and Experience** grid. In this grid, you should enter a **Description**. Perhaps you have volunteers who are medical professionals and have specialized training. Perhaps you have volunteers who have photography, editing, computer networking, or data entry skills. If you are holding a CPR class, you need professionals with lifesaving skills. If you are teaching classes in an ethnic community, you may need volunteers with foreign language skills.

Skills and Experience						
Description	Skill Level	License Type	License No.	Expires	Comments	
Carpenter	Licensed	SC	G14578	04/08/2008	Mark does beau...	

After you enter a **Description**, you should enter a **Skill Level**. Skill levels can range from expert, professional, and highly skilled to minimally skilled. If you are tracking experience such as medical training, you may need to track a **License Type**. For example, license types can include RN or LPN if you are tracking a license type for a nurse. If you track a **License Type**, there is a column for the **License No.** and another to track when the license **Expires**. Like many grids in *The Raiser's Edge*, a **Comments** column exists. You can enter things you want to remember about the volunteer or his skills and experience.

▶ Adding skills and experience on the Volunteer tab

Note: From *Reports*, you can run a Volunteer Skills and Experiences report that lists your volunteers with a description of their skill and experiences, skill level, and license information. For more information, see the *Reports Guide*.

You can add a volunteer's skills and experience by selecting **Qualifications** from the list on the left of the Volunteer tab and entering information in the **Skills and Experience** grid on the right.

Scenario: Your health organization is offering free blood pressure screenings to the community. Because this is such a beneficial community service, Mark Adamson, a registered nurse, has volunteered to take blood pressures at the screening. On the Volunteer tab of Mark's constituent record, track his skills and experience that are beneficial to your organization.

1. From Mark Adamson's constituent record, select the Volunteer tab. For information about opening a constituent record and accessing the Volunteer tab, see "Accessing the Volunteer tab of a constituent record" on page 8.

Note: You can delete a row from the **Skills and Experience** grid on the Volunteer tab. Select the row, and right-click. A submenu appears. Select **Delete row**. A message appears, asking if you are sure you want to delete the row. Click **Yes**. You can also insert a row by selecting **Insert row** from the submenu. The new row appears above the row you select.

2. From the list on the left, select **Qualifications**. The **Skills and Experience** and **Courses and Training** grids appear on the right.

The screenshot shows a software window titled "Mark D. Adamson" with a menu bar (File, Edit, View, Constituent, Letter, Favorites, Tools, Help) and a toolbar. Below the toolbar are several tabs: Bio 1, Bio 2, Addresses, Addressees/Salutations, Relationships, Appeals, Notes, Gifts, Attributes, Media, Actions, Honor/Memorial, Volunteer, Prospect, Membership, and Events. The left sidebar contains a tree view with "Qualifications" selected. The main area displays two tables:

Skills and Experience						
Description	Skill Level	License Type	License No.	Expires	Comments	
Medical Professional	Nurse	RN	SC4092A		10 years service ...	

Courses and Training						
Course Name	Start Date	End Date	Instructor	Certification	Expires	Comments
CPR	03/16/2005	09/16/2...	Dr. Kaplan	CPR Instructor	09/16/2006	One year license

Note: If an entry does not exist in a drop-down list in a field where you must make a selection, you can always type your entry directly into the field if you have security rights established. A message appears, asking if you want to add the entry to that table. Select **Yes**. Even though you can add a table entry from a field with a drop-down list, for data entry consistency, we recommend you establish your table entries from the **Tables** link of *Configuration*. For information about setting up tables, see the *Configuration & Security Guide*.

- To identify Mark's skills, in the **Skills and Experience** grid, select "Medical Professional" in the **Description** column.
- To quantify the skill, select "Nurse" in the **Skill Level** column of the same row. Mark is a nurse in the medical profession.
- In the same row, select "RN" in the **License Type** column.
- In the **License No.** column, enter "SC4092A".
- Because Mark's nursing license does not expire as long as he is practicing, leave the **Expires** column of the same row blank.
- In the **Comments** column of the same row, enter "10 years service as a medical professional".
- To save the information and close Mark's constituent record, click **Save and Close** on the toolbar.

Courses and Training on the Volunteer Tab

On the Volunteer tab, you can track a volunteer's courses and training in the **Courses and Training** grid. In this grid, you should enter a **Course Name**. Perhaps you need to track that a volunteer took your Volunteer Orientation, Health and Sanitation, or First Aid class. Or, you may need to track that a volunteer took a CPR, Advanced Lifesaving, or Local History course. You can enter the **Start Date** and **End Date** of the class or course and the **Instructor** who taught it. If a **Certification** was earned, you can enter the name, the date the certification **Expires**, and any **Comments** you have concerning the volunteer, class, or course.

Courses and Training						
	Course Name	Start Date	End Date	Instructor	Certification	Expires
	Advanced Lifesaving	06/05/2005	06/09/2005	Max Horn	Lifeguard	06/09/2009

▶ Adding courses and training on the Volunteer tab

Note: From *Reports*, you can run a Courses and Training Report that lists your volunteers by courses and training, with the date the volunteer enrolled, the instructor, and the certificate information. For more information, see the *Reports Guide*.

You can add courses and trainings a volunteer has undertaken by selecting **Qualifications** from the list on the left of the Volunteer tab and entering information in the **Courses and Training** grid on the right.

Scenario: Your health organization is offering free blood pressure screenings to the community. Because this is such a beneficial community service, Mark Adamson, a registered nurse, has volunteered to take blood pressures at the screening. On the Volunteer tab of Mark's constituent record, track the courses and training he has undertaken that are beneficial to your organization.

1. From Mark Adamson's constituent record, select the Volunteer tab. For information about opening a constituent record and accessing the Volunteer tab, see "Accessing the Volunteer tab of a constituent record" on page 8.

Note: You can delete a row from the **Courses and Training** grid on the Volunteer tab. Select the row, and right-click. A submenu appears. Select **Delete row**. A message appears, asking if you are sure you want to delete the row. Click **Yes**. You can also insert a row by selecting **Insert row** from the submenu. The new row appears above the row you select.

2. From the list on the left, select **Qualifications**. The **Skills and Experience** and **Courses and Training** grids appear on the right.

The screenshot shows a software window titled "Mark D. Adamson" with a menu bar (File, Edit, View, Constituent, Letter, Favorites, Tools, Help) and a toolbar. Below the toolbar is a navigation bar with tabs: Bio 1, Bio 2, Addresses, Addressees/Salutations, Relationships, Appeals, Notes, Gifts, Attributes, Media, Actions, Honor/Memorial, Volunteer, Prospect, Membership, Events. The main content area has a left sidebar with a tree view containing: General, **Qualifications**, Medical/Special Needs, Availability/Interests, Job Assignments, Time Sheets, Awards, Mandate Info, Checklist, and Summary. The main area displays two tables:

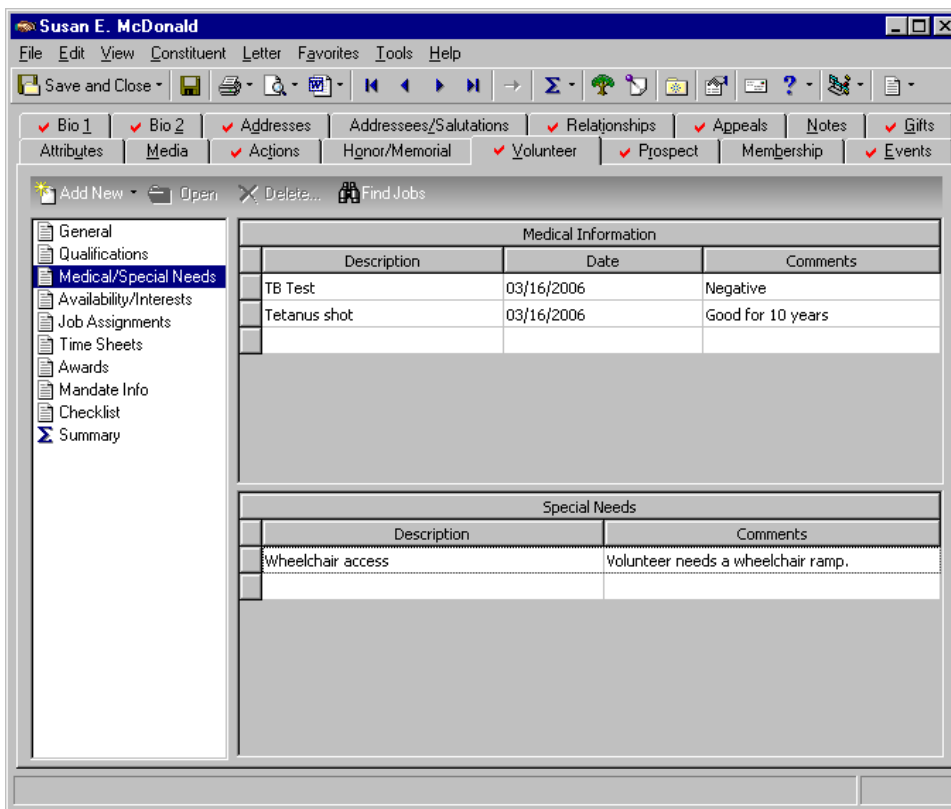
Skills and Experience					
Description	Skill Level	License Type	License No.	Expires	Comments
Medical Professional	Nurse	RN	SC4092A		10 years service ...

Courses and Training						
Course Name	Start Date	End Date	Instructor	Certification	Expires	Comments
CPR	03/16/2005	09/16/2005	Dr. Kaplan	CPR Instructor	09/16/2006	One year license

3. In the **Courses and Training** grid, select "CPR" in the **Course Name** column.
4. In the **Start Date** column of the same row, enter the date 03/16/2005.
5. In the **End Date** column of the same row, enter the date 09/16/2005. The course was spread out of six months.
6. In the **Instructor** column of the same row, enter "Dr. Kaplan".
7. In the **Certification** column of the same row, select "CPR Instructor". This is the certification the volunteer earned after completing the class.
8. In the **Expires** column of the same row, enter the date 09/16/2006. This is the date the certification expires and must be renewed.
9. In the **Comments** column of the same row, enter "One year license".
10. To save the information and close Mark's constituent record, click **Save and Close** on the toolbar.

Medical Information and Special Needs on the Volunteer Tab

You can easily track medical information for a volunteer on the Volunteer tab. Perhaps you have a volunteer who has a medical condition that is imperative for you to know about. Perhaps your organization requires a volunteer to have a TB test and a tetanus shot before he can work with your organization. You can track the names of the immunization and test, the date the immunization and test were administered, and any comments you have concerning either procedure.



Note: If you use the **Find Jobs** button to automatically find jobs and assign them to a volunteer, the volunteer potentially qualifies for jobs that match her medical information and special needs.

On the Volunteer tab, you can also track a volunteer's special needs. For example, Susan McDonald, a volunteer with your organization, has disabilities and needs wheelchair access. This type of information is beneficial for you and your volunteer because it helps you schedule Susan's work appropriately.

Medical Information on the Volunteer Tab

On the Volunteer tab, you can track a volunteer's medical information in the **Medical Information** grid. In this grid, you should enter a **Description**. Perhaps your organization requires a volunteer to have a physical examination, a TB test, or tetanus shot before she can start volunteering at your organization. If your volunteers are going to foreign countries to work, perhaps they need additional vaccinations or medical procedures. After you enter a **Description**, you can enter the **Date** the medical procedure took place and any **Comments** concerning the procedure or the volunteer.

Medical Information			
	Description	Date	Comments
	TB Test	03/22/2006	Negative
	Tetanus shot	03/22/2006	Good for 10 years without injury

▶ Adding medical information on the Volunteer tab

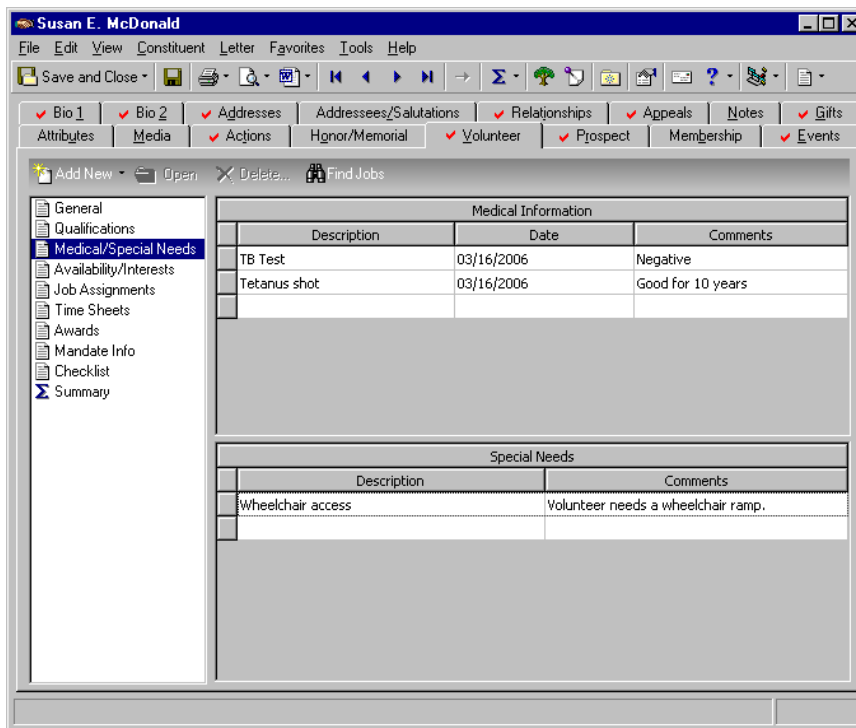
You can add a volunteer's medical information by selecting **Medical/Special Needs** from the list on the left of the Volunteer tab and entering information in the **Medical Information** grid on the right.

Scenario: Your organization runs a community center. You have volunteers who come in during the week to assist with office work. Before volunteers can initially start work at the center, you require they have a TB test and a tetanus shot. Susan McDonald is slated to start volunteering in the office next month. You mailed her a checklist of requirements to complete beforehand. Susan just faxed you proof of both the immunization and the TB test. Track the name of each and the dates they were given on the Volunteer tab of Susan's constituent record.

1. From Susan McDonald's constituent record, select the Volunteer tab. For information about opening a constituent record and accessing the Volunteer tab, see "Accessing the Volunteer tab of a constituent record" on page 8.

Note: You can delete a row from the **Medical Information** grid on the Volunteer tab. Select the row, and right-click. A submenu appears. Select **Delete row**. A message appears, asking if you are sure you want to delete the row. Click **Yes**. You can also insert a row by selecting **Insert row** from the submenu. The new row appears above the row you select.

- From the list on the left, select **Medical/Special Needs**. The **Medical Information** and **Special Needs** grids appear on the right.



- In the **Medical Information** grid, select “TB test” in the **Description** column.
- In the **Date** column, on the same row, enter the date 03/16/2006.
- In the **Comments** column, on the same row, enter “Negative”.
- In the next row of the **Medical Information** grid, select “Tetanus shot” in the **Description** column.
- In the **Date** column, on the same row, enter the date 03/16/2006.
- In the **Comments** column, on the same row, enter “Good for 10 years”.
- To save the medical information and close Susan’s constituent record, click **Save and Close** on the toolbar.

Special Needs on the Volunteer Tab

On the Volunteer tab, you can track a volunteer’s special needs in the **Special Needs** grid. In this grid, you should enter a **Description**. Perhaps certain volunteers need a baby-sitting service before they can volunteer with your organization. Perhaps you have a blind volunteer who needs her reading materials in Braille, a deaf volunteer who requires sign language as his main source of communication, or a volunteer who needs her instructions in another language. After you enter a **Description**, you can enter additional **Comments**. This information helps you schedule your volunteers appropriately.

Special Needs	
Description	Comments
Baby-sitting service	Always needs a baby-sitting service.

► **Adding special needs on the Volunteer tab**

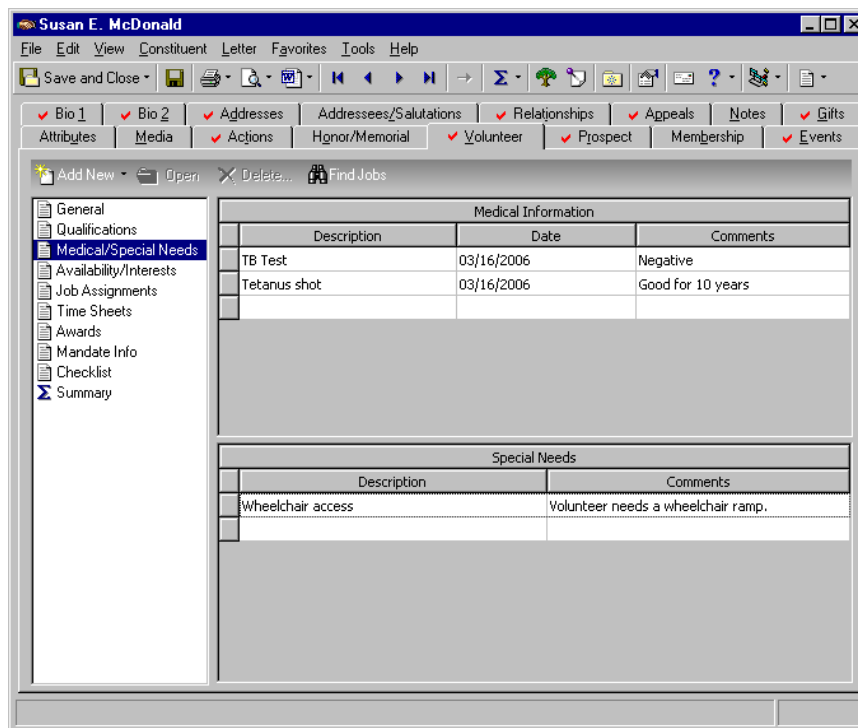
You can add a volunteer's special needs by selecting **Medical/Special Needs** from the list on the left of the Volunteer tab and entering information in the **Special Needs** grid on the right.

Scenario: Your organization is a small museum and you have volunteers who come in during the week to assist with office work. Susan McDonald, a new volunteer, has disabilities and needs wheelchair access. Track Susan's special needs on the Volunteer tab of her constituent record.

1. From Susan McDonald's constituent record, select the Volunteer tab. For information about opening a constituent record and accessing the Volunteer tab, see "Accessing the Volunteer tab of a constituent record" on page 8.

Note: You can delete a row from the **Special Needs** grid on the Volunteer tab. Select the row, and right-click. A submenu appears. Select **Delete row**. A message appears, asking if you are sure you want to delete the row. Click **Yes**. You can also insert a row by selecting **Insert row** from the submenu. The new row appears above the row you select.

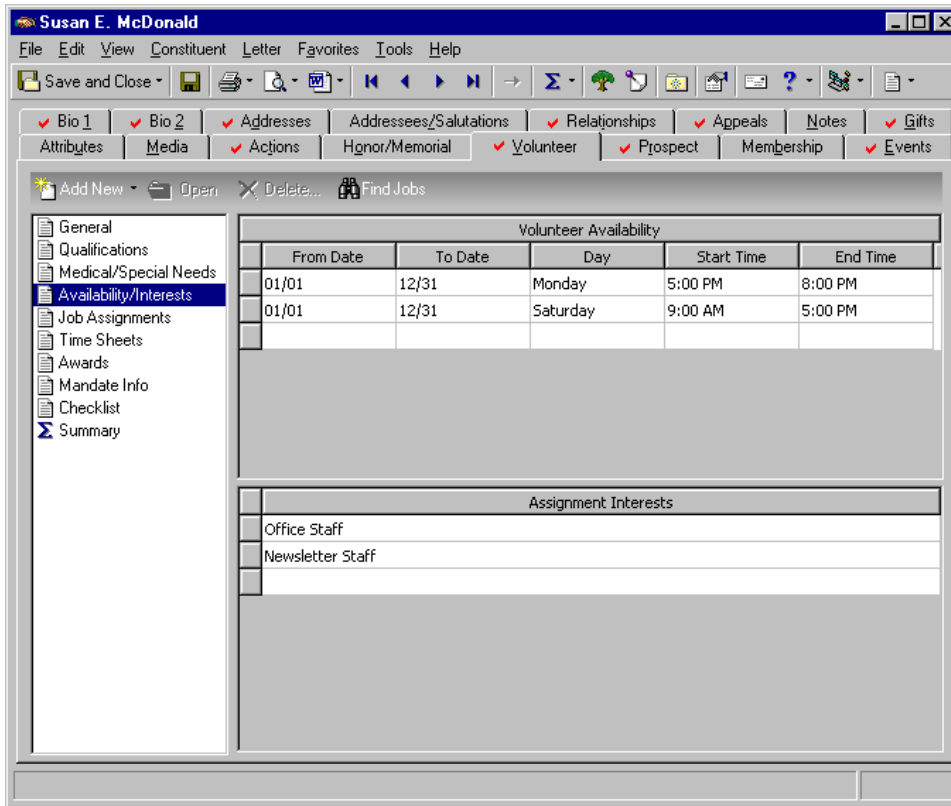
2. From the list on the left, select **Medical/Special Needs**. The **Medical Information** and **Special Needs** grids appear on the right.



3. In the **Special Needs** grid, select "Wheelchair access" in the **Description** column.
4. In the **Comments** column, on the same row, enter "Volunteer needs a wheelchair ramp."
5. To save the special needs information and to close Susan's constituent record, click **Save and Close** on the toolbar.

Availability and Interests on the Volunteer Tab

To organize your volunteer program effectively, it is imperative to know the dates, days, and times each volunteer is available to work. It is also helpful to know each volunteer's particular interests so you can assign them to enjoyable tasks. You can track volunteer availability and interests on the Volunteer tab of a constituent record.



For example, your organization runs an animal shelter. Dianne Daniels, a volunteer at the shelter, lets you know she can work every Saturday this year, from noon until 4:00 p.m. She also lets you know she is interested in either walking dogs or greeting guests and taking them back to see the animals. On the Volunteer tab, you can track both Dianne's availability and her particular assignment interests.

Volunteer Availability

On the Volunteer tab, you can track a volunteer's availability to work in the **Volunteer Availability** grid. In this grid, you should enter a **From Date** and a **To Date**. A year is not required in the date fields because a volunteer may work the same dates year after year. You can enter the **Day** a volunteer is available to work and also a **Start Time** and an **End Time**. For example, Gigi Legare, a student, volunteers every year as a lifeguard at your summer camp. She lets you know she is available to work at camp every Saturday, from 9:00 a.m. until 5:00 p.m. this summer.

Volunteer Availability					
	From Date	To Date	Day	Start Time	End Time
	06/01	08/31	Saturday	9:00 AM	5:00 PM

If a volunteer is only available once, you must enter the same date in both the **From Date** and **To Date** columns. Perhaps you have a professional athlete who is coming one afternoon to give a drug prevention talk to the children who are attending your summer camp. Enter the date she is coming in both fields.

► **Adding volunteer availability on the Volunteer tab**

You can add volunteer availability by selecting **Availability/Interests** from the list on the left of the Volunteer tab and entering information in the **Volunteer Availability** grid on the right.

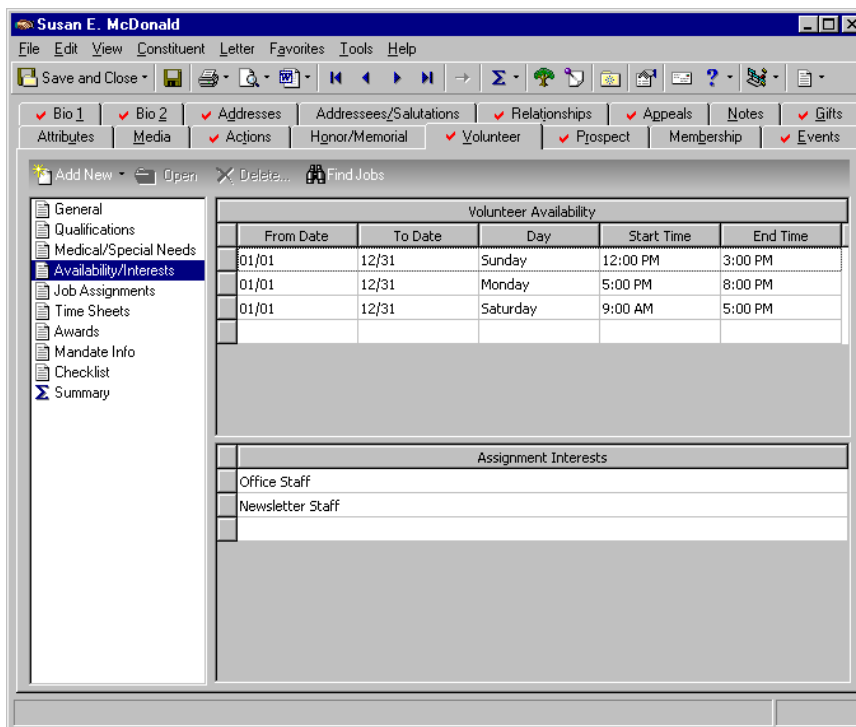
Scenario: Susan McDonald volunteers her services to your organization. She lets you know she can work every Sunday afternoon, from noon until 3:00 p.m., all year. You need to track Susan’s availability on the Volunteer tab of her constituent record.

Note: If you use the **Find Jobs** button to automatically find jobs and assign them to a volunteer, the volunteer potentially qualifies for jobs having a start and end date that falls within the volunteer’s start and end date.

1. From Susan McDonald’s constituent record, select the Volunteer tab. For information about opening a constituent record and accessing the Volunteer tab, see “Accessing the Volunteer tab of a constituent record” on page 8.

Note: You can delete a row from the **Volunteer Availability** grid on the Volunteer tab. Select the row, and right-click. A submenu appears. Select **Delete row**. A message appears, asking if you are sure you want to delete the row. Click **Yes**. You can also insert a row by selecting **Insert row** from the submenu. The new row appears above the row you select.

2. From the list on the left, select **Availability/Interests**. The **Volunteer Availability** and **Assignment Interests** grids appear on the right.



3. In the **Volunteer Availability** grid, enter the date 01/01 in the **From Date** column and 12/31 in the **To Date** column. Susan is available to work all year.

4. In the **Day** column of the same row, select “Sunday”.

5. In the **Start Time** column of the same row, enter “12:00 PM”, and in the **End Time** column, enter “3:00 PM”.
6. To save the availability information and to close Susan’s constituent record, click **Save and Close** on the toolbar.

Assignment Interests

On the Volunteer tab, you can track a volunteer’s assignment interests in the **Assignment Interests** grid. In this grid, on separate rows, you should enter each interest a volunteer has. For example, Rebecca Mitchell, a student who volunteers annually at your summer camp, lets you know she is interested in volunteering as a camp counselor and she wants only to work with children. You should enter each of these interests separately.

Assignment Interests	
	Camp Counselor
	Children/Youth

Note: If you use the **Find Jobs** button to automatically find jobs and assign them to a volunteer, the volunteer potentially qualifies for jobs that match his assignment interests.

▶ Adding assignment interests on the Volunteer tab

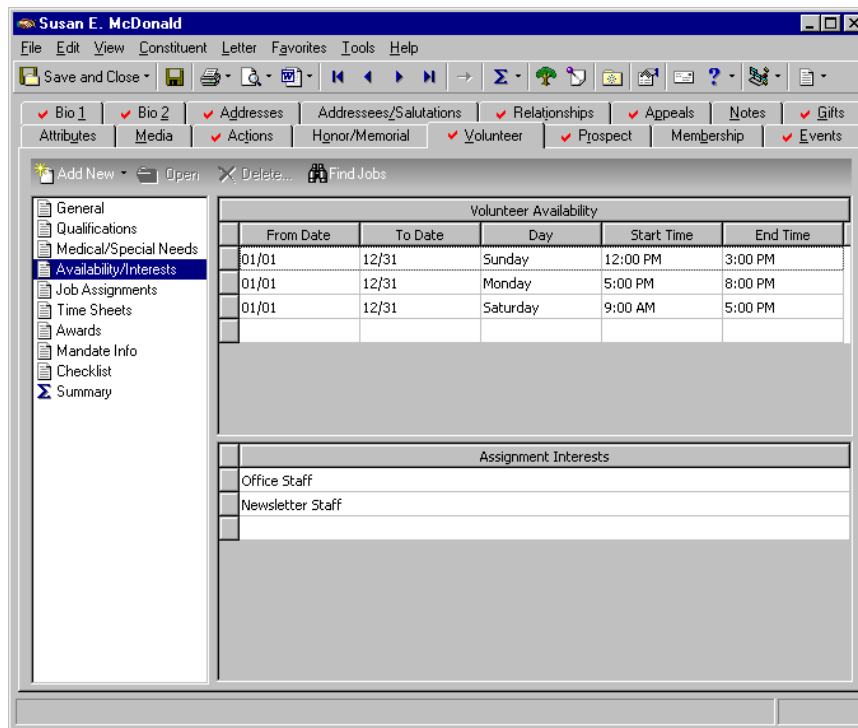
You can add volunteer assignment interests by selecting **Availability/Interests** from the list on the left of the Volunteer tab and entering information in the **Assignment Interests** grid on the right.

Scenario: Susan McDonald volunteers her services to your organization. She expresses an interest in working with the Office Staff and the Newsletter Staff. Track this information so you can assign Susan to tasks she enjoys.

Note: You can delete a row from the **Assignment Interests** grid on the Volunteer tab. Select the row, and right-click. A submenu appears. Select **Delete row**. A message appears, asking if you are sure you want to delete the row. Click **Yes**. You can also insert a row by selecting **Insert row** from the submenu. The new row appears above the row you select.

1. From Susan McDonald’s constituent record, select the Volunteer tab. For information about opening a constituent record and accessing the Volunteer tab, see “Accessing the Volunteer tab of a constituent record” on page 8.

- From the list on the left, select **Availability/Interests**. The **Volunteer Availability** and **Assignment Interests** grids appear on the right.

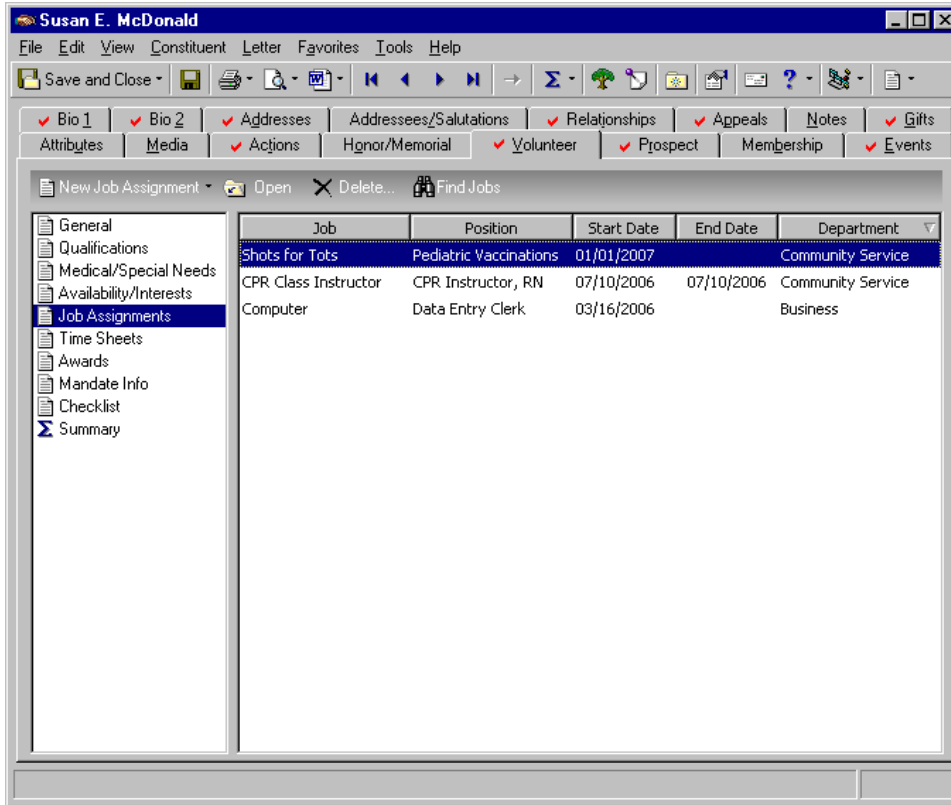


- In the **Assignment Interests** grid, select "Office Staff".
- In the next row, select "Newsletter Staff".
- To save Susan's interests and close her constituent record, click **Save and Close** on the toolbar.

Job Assignments on the Volunteer Tab

Warning: Remember that the Volunteer tab is on a constituent record and the Volunteers tab is on a job record.

You can find jobs in your database and assign them to a volunteer from the Volunteer tab of his constituent record. As you assign jobs to a volunteer, each job assignment lists in the Job Assignments grid on the Volunteer tab of the constituent record and on the Volunteers tab of the job record itself. This allows you to track present and past job assignments in both places.



For detailed information about job records, see “Jobs” on page 81.

Manually Assigning a Job to a Volunteer

Note: Do not confuse job assignments with time sheets. You should assign a volunteer to particular jobs. Then, you can fill out time sheets for the volunteer. A time sheet tracks the hours a volunteer worked on a particular day at a particular job assignment.

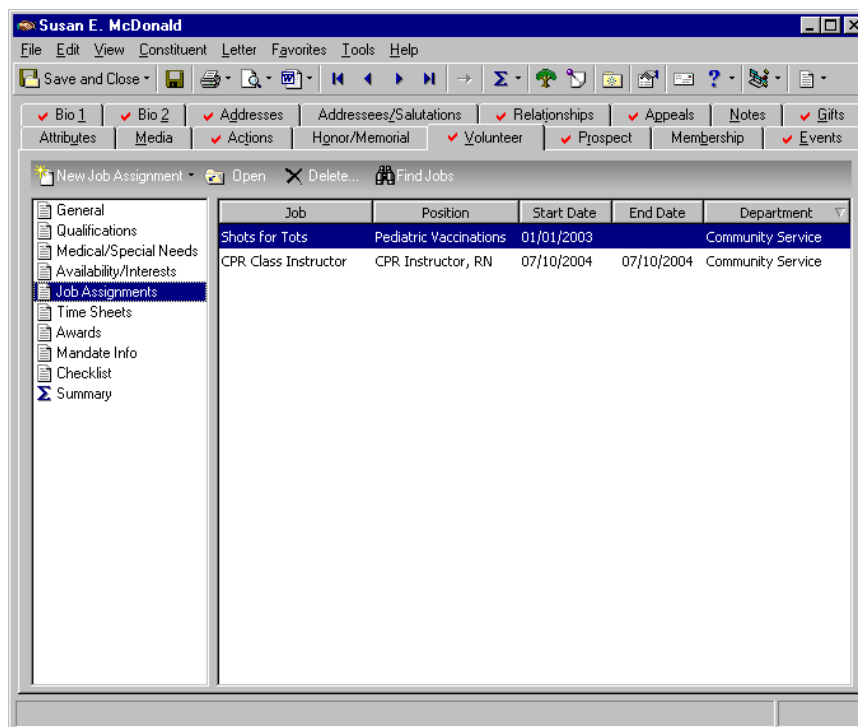
You can manually find a job in your database and assign it to a volunteer by selecting **Job Assignments** from the list on the left of the Volunteer tab and clicking **New Job Assignment** on the action bar above the list. Before you can manually find a job and assign it to a volunteer, you must first add job records to your database. For more information about adding job records to your database, see “Jobs” on page 81.

► **Manually finding a job and assigning it to a volunteer on the Volunteer tab**

Scenario: Susan McDonald, a hardworking volunteer, is starting a new job at your organization. Having heard you need volunteers for a computer job in your business office, she lets you know she can work a day during the week at this job. You both agree on Wednesday evenings from 5:00 p.m. until 7:00 p.m. Add the computer job assignment on the Volunteer tab of Susan’s constituent record.

Note: When you manually assign a job to a volunteer on the Volunteer tab, you can assign as many jobs as you want, but you have to assign them one at a time. If you prefer to find multiple jobs and assign them to a volunteer from the Volunteer tab, you can use the **Find Jobs** button. For information about using the **Find Jobs** button, see “Automatically finding jobs and assigning them to a volunteer from the Volunteer tab” on page 48.

1. From Susan McDonald’s constituent record, select the Volunteer tab. For information about opening a constituent record and accessing the Volunteer tab, see “Accessing the Volunteer tab of a constituent record” on page 8.
2. From the list on the left, select **Job Assignments**. The Job Assignments grid appears on the right.



3. On the action bar above the grid, click **New Job Assignment**. The New Job Assignment screen appears.

Warning: When you search for and locate the job, the **Job**, **Category**, **Position**, and **Volunteer type** appear automatically on the Job Assignment screen. This information defaults on the Job Assignment screen from the job record. You can change the information that defaults into these fields.

4. In the **Job** field, click the binoculars to access the Open screen so you can search your database for the Computer job. When you find and select the Computer job, the **Job**, **Category**, **Position** and **Volunteer type** appear on the Job Assignment screen. For detailed information about the Open screen, see the *Program Basics Guide*.
5. For this procedure, do not change the information that defaults into the **Category**, **Position** and **Volunteer type** fields.
6. For this procedure, leave **Assigned** marked in the **Status** field. The **Assigned** option is automatically marked because you are physically assigning the job to Susan.

This option also works in conjunction with the **RE:Volunteer** component of *NetSolutions*. If you have the **RE:Volunteer** component of *NetSolutions*, and Susan requests through your Web site that you assign her to the Computer job, the **Requested on** option will be marked automatically. The date of the request will be entered automatically in the accompanying date field.

Note: When you integrate *The Raiser's Edge* with *Blackbaud NetCommunity*, a **NetCommunity Job request** checkbox appears on the job assignment screen. This checkbox indicates whether the volunteer's job request was made on your *Blackbaud NetCommunity* Web site. When the volunteer job request transaction is downloaded from *Blackbaud NetCommunity*, the checkbox is automatically marked. You can also manually mark this checkbox when needed. For more information, see the *Blackbaud NetCommunity Integration Guide*.

7. In the **Department** field, select "Business". This is the department under which the job falls.
8. In the **Location** field, select "15 Franklin Avenue". This is the location of the organization.
The same job can potentially exist within the same organization at different locations. The **Location** field helps you differentiate between such jobs.
9. In the **Start Date** field, enter the date 03/15/2005. This is the date Susan starts the Computer job.
If an assignment lasts only one day or you know when a volunteer will complete an assignment, enter an **End Date** on the Assignment screen. Susan is working indefinitely on the Computer job.
10. In the **Start time** field, enter "5:00 PM".

11. In the **End time** field, enter “7:00 PM”.
12. Leave the **Letter sent on** checkbox and accompanying date field unmarked. When you send Volunteer Follow-up letters through *Mail*, this checkbox will be marked automatically. The date the letter is sent through *Mail* will also be entered. If you are sending a single letter and want to notate that you sent the Volunteer Follow-up letter yourself, you can mark this checkbox and enter the date manually.

Note: If an entry does not exist in a drop-down list in a field where you must make a selection, you can always type your entry directly into the field if you have security rights established. A message appears, asking if you want to add the entry to that table. Select **Yes**. Even though you can add a table entry from a field with a drop-down list, for data entry consistency, we recommend you establish your table entries from the **Tables** link of *Configuration*. For information about setting up tables, see the *Configuration & Security Guide*.

13. In the **Task** field, select “Data Entry”. This is the actual task Susan will be performing.
14. In the **Supervisor** field, enter “Marshall Hayes”.
15. In the **Day of week** field, select “Tuesday”.
16. In the **Notes** box, enter “Susan can work extra hours if needed.”

This field can also work in conjunction with the **RE:Volunteer** component of *NetSolutions*. If you have the **RE:Volunteer** component of *NetSolutions*, and Susan makes additional comments on your Web site about her chosen job assignment, the comments can automatically default here.

17. To save and close the job assignment, click **Save and Close** on the toolbar. You return to the Volunteer tab of Susan’s constituent record with the Computer job appearing in the Job Assignments grid.

Remember, Susan’s job assignment will also appear in the Job Assignments grid on the Volunteers tab of the Computer job record.

Automatically Assigning Jobs to a Volunteer

You can automatically find multiple jobs and assign them to a volunteer by using the **Find Jobs** button on the Volunteer tab of his constituent record.

When you use the **Find Jobs** button, you can assign only those jobs having criteria that matches criteria listed on the Volunteer tab. Remember, too much criteria on the Volunteer tab or your job records can limit your ability to find jobs.

To use the **Find Jobs** button effectively, the following criteria should be true on the Volunteer tab and your job records.

Note: From *Reports*, you can run a Volunteer Match List that shows a match between volunteers and criteria you select including qualifications and availability. For more information, see the *Reports Guide*.

- A volunteer **Type** in the **Volunteer Types** grid on the Volunteer tab of the constituent record must match the **Volunteer type** on the General tab of the job record. If a volunteer type does not exist on both the constituent record and the job record, there is a potential match. If a volunteer type exists on the constituent record, but not the job record, there is no match.
- Start Date** and **End Date** in the **Volunteer Types** grid on the Volunteer tab of the constituent record must have a range wide enough to accommodate the **Start date** and **End date** on the General tab of the job record. If these dates do not exist on the constituent record or the job record, there is a potential match. The program also considers the **From Date** and **To Date** in the **Volunteer Availability** grid on the constituent record when checking for valid dates.
- All entries in the **Description**, **Skill Level**, and **License Type** columns of the **Skills and Experience Required** grid on the Details tab of the job record must exist in the **Description**, **Skill Level**, and **License Type** columns of the **Skills and Experience** grid on the Volunteer tab of the constituent record. If an **Expires** date is present in the **Skills and Experience** grid on the constituent record, it must be later than the **Start date** on the General tab of the job record. If you do not want to consider the **Expires** date, leave that column blank in the **Skills and Experience** grid.

- ❑ All entries in the **Course Name** and/or **Certification** columns of the **Courses and Training Required** grid on the Details tab of the job record must exist in the **Course Name** and/or **Certification** columns of the **Courses and Training** grid on the Volunteer tab of the constituent record. (A course may exist without a certification and vice versa. If a course and certification exist on the same row on the job record, the program considers them related, and they must exist on the same row on the constituent record.) The **Start Date** in the **Courses and Training** grid on the constituent record for each course/certification must be before the **End date** on the General tab of the job record. The **Expires** date in the **Courses and Training** grid on the Volunteer tab of the constituent record for each course/certification must be later than the **Start date** on the General tab of the job record. If you do not want to consider the **Expires** date, leave that column blank in the **Courses and Training** grid.
- ❑ All entries in the **Description** column of the **Medical Information Required** grid on the Details tab of the job record must exist in the **Description** column of the **Medical Information** grid on the Volunteer tab of the constituent record. The **Date** in the **Medical Information** grid on the constituent record must be before the **End date** on the General tab of the job record.
- ❑ To exclude volunteers, all entries in the **Special Need** column of the **Do Not Assign Volunteers Needing** grid on the Details tab of the job record must exist in the **Description** column of the **Special Needs** grid on the Volunteer tab of the constituent record. If you leave information in the **Special Needs** grid on the constituent record or information in the **Do Not Assign Volunteers Needing** grid on the job record blank, or if the information in these two grids do not match, the volunteer can be assigned to the job.
- ❑ All attribute entries in the **Category** and **Description** columns of the **Include Volunteers with these Attributes** grid on the Details tab of the job record must match attribute entries in the **Category** and **Description** columns on the Attributes tab of the volunteer's constituent record. If the attributes listed in the **Include Volunteers with these Attributes** grid on the Details tab of the job record exist on the Attributes tab of the constituent record, there is a potential match.
- ❑ To exclude particular volunteers, if the attributes listed the **Category** and **Description** columns of the **Include Volunteers with these Attributes** grid on the Details tab of the job record exist in the **Category** and **Description** columns on the Attributes tab of the volunteer's constituent record, there is no match.
- ❑ All entries in the **Assignment Interests** grid on the Details tab of the job record must exist in the **Assignment Interests** grid on the Volunteer tab of the constituent record. (You can have more assignment interests listed on the Volunteer tab of the constituent record than on the Details tab of the job record, and still have a match.) If assignment interests do not exist on the Details tab of the job record and Volunteer tab of the constituent, there is a potential match.
- ❑ All entries in the **Checklist Item** grid on the Details tab of the job record must exist in the **Volunteer Checklist** grid on the Volunteer tab of the constituent record. (You can have more checklist items listed on the Volunteer tab of the constituent record than on the Details tab of the job record, and still have a match.) **Date Completed** in the **Volunteer Checklist** grid on the Volunteer tab of the constituent record must be before the **End date** on the General tab of the job record. If you leave **Date Completed** in the **Volunteer Checklist** grid on the constituent record blank, the volunteer does not match because the program assumes the volunteer did not complete the checklist.
- ❑ To include mandated volunteers, you must mark the **Allow mandated volunteers** checkbox on the General tab of the job record. A mandated volunteer is indicated by the **Start date** and **Date completed** fields under the **Mandate Info** section on the Volunteer tab of a constituent record. If a volunteer is a mandate during any part of the date range on the General tab of the job record (**Start date** and **End date**), there is a potential match.

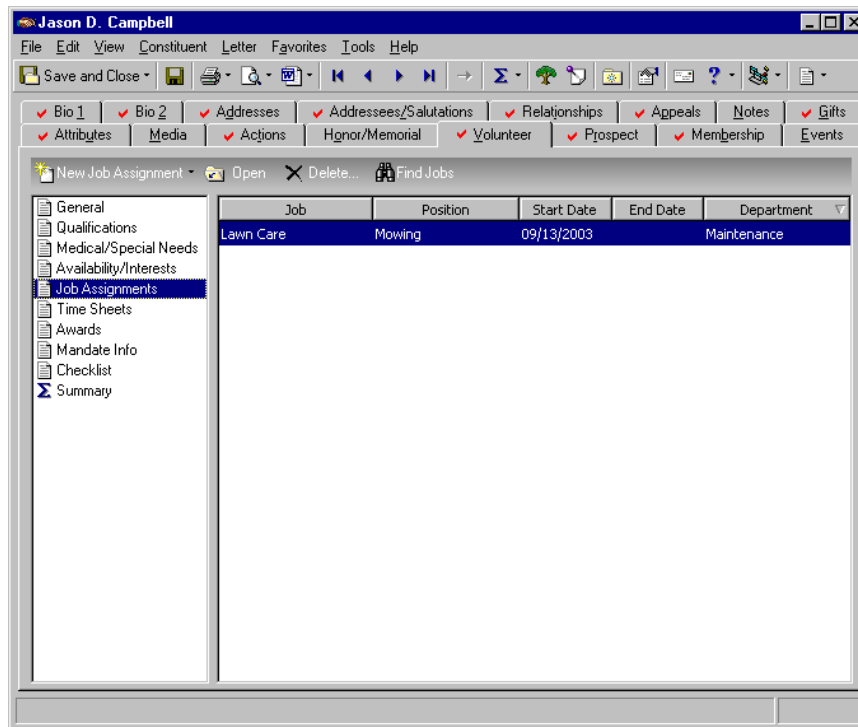
▶ **Automatically finding jobs and assigning them to a volunteer from the Volunteer tab**

Scenario: Jason Campbell calls and lets you know he wants to volunteer at your organization. You enter necessary criteria on the Volunteer tab of his constituent record. Now, you need to match Jason to the correct jobs. On the Volunteer tab of Jason's constituent record, use the **Find Jobs** button to automatically find jobs and assign them to him.

1. From Jason Campbell's constituent record, select the Volunteer tab. For information about opening a constituent record and accessing the Volunteer tab, see "Accessing the Volunteer tab of a constituent record" on page 8.

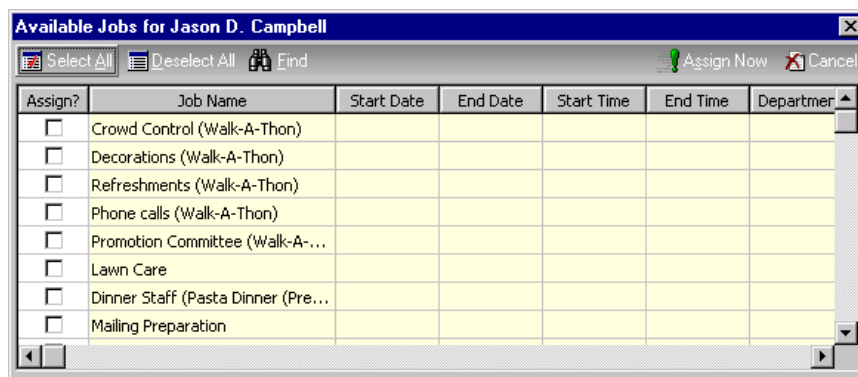
Note: The **Find Jobs** button appears on the action bar at all times. Your selection in the list on the left does not affect your ability to use this button to find jobs and assign them to a volunteer. In this scenario, we suggest selecting **Job Assignments** from the list on the left before you use **Find Jobs** because the jobs you assign appear in the Job Assignments grid on the right.

- From the list on the left, select **Job Assignments**. The Job Assignments grid appears on the right.



Note: From *Reports*, you can run a Job Assignment Summary that provides a breakdown of hours worked by your volunteers. The hours can be broken down into number of periods defined by you (up to 12 periods). Names and addresses do not appear on this report. For more information, see the *Reports Guide*.

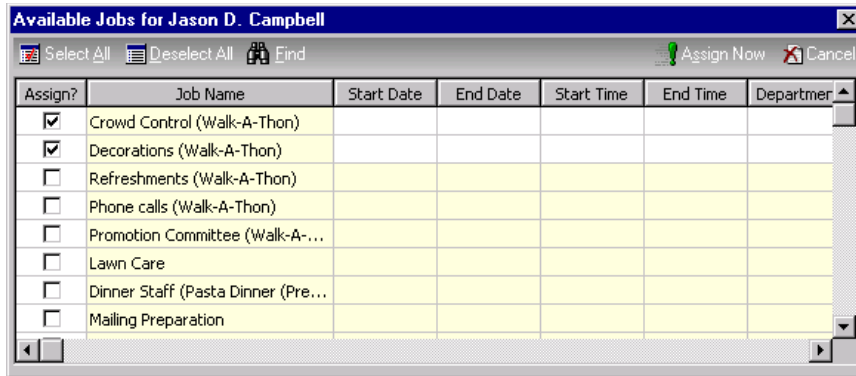
- On the action bar, click **Find Jobs**. The Available Jobs screen appears.



The **Job Name** appears on the Available Jobs screen and is locked. It defaults from the job record. You cannot change the job name. **Category** and **Position** default on the Available Jobs screen from the job record, also. You can edit the information that defaults into these two columns. You can add information in any of the other columns. The columns on the Available Jobs screen are: **Job Name**, **Start Date**, **End Date**, **Start Time**, **End Time**, **Department**, **Location**, **Category**, **Position**, **Task**, **Supervisor**, **Day of Week**, and **Notes**. You must scroll to see the other columns.

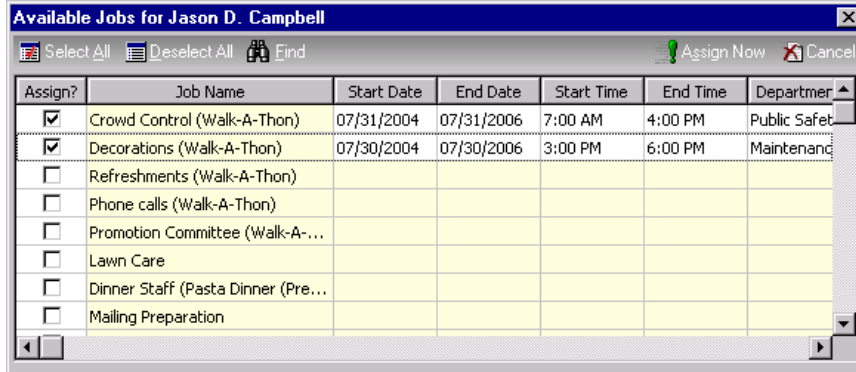
Tip: If you want to select all jobs in the grid on the Available Jobs screen, click **Select All** on the action bar above the grid. If you want to unmark all check marks in the **Assign?** columns, click **Deselect All**.

4. Mark the checkbox in the **Assign?** column by the job(s) you want to assign to Jason. Once you mark a checkbox in the **Assign?** column by a job, all columns in that row are unlocked so you can enter information.



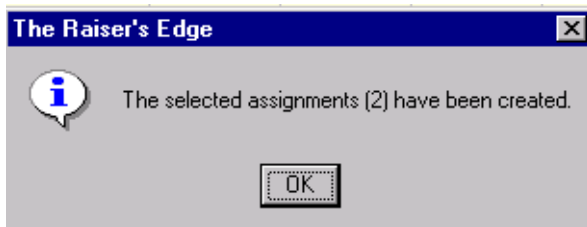
Tip: If the list of jobs on the Available Jobs screen is long, you can use the **Find** button on the action bar to quickly search for a job you want to assign.

5. Enter a **Start Date**, **End Date**, **Start Time**, **End Time**, **Department**, **Location**, **Task**, **Supervisor**, **Day of Week**, and **Notes**, depending on the information you use at your organization. You can accept the default **Category** and **Position** or you can edit the information that appears.



Note: You can click **Cancel** on the action bar of the Available Jobs screen to return to the Volunteer tab if you decide you do not want to assign a job to the volunteer.

6. On the action bar, click **Assign Now** to assign the selected jobs to Jason. If the job assignments match the criteria on the Volunteer tab, you receive a confirmation message.



7. Click **OK**. The new assigned jobs now appear in the Job Assignments grid on the Volunteer tab of Jason's constituent record.

Remember, Jason’s job assignments will also appear separately in the Job Assignments grid on the Volunteers tab of each job record.

- To save the job assignments and close Jason’s constituent record, click **Save and Close** on the toolbar.

Editing and Deleting Job Assignments on the Volunteer Tab

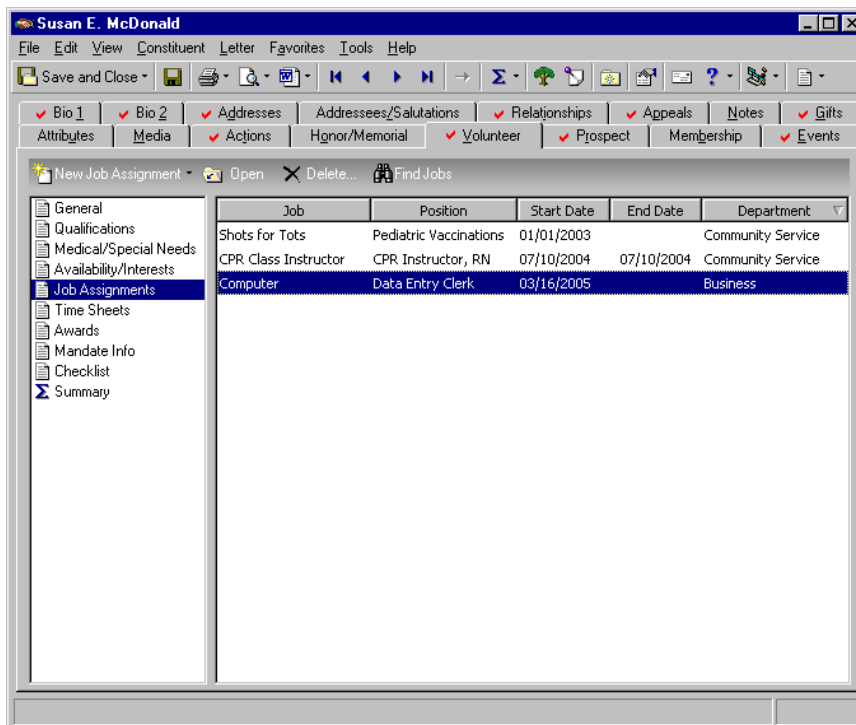
After you assign jobs to a volunteer, if you have security rights, you can open a job assignment in the Job Assignments grid on the Volunteer tab of the constituent record for viewing or editing. You can also delete a job assignment from the same grid. For information about security rights, see the *Configuration & Security Guide*.

▶ Editing a job assignment on the Volunteer tab

You can edit information on an existing job assignment if you have security rights established from the **Security** link of *Administration*. For information about security rights, see the *Configuration & Security Guide*.

Scenario: Susan McDonald voluntarily works in your business office. She originally told you she could work on Wednesday evenings from 5:00 p.m. until 7:00 p.m. She now lets you know she can work from 5:00 p.m. until 8:00 p.m. Open the computer job assignment on the Volunteer tab of Susan’s constituent record and change this information. If you have not assigned a job to Susan, see “Manually finding a job and assigning it to a volunteer on the Volunteer tab” on page 45.

- From Susan McDonald’s constituent record, select the Volunteer tab. For information about opening a constituent record and accessing the Volunteer tab, see “Accessing the Volunteer tab of a constituent record” on page 8.
- From the list on the left, select **Job Assignments**. The Job Assignments grid appears on the right.



- In the Job Assignments grid, select the Computer job you want to edit and click **Open** on the action bar above the grid. The Job Assignment screen for Susan appears.

Job Assignment for Susan E. McDonald

File Edit View Job Assignment Help

Save and Close

Job: Computer

Status: Assigned Requested on: [calendar icon]

Department: Business Position: Data Entry Clerk

Location: 15 Franklin Avenue Task: Data Entry

Category: Office Staff Volunteer type: Computer Operator

Start date: 03/16/2005 Start time: 5:00 PM Supervisor: Marshall Hayes

End date: [calendar icon] End time: 7:00 PM Day of week: Tuesday

Letter sent on: [calendar icon]

Notes: Susan can work extra hours if needed.

Press F7 for Job search

- In the **End time** field, delete 7:00 PM and enter “8:00 PM” in the field.

Job Assignment for Susan E. McDonald

File Edit View Job Assignment Help

Save and Close

Job: Computer

Status: Assigned Requested on: [calendar icon]

Department: Business Position: Data Entry Clerk

Location: 15 Franklin Avenue Task: Data Entry

Category: Office Staff Volunteer type: Computer Operator

Start date: 03/16/2005 Start time: 5:00 PM Supervisor: Marshall Hayes

End date: [calendar icon] End time: 8:00 PM Day of week: Tuesday

Letter sent on: [calendar icon]

Notes: Susan can work extra hours if needed.

- To save the changes and close the Job Assignment screen, click **Save and Close** on the toolbar. You return to the Volunteer tab of Susan’s constituent record.

The changes you make to Susan’s Computer job assignment in the Job Assignments grid on the Volunteer tab of her constituent record reflect on her job assignment in the Job Assignments grid on the Volunteers tab of the Computer job record.

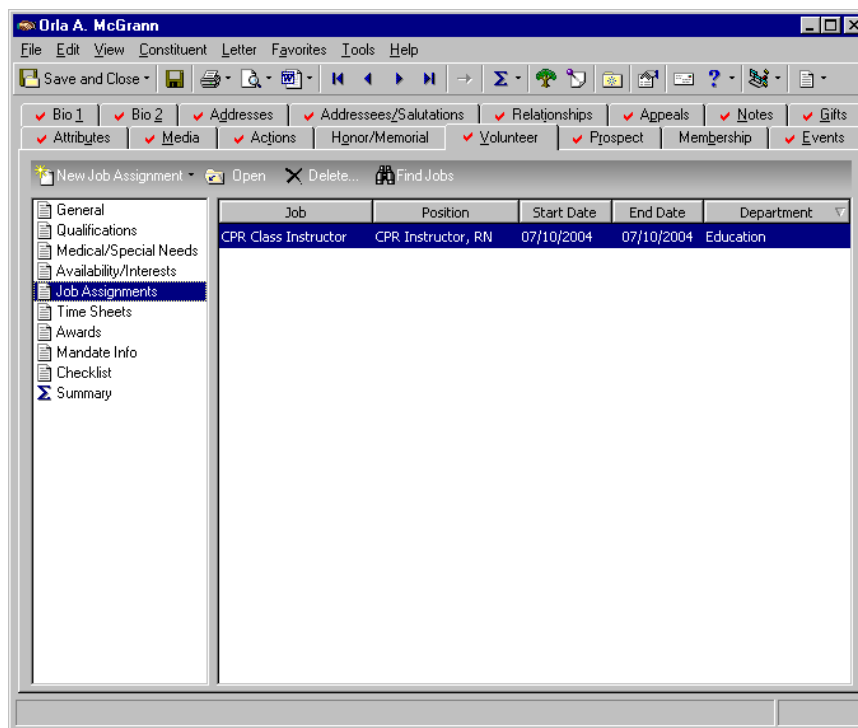
▶ Deleting a job assignment on the Volunteer tab

If you are positive a job assignment is no longer needed on a constituent's Volunteer tab and you have security rights, you can delete the job assignment. For information about security rights, see the *Configuration & Security Guide*.

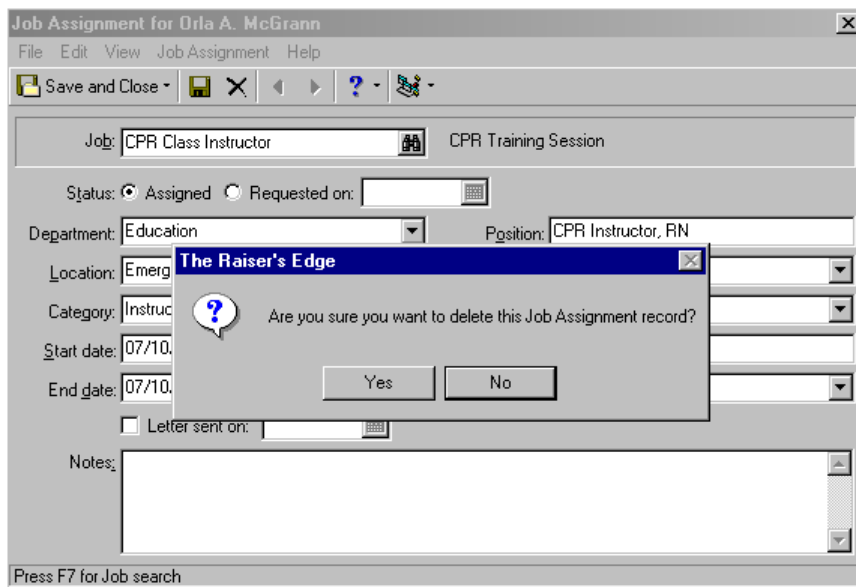
Scenario: Orla McGrann calls to let you know she cannot work as a CPR Instructor for your organization this year. From Orla McGrann's Volunteer tab, delete the CPR Instructor job assignment. If you have not added a job assignment see "Manually finding a job and assigning it to a volunteer on the Volunteer tab" on page 45.

Warning: Remember that deleting is permanent. There is no "undo." If you are going to delete a lot of job assignments from *The Raiser's Edge* database, you should have a complete backup of your database. To successfully back up your data, you must first shut down the database.

1. From Orla McGrann's constituent record, select the Volunteer tab. For information about opening a constituent record and accessing the Volunteer tab, see "Accessing the Volunteer tab of a constituent record" on page 8.
2. From the list on the left, select **Job Assignments**. The Job Assignments grid appears on the right.



3. Select the job assignment you want to permanently delete and click **Delete** on the action bar. The job assignment opens and a message appears.



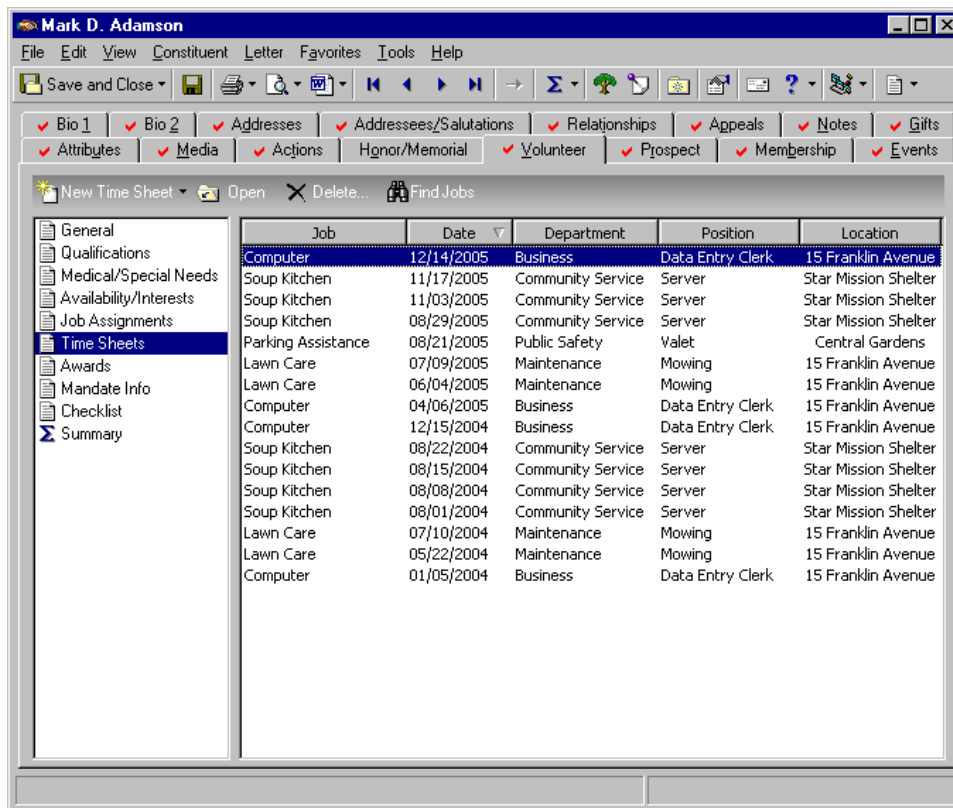
4. Click **Yes**. The job assignment disappears from the Job Assignments grid.
If you delete a job assignment in the Job Assignments grid on Orla's Volunteer tab, her same job assignment will disappear from the Job Assignments grid on the Volunteers tab of the job record.
5. To save the changes and close Orla's constituent record, click **Save and Close** on the toolbar.

Time Sheets on the Volunteer Tab

Note: Do not confuse time sheets with job assignments. A time sheet tracks the hours a volunteer worked on a particular day at a job assignment.

A time sheet summarizes the hours a volunteer worked at a particular job on a particular date and calculates the value of that time. You can add a Volunteer time sheet by using the **New Time Sheet** button on the Volunteer tab of a volunteer's constituent record. From a time sheet, you can search your database for the job you assigned a volunteer.

Once you find the job, the job name, category, position, and volunteer type appear automatically on the time sheet. This information defaults from the job record itself. On the time sheet, you can also track job information such as the department under which the job falls, the location where the job took place, and the particular task performed. The time sheets you create for a volunteer list in a grid on the Volunteer tab of the constituent record.



► Adding a time sheet on the Volunteer tab

Note: From *Reports*, you can run a Time Sheet Report that lists your volunteers and their assignments with detailed information about hours worked at each assignment and the value of the time worked. For each volunteer, the report totals the hours for the period and prints a year-to-date total and a cumulative total. For more information, see the *Reports Guide*.

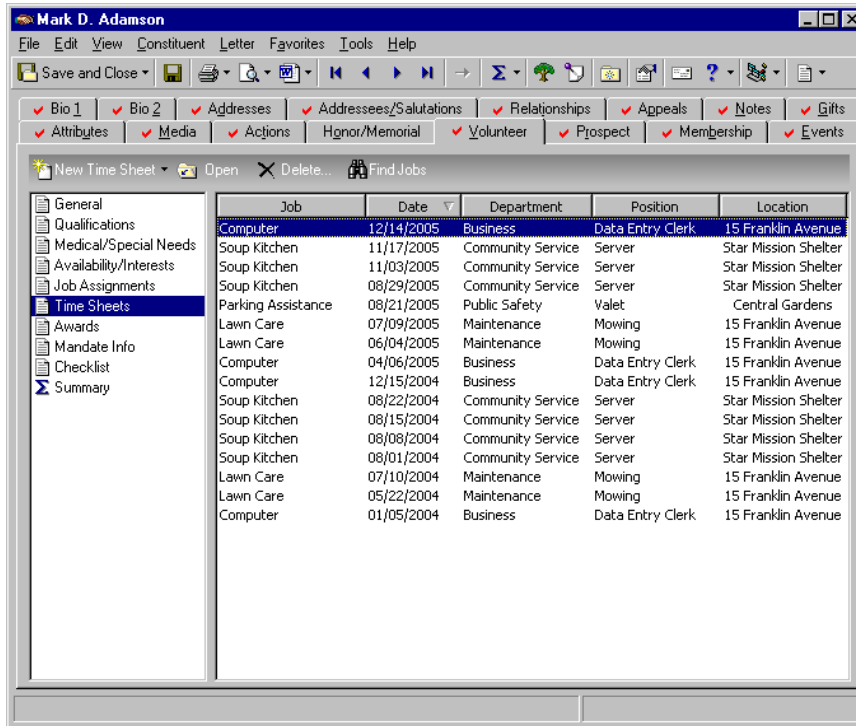
You can add a volunteer time sheet by selecting **Time Sheets** from the list on the left of the Volunteer tab and clicking **New Time Sheet** on the action bar.

Scenario: Your environmental organization held its annual Clean Up Our Neighborhoods day. Mark Adamson, a volunteer at your organization, worked all day picking up trash from the streets and common areas of his neighborhood. From the Volunteer tab of Mark's constituent record, track the hours he worked. The hours are important to you because your organization gives awards at the end of the year to volunteers who work the most hours.

1. From Mark Adamson's constituent record, select the Volunteer tab. For information about opening a constituent record and accessing the Volunteer tab, see "Accessing the Volunteer tab of a constituent record" on page 8.

Tip: You can quickly enter your time sheets in a batch. For more information about the batch entry of time sheets, see the Time Sheet Batch chapter of the *Batch Guide*.

- From the list on the left, select **Time Sheets**. The Time Sheets grid appears on the right, listing time sheets from previous days Mark volunteered for your organization.



- On the action bar, click **New Time Sheet**. The New Time Sheet appears.

The screenshot shows the 'New Time Sheet for Mark D. Adamson' form. The fields are filled as follows:

- Date: 03/16/2006
- Job: Environmental Clean Up
- Department: Environmental Resources
- Position: Clean Up Crew
- Location: 24 High Water Street
- Task: Trash Pick-up
- Category: Residential Areas
- Volunteer type: Residential
- Notes: Mark worked in Highgrove Terrace, his own neighborhood.
- Hours: 6.00
- Hourly wage: \$6.00
- Value: \$36.00
- Apply time sheet toward required mandate hours

Note: It is possible to enter a time sheet and not indicate a job. You can leave the **Job** field blank and use the fields you need on the Time Sheet screen.

- In the **Date** field, enter the date 03/16/2006.

5. In the **Job** field, click the binoculars to access the Open screen so you can search for the Environmental Clean Up job. For information about the Open screen, see the *Program Basics Guide*.
6. For this procedure, do not change the information that defaults into the **Category, Position, and Volunteer type** fields.

Warning: When you search for and locate the job, the **Job, Category, Position, and Volunteer type** appear automatically on the time sheet. This information defaults on the time sheet from the Job record. You can change the information that defaults into these fields. For more information about job records, see “Jobs” on page 81.

7. In the **Department** field, select “Environmental Resources”. This is the department under which the job falls.
8. In the **Location field**, select “24 High Water Street”. This is the location of the organization.
The same job can potentially exist within the same organization at different locations. The **Location** field helps you differentiate between such jobs.
9. In the **Task** field, select “Trash Pick-up”. This is the actual task Mark worked on.
10. In the **Notes** box, enter “Mark worked in Highgrove Terrace, his own neighborhood.”
11. In the **Hours** field, enter the number 6 and in the **Hourly wage** field, enter the amount \$6. When you leave these fields, the value calculates automatically to \$36.00.

Warning: Marking the **Apply time sheet toward required mandate hours** checkbox is the only way the **Hours served** field is updated automatically on the mandate record. For information about the **Hours served** field, see “Adding mandate information on the Volunteer tab” on page 74.

12. Do not mark the **Apply time sheet toward required mandate hours** checkbox because Mark is not a mandated volunteer. For information about tracking mandated volunteers, see “Adding mandate information on the Volunteer tab” on page 74.
13. To save Mark’s time sheet, click **Save and Close** on the toolbar. The time sheet appears in the first row of the Time Sheets grid on the Volunteer tab of Mark’s constituent record.
14. On the toolbar, click **Save and Close**.

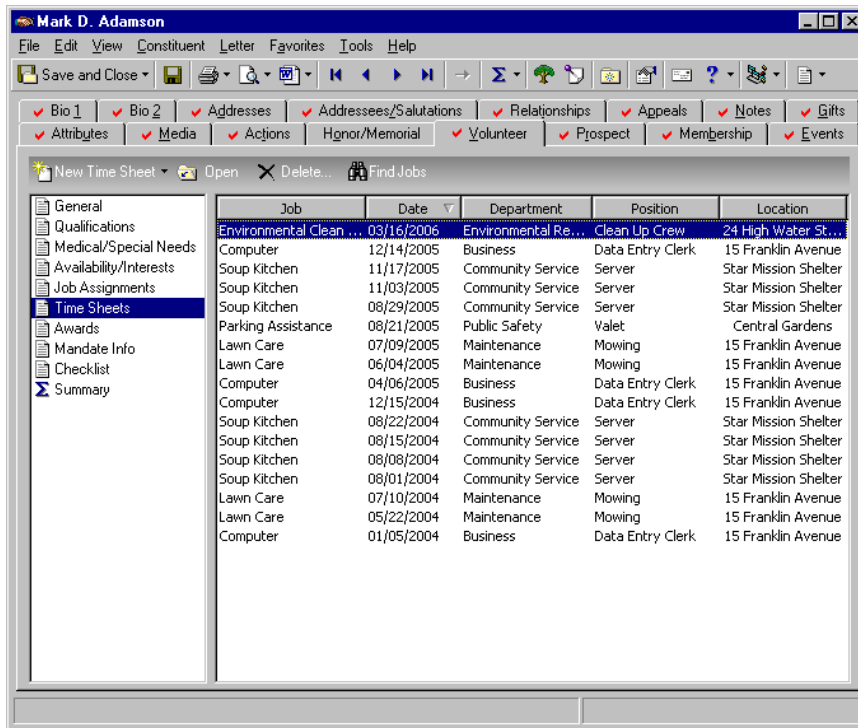
▶ **Editing a time sheet on the Volunteer tab**

You can edit information on an existing time sheet.

Scenario: Your environmental organization held its annual Clean Up Our Neighborhoods day. Mark Adamson, a volunteer at your organization worked all day picking up trash from the streets and common areas of his neighborhood. After the event, you notice a co-worker entered six hours on Mark’s time sheet and you know he worked a solid eight hours. Open his existing time sheet and make the correction. If you have not added Mark’s time sheet, see “Adding a time sheet on the Volunteer tab” on page 55.

1. From Mark Adamson’s constituent record, select the Volunteer tab. For information about opening a constituent record and accessing the Volunteer tab, see “Accessing the Volunteer tab of a constituent record” on page 8.

- From the list on the left, select **Time Sheets**. The Time Sheet grid appears on the right, listing time sheets from previous days Mark volunteered for your organization.



- In the Time Sheet grid, select the Environmental Clean Up job and click **Open** on the action bar above the grid. Mark's time sheet appears.

The screenshot shows the 'Time Sheet for Mark D. Adamson' form. The form contains the following fields and values:

- Date: 03/16/2006
- Job: Environmental Clean Up
- Department: Environmental Resources
- Position: Clean Up Crew
- Location: 24 High Water Street
- Task: Trash Pick-up
- Category: Residential Areas
- Volunteer type: Residential
- Notes: Mark worked in Highgrove Terrace, his own neighborhood.
- Hours: 6.00
- Hourly wage: \$6.00
- Value: \$36.00

There is a checkbox for 'Apply time sheet toward required mandate hours' which is currently unchecked. At the bottom, it says 'Press F3 for today's date, F7 for calendar'.

- In the **Hours** field, delete 6.00 and enter the number 8. When you leave this field, 8.00 appears in the **Hours** field and **Hourly wage** recalculates to \$48.00.

- To save the time sheet information, click **Save and Close** on the toolbar. You return to the Volunteer tab of Mark's constituent record.
- On the toolbar, click **Save and Close**.

▶ Deleting a time sheet on the Volunteer tab

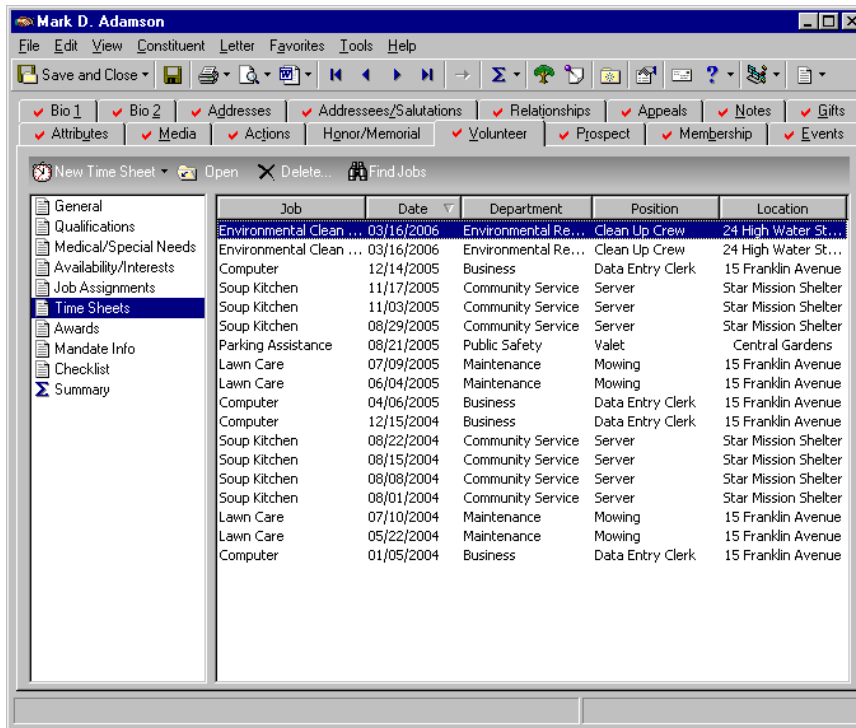
If you are positive a time sheet is no longer needed, you can delete the time sheet, if you have security rights. For information about security rights, see the *Configuration & Security Guide*.

Scenario: Your environmental organization held its annual Clean Up Our Neighborhoods day. Mark Adamson, a volunteer at your organization worked all day picking up trash from the streets and common areas of his neighborhood. After the event, you notice a co-worker entered a time sheet twice for Mark's day of work. After you study both records and you are absolutely positive they are the same time sheet, delete the duplicate. If you have not added Mark's time sheet, see "Adding a time sheet on the Volunteer tab" on page 55.

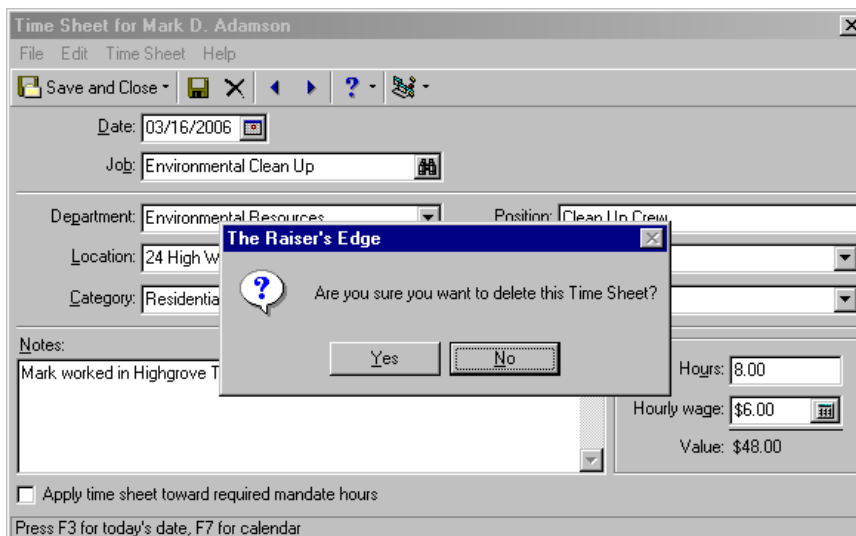
Warning: Remember that deleting is permanent. There is no "undo." If you are going to delete a lot of time sheets from *The Raiser's Edge* database, you should have a complete backup of your database. To successfully back up your data, you must first shut down the database.

- From Mark Adamson's constituent record, select the Volunteer tab. For information about opening a constituent record and accessing the Volunteer tab, see "Accessing the Volunteer tab of a constituent record" on page 8.

- From the list on the left, select **Time Sheets**. The Time Sheet grid appears on the right with the same time sheet listing twice.



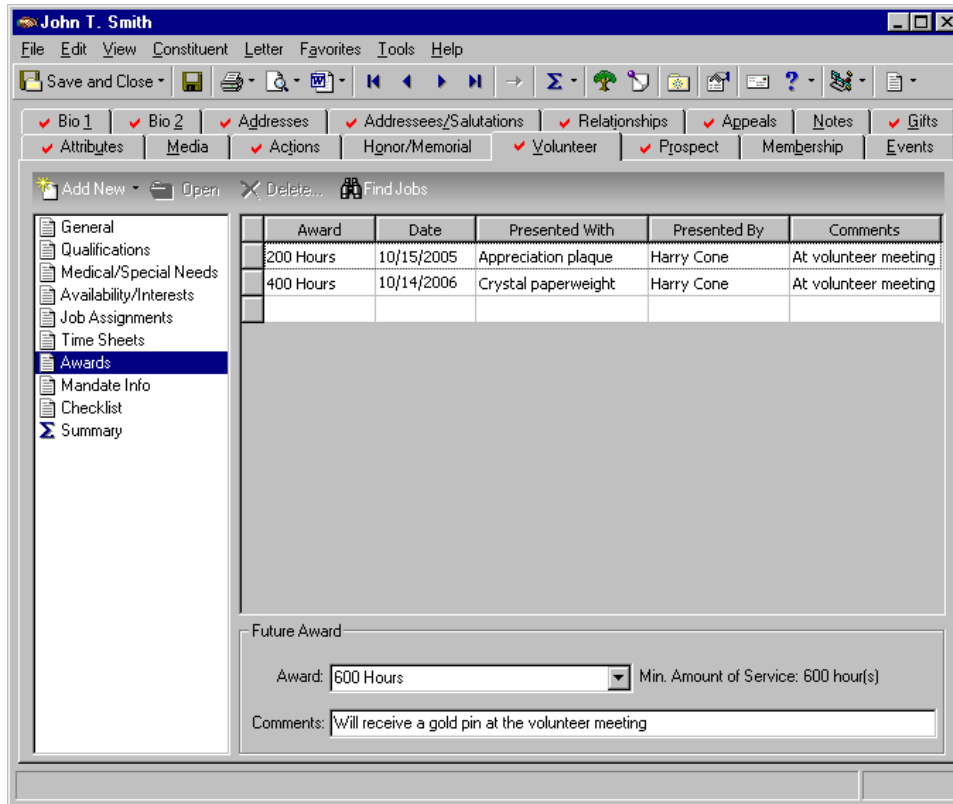
- Select one of the duplicate records and click **Delete** on the action bar. The time sheet opens and a message appears, asking if you are sure you want to delete the time sheet.



- Click **Yes**. The record disappears permanently from the Time Sheet grid.
- To save the changes and close Mark's constituent record, click **Save and Close** on the toolbar.

Volunteer Awards

Many organizations award volunteers for their loyal commitment and service. On the Volunteer tab of each volunteer's constituent record, you can build a history of service by tracking awards given to the volunteer. Each award you add appears in the Awards grid. You can also designate the next award for which the volunteer is tentatively scheduled and enter any comments you have concerning the next award.



Awards

Note: From *Reports*, you can run a Volunteer Awards Report that lists your volunteers with each award level reached. Each volunteer lists with the minimum amount of service, the award given, and the presenter of the award. For more information, see the *Reports Guide*.

An award is something you present to a volunteer in recognition of outstanding service and loyal commitment. For example, you may present your volunteers with an engraved pen and pencil set when they complete 200 hours of service.

	Award	Date	Presented With	Presented By	Comments
	Volunteer Appreciation	03/12/2005	T-shirt	Bill Cone	At the volunte
	Exceptional Volunteer	03/11/2006	Engraved plaque	Bill Cone	At the volunte

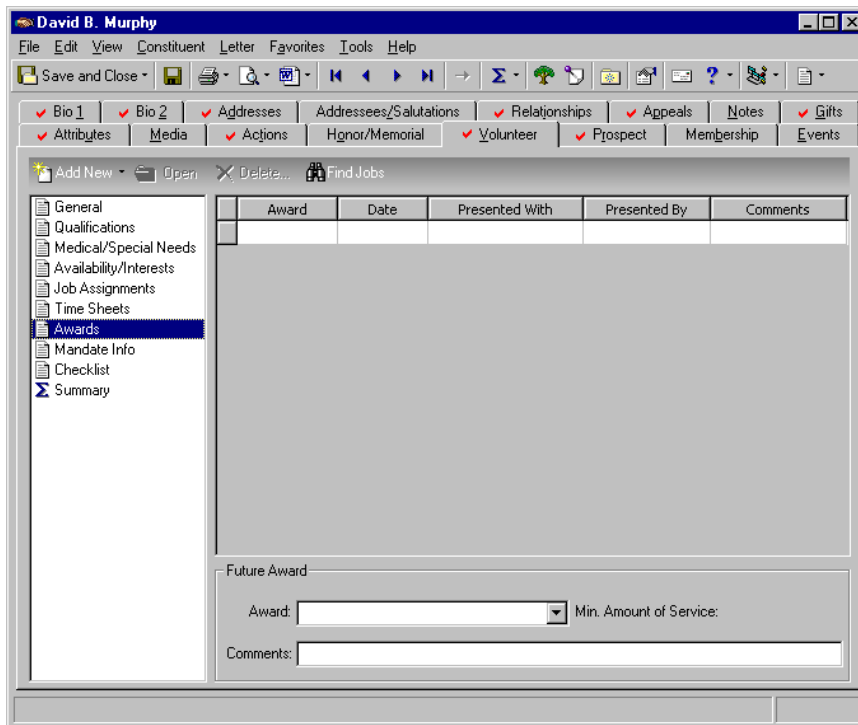
In the Awards grid, you can select the award your volunteer is presented in the **Award** column or you can add a new award to the awards table appearing in this column, if you have security rights established. The name or description of the award should appear in the **Award** column. For example, your organization may give out a Volunteer Appreciation award, an Exceptional Volunteer award, or a Volunteer of the Year award. After you enter the award, you should enter the **Date** the award was presented to the volunteer. Next, in the **Presented With** column, you should enter the physical prize the volunteer received for achieving the award. Perhaps when a volunteer wins the Volunteer Appreciation award, you present him with a booklet of movie coupons. When a volunteer wins the Exceptional Volunteer award, you present an engraved plaque. You can also notate who the award was **Presented By** and any additional **Comments** you have concerning the volunteer or the award.

► **Adding volunteer awards on the Volunteer tab**

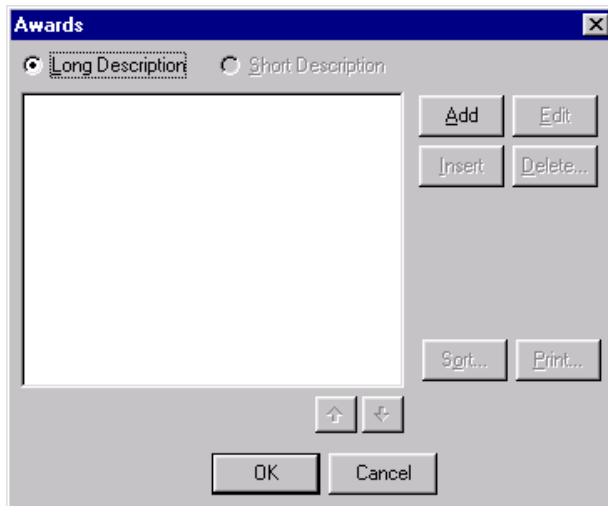
You can track awards presented to a volunteer by selecting **Awards** from the list on the left of the Volunteer tab and adding the awards in the Awards grid on the right. In the Awards grid, you can select your award in the **Award** column if you already set up your awards table from the **Table** link of *Configuration*. This procedure shows you how to add an award from the Awards grid, but for data entry consistency, we recommend you set your award table up in *Configuration* and simply select an award in the Awards grid. For more information about setting up tables, see the *Configuration & Security Guide*.

Scenario: Your organization is a hospital. David Murphy, an exceptional volunteer, logged 200 hours working at the patient information desk. David received the Volunteer Appreciation award at the last volunteer meeting. Add this award on the Volunteer tab of David's constituent record.

1. From David Murphy's constituent record, select the Volunteer tab. For information about opening a constituent record and accessing the Volunteer tab, see "Accessing the Volunteer tab of a constituent record" on page 8.
2. From the list on the left, select **Awards**. The Awards grid and **Future Award** frame appear on the right.



- On a new row of the Awards grid, click in the **Award** column and press **F7** on your keyboard. The Awards lookup screen appears. If you have entered other Awards, they will appear on this screen.

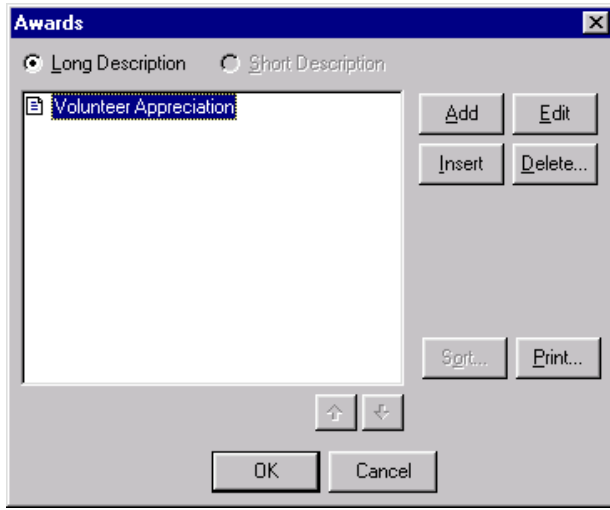


Warning: You cannot access the Table Entry screen if you add the award directly into the grid (“on the fly”). To access the Awards Table Entry screen, you must press **F7** on your keyboard. When the Awards lookup screen appears, you can then click **Add** to add a new Award to the Awards table, **Edit** to change an existing award, or **Delete** to delete an existing award, if the award is not used on other volunteer records.

- Click **Add**. The New Award Table Entry screen appears.

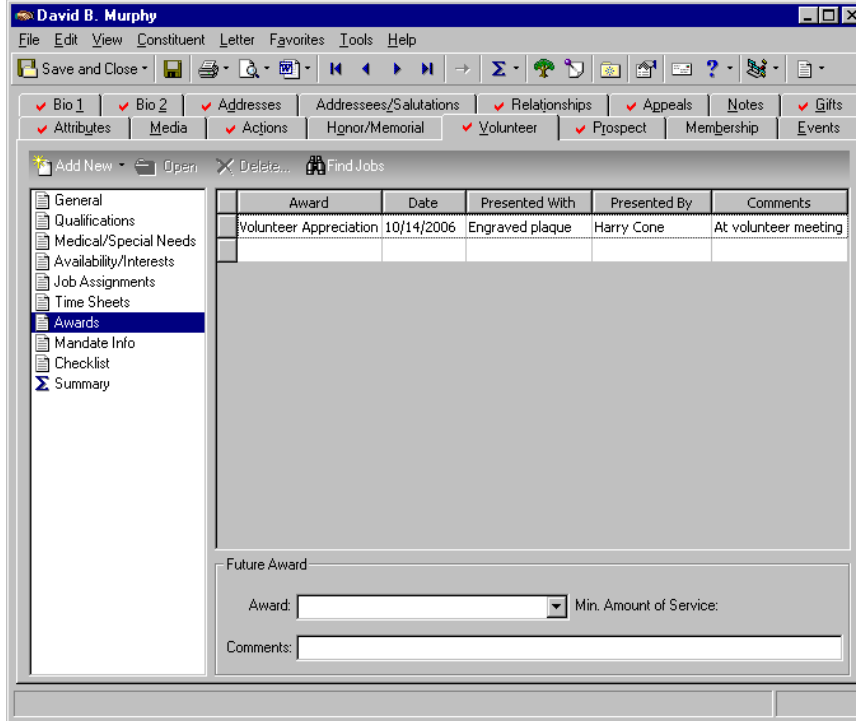
- On the New Award Table Entry screen, in the **Description** field, enter “Volunteer Appreciation”. This is the name/description of the award presented to David.
- In the **Min amount of service** field, enter “200”. This is the number of hours David had to work to attain the award.
- Do not mark the **Inactive** checkbox. You want this award to be active in your database.

8. Click **OK**. The award name/description appears in the box on the Awards lookup screen.



Note: When you add awards from the Awards lookup screen on any volunteer’s constituent record, the awards appear for selection in a drop-down list in the **Award** field of the Awards grid and in the **Award** field in the **Future Award** frame on the Volunteer tab of all your volunteers’ constituent records.

9. On the Awards lookup screen, click **OK**. The award appears in the Awards grid on the Volunteer tab. If you already set up your Awards table from the **Tables** link of *Configuration*, you can simply select “Volunteer Appreciation” in the **Award** column.



10. In the Awards grid, enter the date 10/14/2006 in the **Date** column. This is when David received the award.
11. In the **Presented With** column, enter “Engraved plaque”. This is the physical award presented to David.
12. In the **Presented By** column, enter “Harry Cone”, the person who presented the award to David.

13. In the **Comments** column, enter “At volunteer meeting” because you want to notate where David received the award.
14. To save the award information and to close David’s constituent record, click **Save and Close** on the toolbar.

Future Awards

A future award is the next award a volunteer will qualify for, if she completes the service requirements for that award. For example, Jacquelyn Weber, a volunteer at your organization, received the Volunteer Silver Award at the last volunteer meeting. The next award Jacquelyn will receive is the Volunteer Gold Award, if she completes 500 hours of volunteer service. Because this is Jacquelyn’s next tentative award in the future, it is termed a “future award.”

In the **Future Award** frame, you can select your volunteer’s future award in the **Award** field, or you can add a new award to the awards table appearing in this field, if you have security rights established. The name or description of the award should appear in this field. For example, your organization may give out a Volunteer Appreciation award, an Exceptional Volunteer award, or a Volunteer of the Year award. Once you enter your award, the minimum amount of service appears to the right of this field. In the **Future Award** frame, you can also enter any comments you have concerning the volunteer or his future award.

► Adding future awards on the Volunteer tab

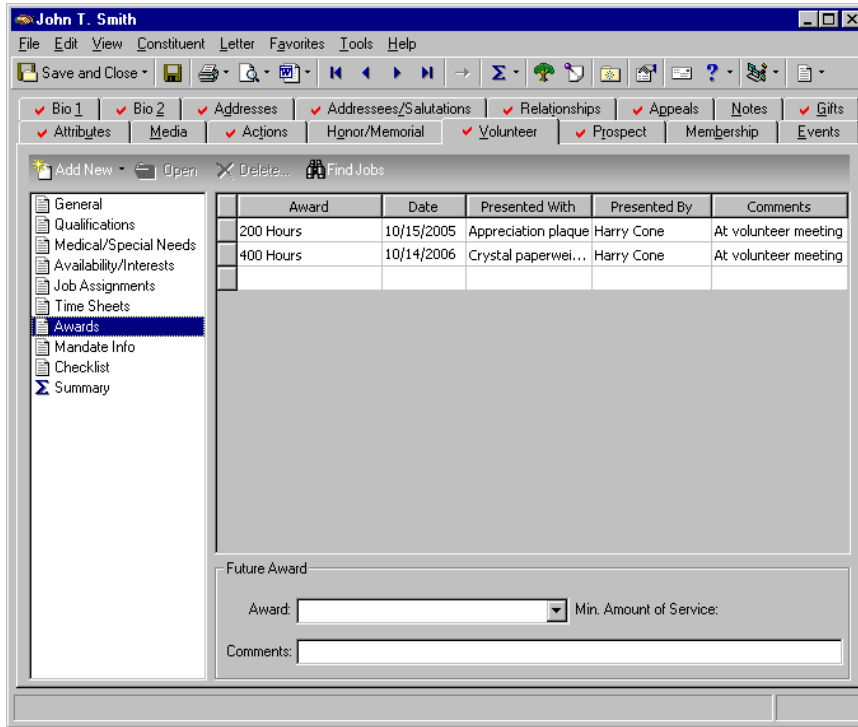
Note: From *Reports*, you can run a Future Awards Report which provides a list of volunteers with the award that is due, the hours worked, the last date worked, and the cumulative hours worked. For more information, see the *Reports Guide*.

You can track future awards by selecting **Awards** from the list on the left of the Volunteer tab and entering information in the **Future Award** frame on the right. You can select your award in the **Award** field if you already set up your awards table from the **Table** link of *Configuration*. This procedure shows you how to add an award from the **Award** field, but for data entry consistency, we recommend you set your award table up in *Configuration* and simply select an award in the **Award** field. For more information about setting up tables, see the *Configuration & Security Guide*.

Scenario: Your organization is a hospital. You give out awards to your volunteers based on hours of service. John Smith, an exceptional volunteer, logged 400 hours working at the patient information desk and was given an award at the last volunteer meeting. John is slated for his next award when he completes 600 hours of service. Enter the next future award on the Volunteer tab of his constituent record.

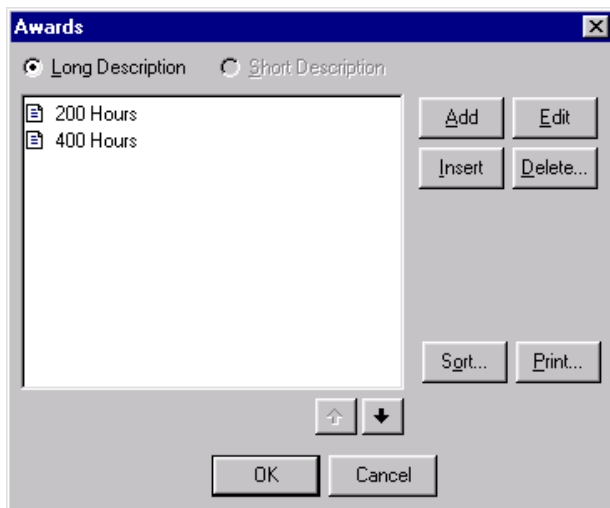
1. From John Smith’s constituent record, select the Volunteer tab. For information about opening a constituent record and accessing the Volunteer tab, see “Accessing the Volunteer tab of a constituent record” on page 8.

2. From the list on the left, select **Awards**. The Awards grid and **Future Award** frame appear on the right.

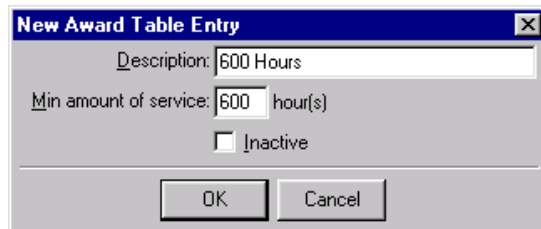


Warning: You cannot access the Table Entry screen if you add the award directly into the field (“on the fly”). To access the Awards Table Entry screen, you must press **F7** on your keyboard. When the Awards lookup screen appears, you can then click **Add** to add a new Award to the Awards table, click **Edit** to change an existing award, or click **Delete** to delete an existing award, if the award is not used on other volunteer records.

3. In the **Future Award** frame, click in the **Award** field and press **F7** on your keyboard. The Awards lookup screen appears.



4. Click **Add**. The New Award Table Entry screen appears.



New Award Table Entry

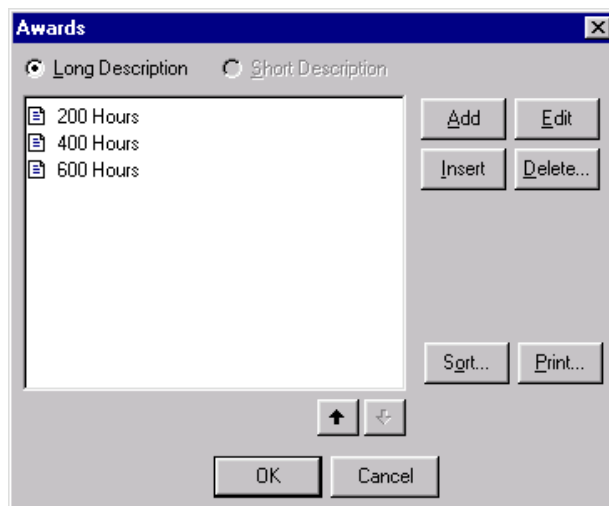
Description: 600 Hours

Min amount of service: 600 hour(s)

Inactive

OK Cancel

5. On the New Award Table Entry screen, in the **Description** field, enter “600 Hours”. This is the name/description of the next award John will potentially receive.
6. In the **Min amount of service** field, enter “600”. This is the number of hours John must work to attain the next award.
7. Do not mark the **Inactive** checkbox. You want this award to be active in your database.
8. Click **OK**. The award name/description appears in the box on the Awards lookup screen, along with any other awards that have been previously added.



Awards

Long Description Short Description

200 Hours
400 Hours
600 Hours

Add Edit
Insert Delete...

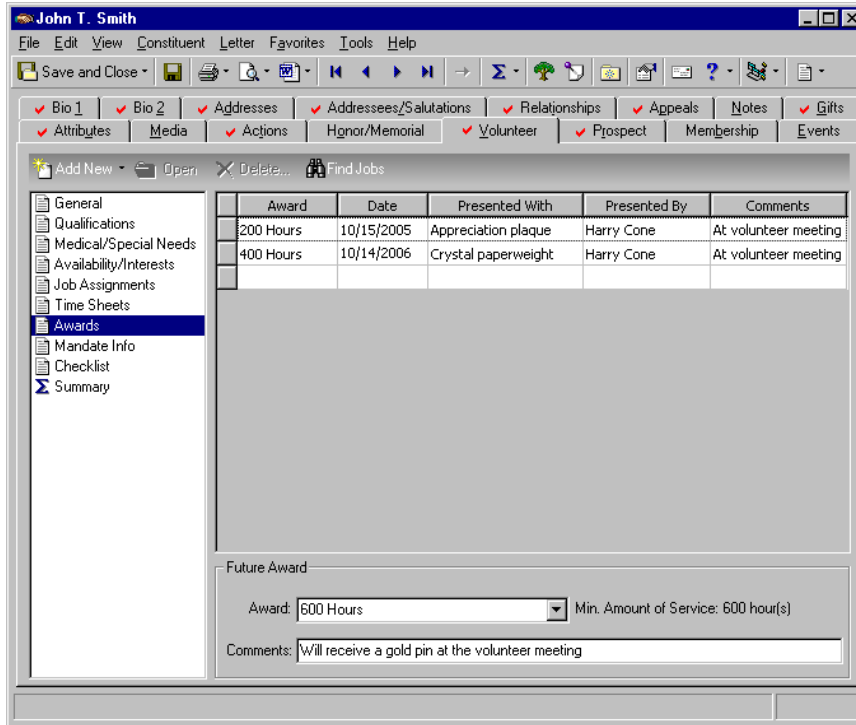
Sort... Print...

↑ ↓

OK Cancel

Note: When you add awards from the Awards lookup screen on any volunteer’s constituent record, the awards appear for selection in a drop-down list in the **Award** field of the Awards grid and in the **Award** field in the **Future Award** frame on the Volunteer tab of all your volunteers’ constituent records.

- On the Awards lookup screen, click **OK**. The 600 Hours award appears in the **Award** field of the **Future Award** frame. The number 600 defaults automatically in the **Min Amount of Service** field within the same frame. If you already set up your awards table from the **Tables** link of *Configuration*, you can simply select the name of the award in the **Award** field. The minimum amount of service will still appear on the right.



- In the **Comments** field of the **Future Award** frame, enter “Will receive a gold pin at the volunteer meeting”.
- To save the future award information and close John’s constituent record, click **Save and Close**.

Inactive Awards

There are times when you need to make a volunteer award inactive. Perhaps you gave out an award in the past. You decide you no longer want to give out the award, now or in the future. For historic purposes, you do not want to delete the award from the Volunteer tab of every constituent who ever received the award, but you do want to ensure the award is no longer added to anyone else’s record. By marking the award inactive, you can ensure the award is no longer added to any volunteers’ constituent records, from this point on. Although, we recommend for data entry consistency, you mark an award inactive from the **Tables** link of *Configuration*, you can mark an award inactive from the Volunteer tab, as well.

If you ever decide you want to use the inactive award again, you can make the inactive award active from the **Tables** link of *Configuration*. For information about the **Tables** link of *Configuration*, see the *Configuration & Security Guide*.

► Making awards inactive on the Volunteer tab

You can make awards inactive from the Awards grid. Select **Awards** from the list on the left to access the Awards grid. Although this procedure shows you how to make an award inactive on the Volunteer tab, we recommend for data entry consistency, you make awards inactive from the **Tables** link of *Configuration*. For more information about making awards inactive, see the *Configuration & Security Guide*.

Scenario: Your organization has an exceptional volunteer, Susan McDonald. Susan has won the 100 Hours outstanding service award, the 200 Hours outstanding service award, and the 400 Hours outstanding service award. It has come to your attention that your organization is no longer giving out the 100 Hours award. Mark this award as inactive on the Volunteer tab of Susan's constituent record.

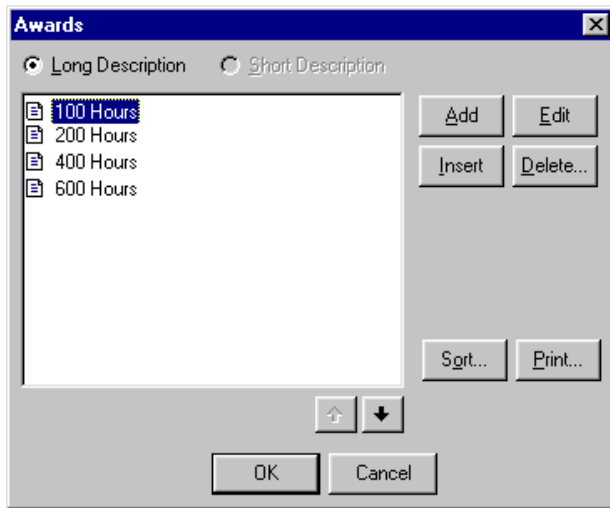
1. From Susan McDonald's constituent record, select the Volunteer tab. For information about opening a constituent record and accessing the Volunteer tab, see "Accessing the Volunteer tab of a constituent record" on page 8.
2. From the list on the left, select **Awards**. The Awards grid and **Future Award** frame appear on the right.

The screenshot shows the constituent record for Susan E. McDonald. The interface includes a menu bar (File, Edit, View, Constituent, Letter, Favorites, Tools, Help) and a toolbar with various icons. Below the toolbar is a navigation pane with tabs for Bio 1, Bio 2, Addresses, Addressees/Salutations, Relationships, Appeals, Notes, Gifts, Attributes, Media, Actions, Hgnor/Memorial, Volunteer, Prospect, Membership, and Events. The Volunteer tab is selected. On the left, a tree view shows categories like General, Qualifications, Medical/Special Needs, Availability/Interests, Job Assignments, Time Sheets, Awards (selected), Mandate Info, Checklist, and Summary. The main area displays an Awards grid with the following data:

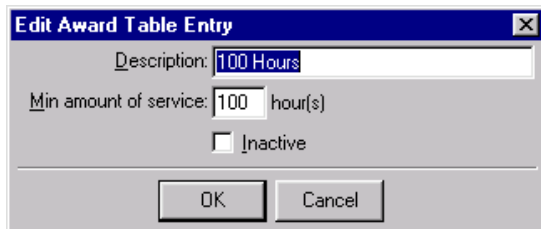
Award	Date	Presented With	Presented By	Comments
100 Hours	10/12/1999	Tee shirt	John Riddle	At volunteer meeting
200 Hours	11/15/2000	Appreciation plaque	Harry Cone	At volunteer meeting
400 Hours	09/06/2001	Crystal paperwei...	Harry Cone	At volunteer meeting

Below the grid is a 'Future Award' section with a dropdown menu for 'Award', a 'Min. Amount of Service' field, and a 'Comments' text area.

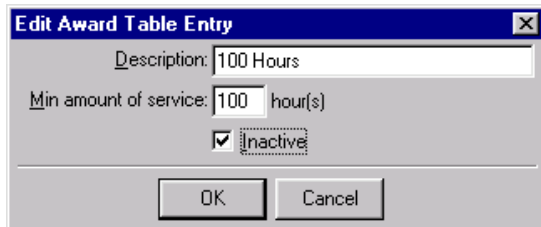
3. In the Awards grid, click in the **Award** column of the 100 Hours award row and press **F7** on your keyboard. The Awards lookup screen appears.



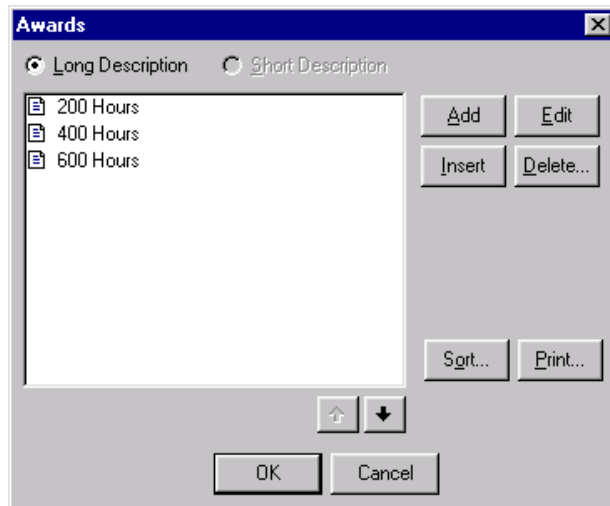
4. In the Awards box, select 100 Hours and click **Edit**. The Edit Award Table Entry screen appears.



5. Mark the **Inactive** checkbox.



6. Click **OK**. You return to the Awards lookup screen.



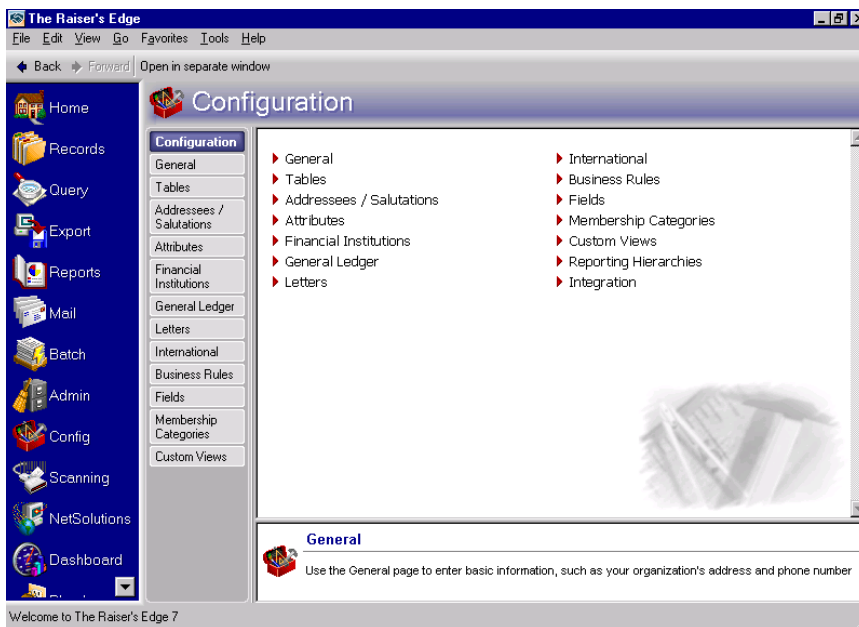
7. On the Awards lookup screen, click **Cancel**. You return to the Volunteer tab of Susan's constituent record. The 100 Hours award remains in the **Award** field for historic purposes, but you can no longer select the 100 Hours award in the **Award** field on the Volunteer tab of any constituent record. The award is now inactive.
8. To save the changes and close Susan's constituent record, click **Save and Close** on the toolbar.

► **Activating an inactive award**

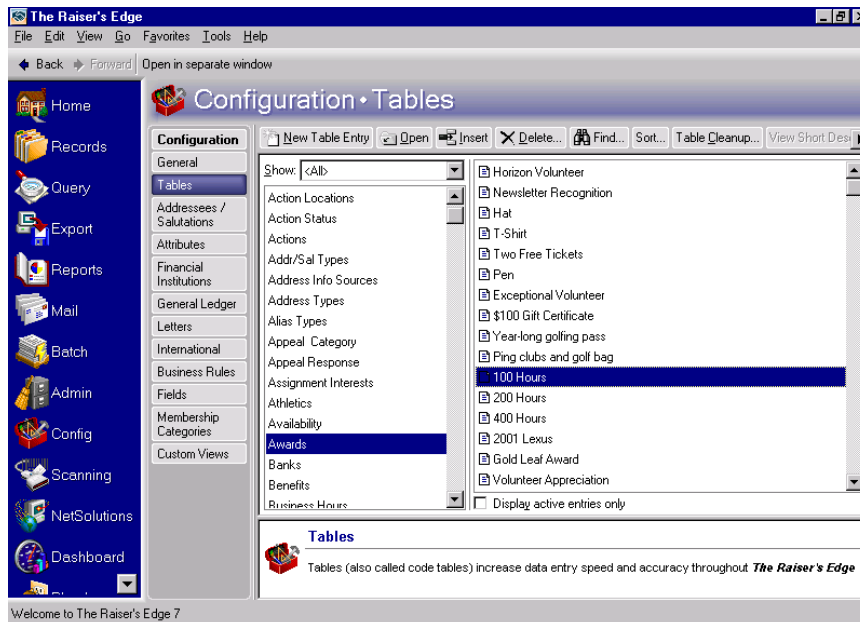
You can make an inactive award active again from the **Tables** link of *Configuration* if you have rights established from the **Security** link of *Configuration*. For more information, see the *Configuration & Security Guide*.

Scenario: Your organization gives out a 200 Hours service award, a 400 Hours service award, and a 600 Hours service award. A few years ago, you regularly gave out a 100 Hours service award. Feeling that your volunteers needed to strive for higher awards, you made the 100 Hours service award inactive. You now have several volunteers who would benefit by receiving the 100 Hours service award. You decide to make this inactive award active again.

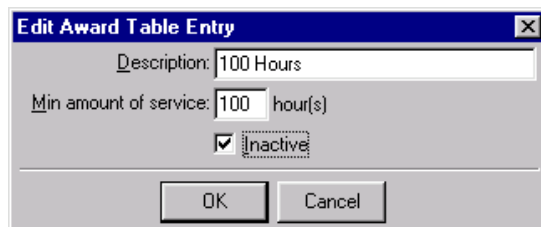
1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.



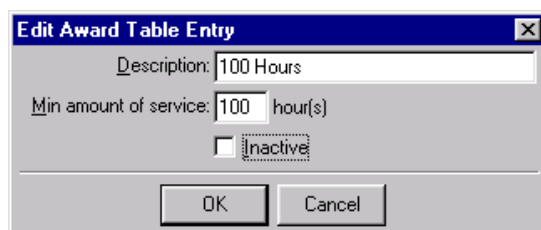
- Click the **Tables** link. A table list appears on the left and table entries appear on the right.



- From the list on the left, select **Awards**. Your award table entries appear on the right. The 100 Hours service award you previously made inactive appears in a lighter shade than the rest of the awards.
- Select the 100 Hours award and click **Open** on the action bar above the list. The Edit Award Table Entry screen appears with the **Inactive** checkbox marked.



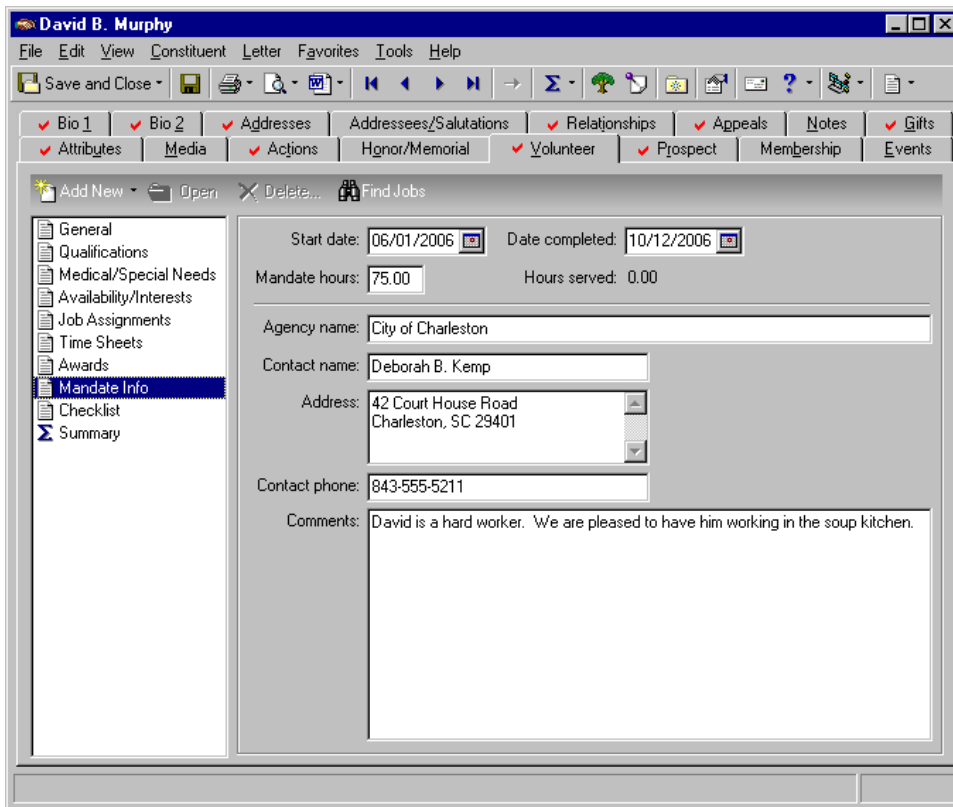
- On the Edit Award Table Entry screen, unmark the **Inactive** checkbox.



- Click **OK**. You return to the Configuration page and the award is active again. You can add it to the Volunteer tab of any of your volunteers' constituent records.

Volunteer Mandate Information

A mandate is an official order from a court or public agency requiring that an individual serve some type of volunteer duty. If your organization accepts volunteers who need to fulfill mandates, you can track such information as the date the volunteer starts his mandate service, how many hours he was ordered to serve, the date the volunteer fulfills the order, the agency's name who ordered the mandate, and the person at the agency you should contact with questions or concerns about the volunteer or the mandate. If you mark the **Apply time sheet toward required mandate hours** checkbox on each of the volunteer's time sheets, the program automatically keeps track of how many hours the mandated volunteer has served. Mandate information is tracked on the Volunteer tab of a constituent record.



The screenshot shows a software window titled "David B. Murphy" with a menu bar (File, Edit, View, Constituent, Letter, Favorites, Tools, Help) and a toolbar. Below the toolbar is a row of tabs: Bio 1, Bio 2, Addresses, Addressees/Salutations, Relationships, Appeals, Notes, Gifts, Attributes, Media, Actions, Honor/Memorial, Volunteer, Prospect, Membership, and Events. The "Volunteer" tab is selected. On the left is a tree view with categories: General, Qualifications, Medical/Special Needs, Availability/Interests, Job Assignments, Time Sheets, Awards, Mandate Info (selected), Checklist, and Summary. The main area displays the "Mandate Info" form with the following data:

- Start date: 06/01/2006
- Date completed: 10/12/2006
- Mandate hours: 75.00
- Hours served: 0.00
- Agency name: City of Charleston
- Contact name: Deborah B. Kemp
- Address: 42 Court House Road, Charleston, SC 29401
- Contact phone: 843-555-5211
- Comments: David is a hard worker. We are pleased to have him working in the soup kitchen.

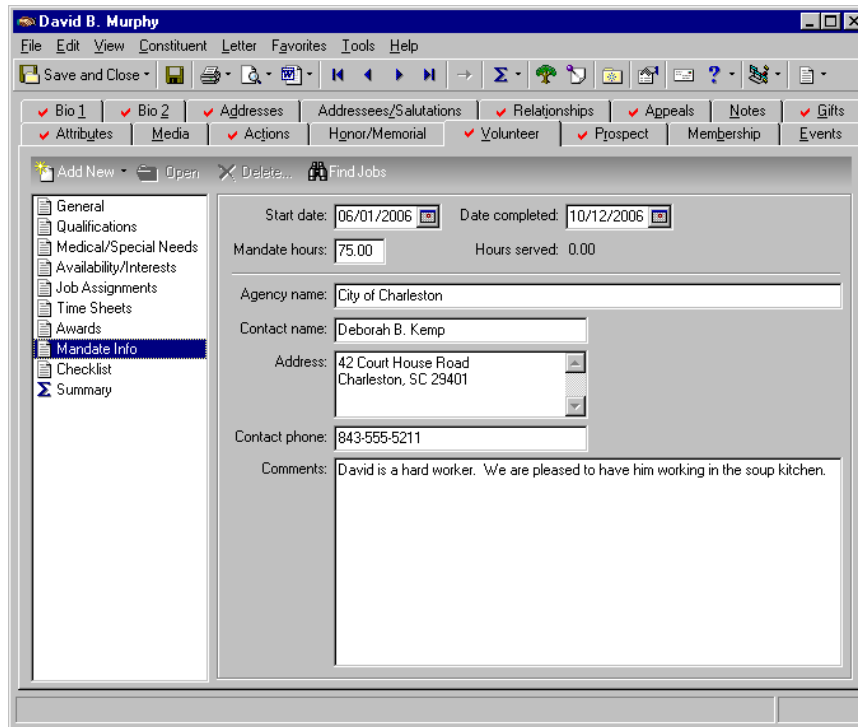
▶ Adding mandate information on the Volunteer tab

You can add volunteer mandate information by selecting **Mandate Info** from the list on the left of the Volunteer tab and entering information in the fields on the right.

Scenario: Your organization runs a homeless shelter. It has been established that you accept volunteers who need to fulfill a mandate ordered by a court or public agency. Recently, David Murphy was ordered by a city court to serve 75 hours of community service. He will serve his mandate by working in the soup kitchen of your organization for several hours every week until he fulfills his mandate. Add David's mandate information on the Volunteer tab of his constituent record.

1. From David Murphy's constituent record, select the Volunteer tab. For information about opening a constituent record and accessing the Volunteer tab, see "Accessing the Volunteer tab of a constituent record" on page 8.

- From the list on the left, select **Mandate Info**. The mandate fields appear on the right.



The screenshot shows a software window titled "David B. Murphy" with a menu bar (File, Edit, View, Constituent, Letter, Favorites, Tools, Help) and a toolbar. Below the toolbar is a navigation bar with tabs: Bio 1, Bio 2, Addresses, Addressees/Salutations, Relationships, Appeals, Notes, Gifts, Attributes, Media, Actions, Hgnor/Memorial, Volunteer, Prospect, Membership, Events. The "Mandate Info" tab is selected. The main area contains a form with the following fields:

- Start date: 06/01/2006
- Date completed: 10/12/2006
- Mandate hours: 75.00
- Hours served: 0.00
- Agency name: City of Charleston
- Contact name: Deborah B. Kemp
- Address: 42 Court House Road, Charleston, SC 29401
- Contact phone: 843-555-5211
- Comments: David is a hard worker. We are pleased to have him working in the soup kitchen.

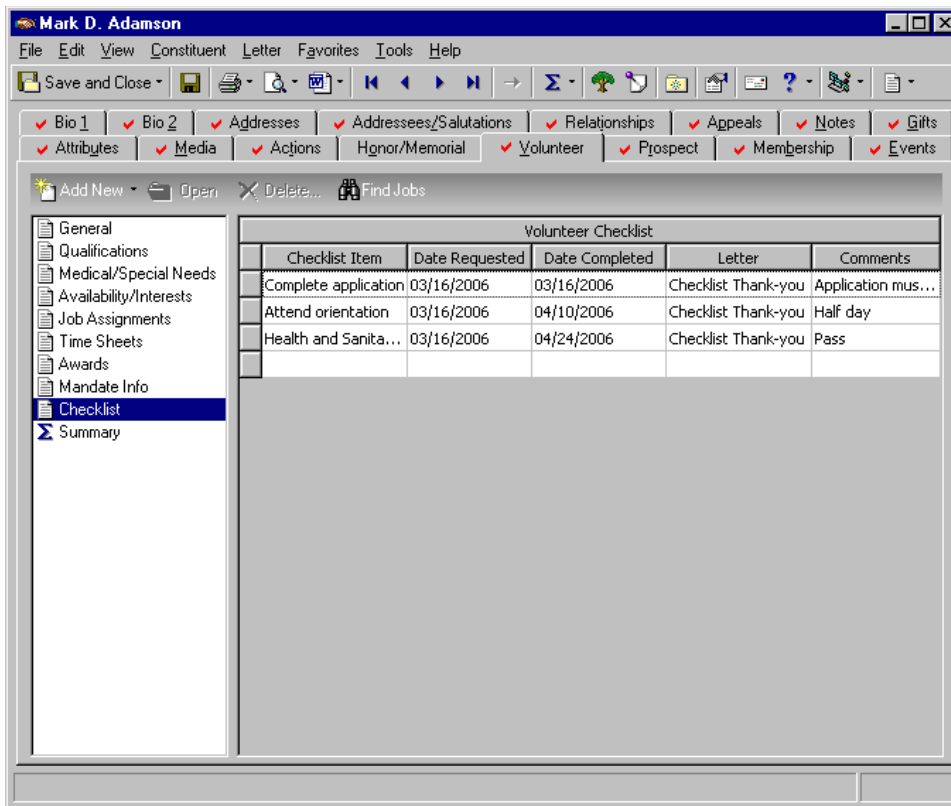
- In the **Start date** field, enter the date 06/01/2006. This is the date David starts work in the soup kitchen.
- In the **Date completed** field, enter the date 10/12/2006. Even though David has not finished working at your organization, you know when his last day will be. It is dictated by his mandate.

Note: The **Hours served** field is updated automatically when you mark the **Apply time sheet toward required mandate hours** checkbox on the time sheet record. Otherwise, **Hours served** remains 0. For more information about time sheets, see "Time Sheets on the Volunteer Tab" on page 54.

- In the **Mandate hours** field, enter "75". This is the number of hours the mandate requires David to work.
- In the **Agency name** field, enter "City of Charleston". This is the agency who requires David to serve the mandate.
- In the **Contact name** field, enter "Deborah B. Kemp". This is the person at the agency you should contact if you have questions about David or the mandate.
- In the **Address** field, enter "42 Court House Road Charleston, SC 29401".
- In the **Contact phone** field, enter the phone number 843-555-5211.
- In the **Comments** box, enter "David is a hard worker. We are pleased to have him working in the soup kitchen."
- To save the mandate information and close David's constituent record, click **Save and Close** on the toolbar.

Checklists on the Volunteer Tab

Checklists are the “to do” lists you assign to your volunteers. The list you create on the Volunteer tab of a constituent record contains the individual items you require a volunteer to complete before he can start a job. For example, your organization is an aquarium. Before a volunteer can start work at the aquarium, he must attend a volunteer training class, attend the Preserving Our Aquatic Environment seminar, and have a TB test. Checklists are important when determining the jobs a volunteer can actually be assigned. If the volunteer has not completed the checklist items, he should not be assigned to jobs having these same checklist requirements.



Note: If you use the **Find Jobs** button to automatically find jobs and assign them to a volunteer, the volunteer potentially qualifies for jobs that match her checklist items.

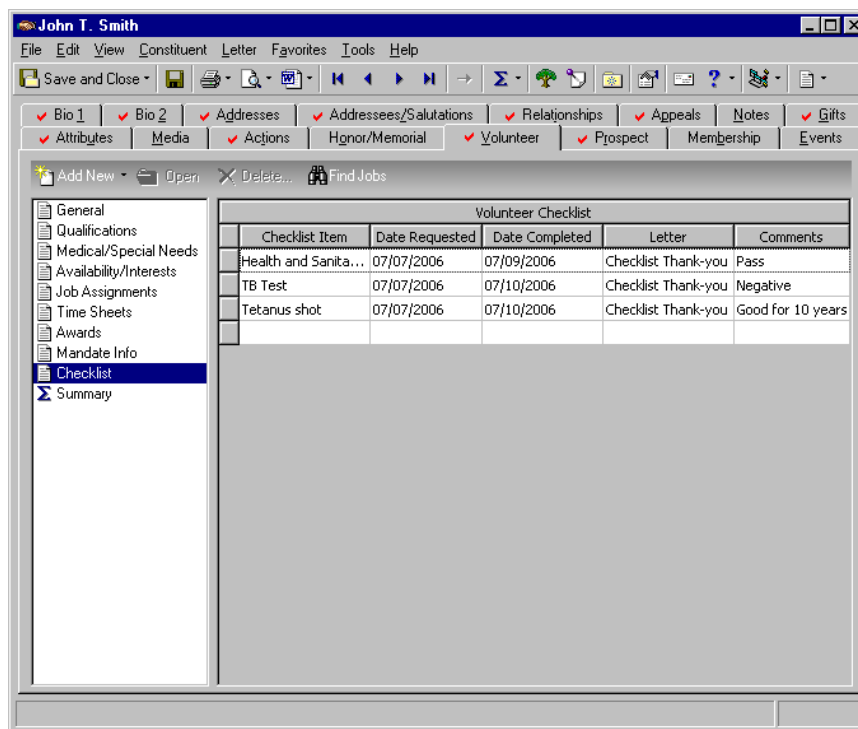
In the **Volunteer Checklist** grid, you can enter each **Checklist Item**. Beside each **Checklist Item**, you should enter the **Date Requested** and the **Date Completed**. If you decide to send a letter concerning the checklist item to your volunteer, you can enter the **Letter** type in the grid. Perhaps you send a Checklist thank-you letter after a volunteer has completed a checklist item. Or, you send out a Reminder letter letting the volunteer know when the checklist needs to be completed. Like many grids in *The Raiser's Edge*, you can enter any **Comments** you have concerning the volunteer and the particular checklist item.

► Adding checklist items on the Volunteer tab

You can add checklist items by selecting **Checklist** from the list on the left of the Volunteer tab and entering information in the **Volunteer Checklist** grid on the right.

Scenario: Your organization runs a homeless shelter and John Smith has volunteered to work twice a month in the soup kitchen. Before John can start his job in the soup kitchen, your organization requires he get a tetanus shot, a TB test, and attend a Health and Sanitation class. Track these checklist items in the **Volunteer Checklist** grid on the Volunteer tab of John's constituent record.

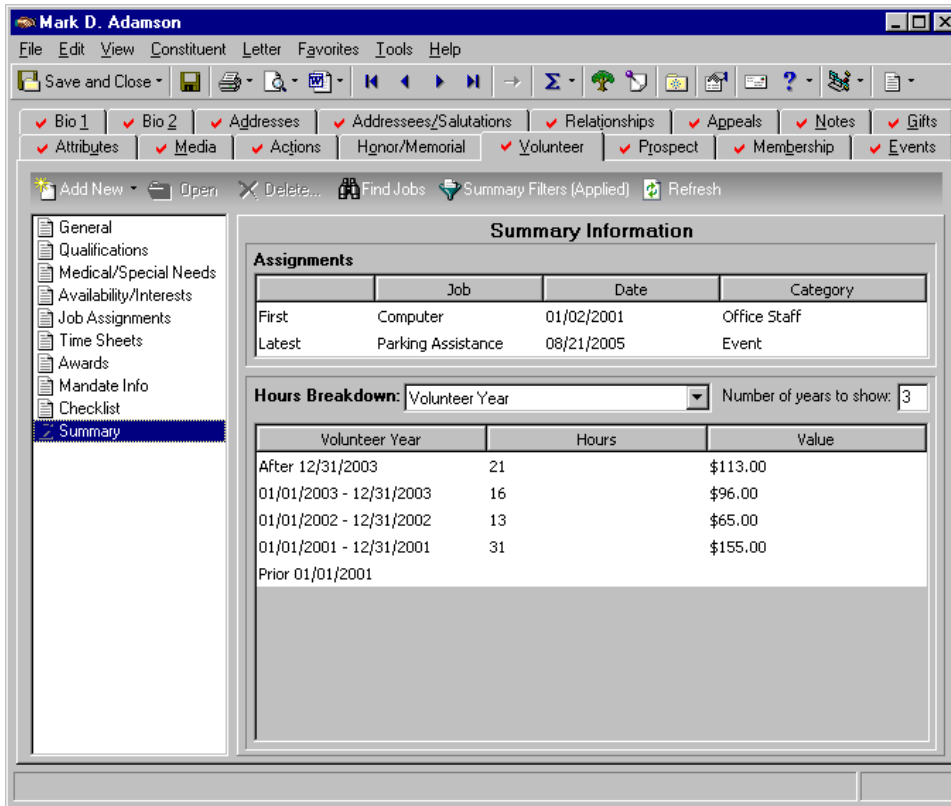
1. From John Smith's constituent record, select the Volunteer tab. For information about opening a constituent record and accessing the Volunteer tab, see "Accessing the Volunteer tab of a constituent record" on page 8.
2. From the list on the left, select **Checklist**. The **Volunteer Checklist** grid appears on the right.



3. In the **Volunteer Checklist** grid, select "Health and Sanitation class" in the **Checklist Item** column. This class must be taken by John before he can start work in the soup kitchen.
4. In the **Date Requested** column, enter the date 07/07/2006. This is the date you requested John take the class.
5. In the **Date Completed** column, enter the date 07/09/2006. This is the date John completed the class.
6. In the **Letter** field, enter "Checklist Thank You". You want to send John a thank-you letter for participating in the class.
7. In the **Comments** field, enter "Pass". This grading system for the Health and Sanitation class is Pass/Fail.
8. Repeat this procedure to add the TB test and Tetanus shot as shown in the previous picture.
9. To save the checklist items and close John's constituent record, click **Save and Close** on the toolbar.

Summary on the Volunteer Tab

On the Volunteer tab, you can quickly view a volunteer's summary information by selecting **Summary** from the list on the left of the tab. The Summary Information screen appears on the right.



You can use this summary to view information for a specific constituent's volunteer history. For example, in the **Assignments** grid, you can view a volunteer's first and latest job assignments. In the **Hours Breakdown** grid, you can view all hours worked by a volunteer. In the **Hours Breakdown** field above the grid, you can select how you want to view the hours broken down — by Volunteer Year, Job, Department, or Location. After you make your selection in the **Hours Breakdown** field, you must click **Refresh** on the action bar to see the updated information in the **Hours Breakdown** grid.

When you make your selection in the **Hours Breakdown** field, the following information changes in the **Hours Breakdown** grid:

Volunteer Year. If you select Volunteer Year, you can then enter the **Number of years to show** in the grid.

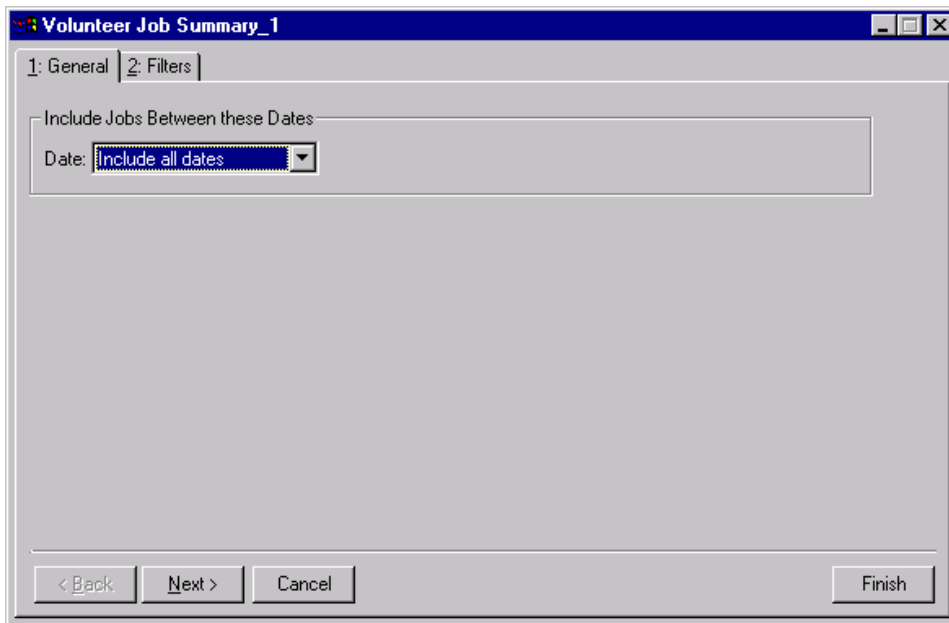
The screenshot shows a software interface with multiple overlapping windows for 'Mark D. Adamson'. The main window displays a 'Summary Information' section. Under 'Assignments', there is a table with columns for Job, Date, and Category. Below that, the 'Hours Breakdown' section has a dropdown menu set to 'Location' and a 'Number of years to show' field set to 12. The 'Hours Breakdown' table has columns for Location, Hours, and Value.

Location	Hours	Value
15 Franklin Avenue	37	\$201.00
24 High Water Street	8	\$48.00
25 Hampton Street	5	\$25.00
Star Mission Shelter	31	\$155.00

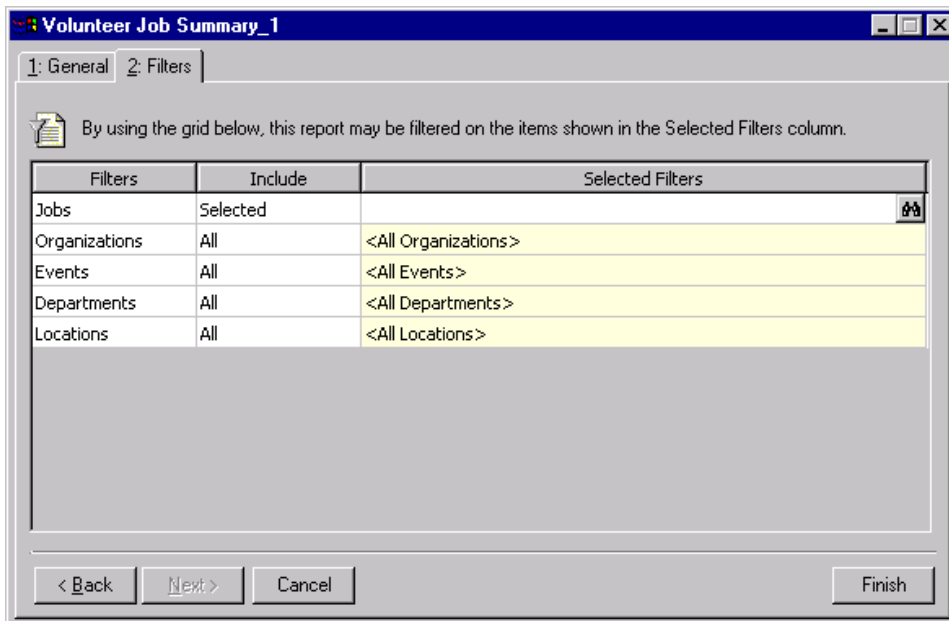
Job.
Department.
Location.

You can further filter what appears in the summary by selecting **Summary Filters** on the action bar above the grid. The Summary Filters screen appears with two tabs — the General tab and the Filters tab.

On the General tab, you can select to include jobs between certain dates. You can make your selection from the **Date** field within the **Include Jobs Between these Dates** frame.



On the Filters tab, you can choose to include All or Selected Jobs, Organizations, Events, Departments, and Locations. If you choose Selected by any of the choices, the binoculars appear so you can access the Open screen. From the Open screen, you can search your database for the jobs, organizations, events, departments, or locations you want to include.



When you finish including your selections, you return to the Summary Information screen on the Volunteer tab. On the Summary Information screen, you can right-click in the **Assignments** grid or the **Hours Breakdown** grid if you want to export the summary grid, export the summary grid to *Excel*, or print the summary information.

For detailed information about summaries, see the *Summaries Guide*.

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Volunteer Job Records

Jobs are the tasks, or miscellaneous pieces of work, assigned to the volunteers of your organization or to the volunteers of your organization's events. For example, your organization runs a homeless shelter. The homeless shelter runs smoothly, thanks to the endless help of volunteers from the community. You have volunteers who come in regularly to assist your office staff and others who work tirelessly in the soup kitchen. Medical volunteers run your health clinic and professional counselors volunteer countless hours helping guests regain their lives. You have teachers who spend time educating guests' children and ministers who stop by to offer services. All these tasks, or pieces of work volunteers perform for your organization, are volunteer jobs.

In *The Raiser's Edge*, the second part of the optional module *Volunteer Management* involves adding job records to your database. Each job record is composed of four tabs: the General tab, Details tab, Volunteers tab, and Job Attributes tab. The information you can enter on each tab is discussed in succession in this chapter.

When you add information on a job record, keep in mind you will later want to find the appropriate volunteers to assign to the job. You can automatically find volunteers and assign them to a job by using **Tools, Find Volunteers** from the menu bar of the job record. If you plan on using **Tools, Find Volunteers** to automatically find volunteers and assign them to the job, you should enter information on the job record and the Volunteer tab of your volunteers' constituent records consistently. If information on the Volunteer tab of your volunteer's constituent records does not match information on the job record, you can limit your ability to find volunteers. Automatically finding volunteers and assigning them to a job by using **Tools, Find Volunteers** from the menu bar of the job record is discussed later in this chapter.

General Information on the Job Record

Note: Once you add a job record to your database, you can view the properties of that job record by selecting **File, Properties** from the menu bar of the record. Properties tell you the date the record was added, the date the record was last changed, who added it, who last changed it, and the import ID.

When adding a job record to your database, the starting point is to enter a job name on the General tab. After you enter the name of the **Job**, you can continue to enter general job-related information on the same tab. General information includes such data as the **Category**, which is the group to which a job belongs. At your organization, you may have several jobs falling under a particular category. For example, at a homeless shelter, under the category of Homeless Shelter Staff, you may have a Soup Kitchen job, a Counseling job, a Data Entry job, and a Medical Staff job.

On a job record, you can enter a **Start Date** and **End Date** (if applicable). If a job is continuing indefinitely, you can leave the **End Date** blank. You can also track the job **Position**, which is the job title, or kind of work volunteers will be assigned to perform. Multiple positions can fall under a particular job. For example, serving positions, cooking positions, and cleaning positions may all fall under the Soup Kitchen job.

On a job record, you can also track the **Minimum Age** volunteers must be before you allow them to work on a job, a **Description** of the job, and whether your organization allows mandated volunteers to perform the job.

You can also enter a **Volunteer type**. Volunteer type denotes the kind of volunteers needed for a job. Entering a volunteer type can be useful. However, if you plan on using **Find Volunteers** from the menu bar of the job record to automatically find volunteers and assign them to a job, we recommend you enter a volunteer type only if a type is required by your organization. If volunteers can be one of several types to perform a job, you can actually eliminate volunteers when using **Find Volunteers** because the information becomes required criterion.

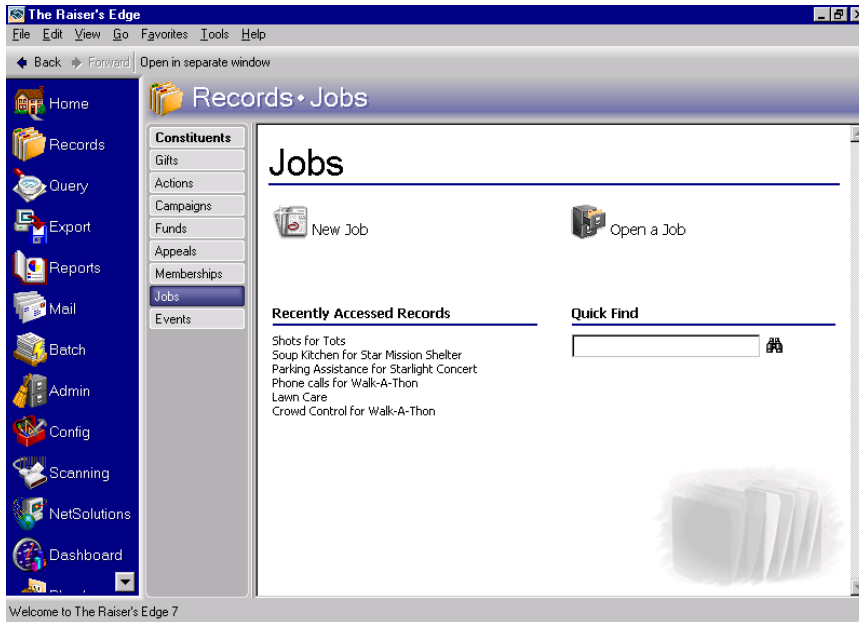
▶ Adding general information on the General tab of the job record

You can add jobs to your database from the **Jobs** button of *Records*.

Scenario: Your organization is a large museum. You have several volunteers who come to your museum throughout the week to work in the gift shop. Add the Gift Shop job to your database.

1. On the Raiser's Edge bar, click **Records**. The Records page appears.

2. Click the **Jobs** button. The Jobs page appears.



Note: If you use **Tools, Find Volunteers** to automatically find volunteers and assign them to a job, only volunteers with a start and end date range wide enough to encompass the start and end date on the job record will potentially qualify for the job.

3. Click **New Job**. The New Job screen appears.

4. Select the **General** tab. For information about how to open a job record, see “Opening a job record from the Jobs page of Records” on page 12.
5. In the **Job** field, enter “Gift Shop”. **Job** is the name of the area to which you can assign a volunteer.
6. In the **Category** field, select “Retail”. **Category** is the group to which a job belongs.
Several jobs may potentially exist at the museum and these jobs can all fall under the Retail **Category**. A “Book Shop” job may fall under the Retail **Category**. A “T-Shirt Booth” job may also fall under the Retail **Category**.
7. In the **Position** field, enter “Clerk”. This is the job title, or kind of work a volunteer will be assigned to do.

Several positions can potentially exist at the museum for the same job. An Inventory position, a Stock Room position, and a Maintenance position can all exist for the Gift Shop job.

Warning: If you plan on using **Tools, Find Volunteers** from the menu bar of the job record to automatically find volunteers and assign them to a job, we recommend you enter a **Volunteer type** on the Volunteer tab of the constituent record only if a type is required by your organization. If a volunteer can be one of several types to perform a job, you can actually eliminate volunteers when using this feature because the information in this column becomes required criteria.

8. In the **Volunteer type** field, select “Gift Shop Staff”. This field further breaks down the kind of volunteer needed for the job.
9. In the **Start date** field, enter the date “04/04/2006”.
10. Leave the **End date** field blank because the Gift Shop job will continue indefinitely.
You can enter the same date in the **Start date** and **End date** fields if a job lasts only one day.
11. In the **Minimum age** field, enter “18”. This field stipulates the age volunteers must be before the museum allows them to perform the job.
12. Mark the **Allow mandated volunteers** checkbox. This checkbox signifies the museum accepts volunteers who are required to serve some type of volunteer duty as directed by a court or public agency.
13. In the **Description** box, enter “Volunteers are responsible for running cash registers and serving customers.”

Warning: When a job is complete, you should mark the **Job completed** checkbox on the job record. When you mark the **Job completed** checkbox, the job becomes unavailable for selection when you use **Tools, Find Volunteers** on the job record to assign volunteers to the job or when you use the **Find Jobs** button on the Volunteer tab of a volunteer’s constituent record to assign jobs to a volunteer.

14. To save the general job information and close the job record, click **Save and Close** on the toolbar.

Linking a Job Record to An Organization Constituent Record

Not only can you track the job name and general information on the General tab of a job record, you also have the ability to link a job record to an organization constituent record that is already in your database.

The screenshot shows a dialog box with the following elements:

- A checked checkbox labeled "This Job is for an..."
- Two radio buttons: "Organization" (selected) and "Event".
- A text input field containing "Organization: Star Mission Shelter".
- A small icon (possibly a save or apply button) to the right of the text field.

Why is linking a job to an organization helpful? *Volunteer Management* is not only an excellent tool for nonprofits, it is also an excellent tool for organizations that encourage their members or employees to volunteer time to nonprofit organizations or philanthropic causes throughout the community. If you are this type of organization, you can better track where your members or employees are volunteering their time, if you link each job record to that organization.

For example, your organization is a church. Several members of your congregation voluntarily keep the children’s playgrounds of the city clean and in good repair. You can set up a Clean the City job in your database and link it to the organization; in this case, the organization is the Parks and Recreation department of your city. Linking a job to an organization helps you keep track of where your members are volunteering their time.

Before you can link a job record to an organization record, you must first add a job record to your database. If the organization constituent record to which you want to link the job record is not in your database, you must also add an organization constituent record. For more information about adding an organization constituent record, see the *Constituent Data Entry Guide*.

▶ **Linking a job record to an organization constituent record**

Note: From a job record that is linked to an organization record, you can go directly to the linked organization record. From the menu bar of the job record, select **Job, Go to**. The linked record opens for you to view or edit.

You can link a job to an organization constituent record from the General tab of the job record.

Scenario: Your company supports a program that encourages employees to volunteer their time to the nonprofit community. For every three hours worked by an employee at a nonprofit organization, you give one vacation hour to that employee. You have a group of employees who volunteer their time working at the gift shop of Midlands Historical Museum. Link the Gift Shop job to the museum's constituent record. For more information about adding a gift shop job, see "Adding general information on the General tab of the job record" on page 83.

1. From the Gift Shop job record, select the General tab. For information about opening a job record, see "Opening a job record from the Jobs page of Records" on page 12.

The screenshot shows a software window titled "Gift Shop" with a menu bar (File, Edit, Job, Favorites, Tools, Help) and a toolbar. The "General" tab is active. The form contains the following fields and options:

- Job: Gift Shop
- Position: Clerk
- Category: Retail
- Volunteer type: Gift Shop Staff
- Start date: 04/04/2006
- Minimum age: 18
- End date: (empty)
- Allow mandated volunteers
- Job completed
- This Job is for an...
 - Organization
 - Event
- Organization: (empty text box)
- Description: Volunteers are responsible for running cash registers and serving customers.

2. Mark the **This Job is for an** checkbox and select the **Organization** option.

- Click the binoculars in the **Organization** field to access the Open screen where you can search for Midlands Historical Museum. When you select the museum from the Open screen, the organization name appears automatically in the **Organization** field and the job is linked. For more information about the Open screen, see the *Program Basics Guide*.

- To save the link and close the job record, click **Save and Close** on the toolbar.

Linking a Job Record to an Event Record

Not only can you track the job name and general information on the General tab of a job record, you also have the ability to link the job record to an event record that is already in your database.

Why is linking a job record to an event record helpful? If you use *Event Management*, you can create jobs specifically tailored to the events you host. You may not normally use these jobs on a day-to-day basis. For example, your organization is a health research organization and you are hosting a large tennis tournament with proceeds going toward childhood disease prevention. At your organization's main office, you have volunteers who come in on a regular basis to help the office staff with data entry, filing, and newsletter preparation. In your database, you have jobs set up to accommodate these day-to-day tasks. When you prepare for the tennis tournament, a multitude of extra jobs arise that need to be accomplished before and during the tournament. The demand for volunteers increases dramatically. It is helpful to add volunteer jobs specific to the tennis tournament and link each job to the tennis tournament event record. By doing so, you not only keep the event jobs separated from your day-to-day jobs, you prevent confusion when actually assigning the event jobs to your volunteers because you can select only from a list of jobs linked to the tennis event record.

Before you can link a job record to an event record, you must first add a job record to your database. If the event record to which you want to link the job record is not in your database, you must also add an event record. For more information about adding an event record, see the *Event Management Data Entry Guide*.

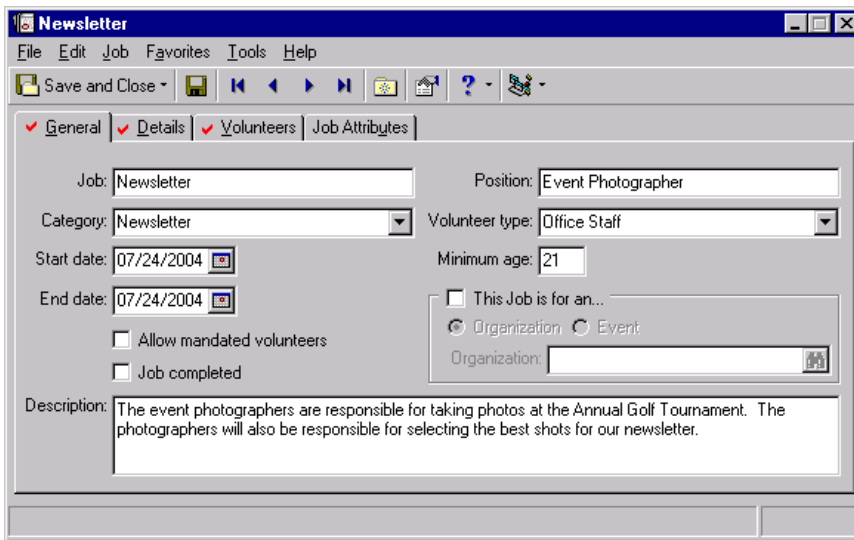
► Linking a job record to an event record

Note: From a job record that is linked to an event record, you can go directly to the linked event record. From the menu bar of the job record, select **Job, Go to**. The linked record opens for you to view or edit.

You can link a job record to an event record from the General tab of the job record. If you want to use **Tools, Find Volunteers** from the menu bar of a job record to automatically find volunteers and assign them to an event job, the job must be linked to the event record.

Scenario: Your organization provides meals to the elderly people of the community. You are hosting a golf tournament to raise money for this important community service. Several people volunteered to work with your newsletter staff. These volunteers will take photographs at the tournament and will also select the best photographs for your newsletter. Link the Newsletter job to the golf tournament event record. If a Newsletter job record is not in your database, see “Adding general information on the General tab of the job record” on page 83.

1. From the Newsletter job record, select the General tab. For information about opening a job record, see “Opening a job record from the Jobs page of Records” on page 12.



The screenshot shows a software window titled "Newsletter" with a menu bar (File, Edit, Job, Favorites, Tools, Help) and a toolbar. The "General" tab is selected. The form contains the following fields and options:

- Job: Newsletter
- Position: Event Photographer
- Category: Newsletter (dropdown)
- Volunteer type: Office Staff (dropdown)
- Start date: 07/24/2004 (calendar icon)
- End date: 07/24/2004 (calendar icon)
- Minimum age: 21
- Allow mandated volunteers
- Job completed
- This Job is for an...
 - Organization
 - Event
- Organization: (text field with search icon)
- Description: The event photographers are responsible for taking photos at the Annual Golf Tournament. The photographers will also be responsible for selecting the best shots for our newsletter.

2. Mark the **This Job is for an** checkbox and select the **Event** option.

3. In the **Event** field, click the binoculars to access the Open screen where you can search for the golf tournament. When you select the golf tournament from the Open screen, the event name appears automatically in the **Event** field and the job is linked. For more information about the Open screen, see the *Program Basics Guide*. For more information about adding an event record to your database, see the *Event Management Data Entry Guide*.

4. To save the link and close the job record, click **Save and Close** on the toolbar.

Details on the Job Record

On the Details tab of a job record, you can track the skills, experience, courses, and training volunteers must have to qualify, or be accepted, for the job. You can list medical information and then special needs which eliminate volunteers from being assigned to the job. You can enter volunteer attributes as criteria to include or not include volunteers for the job, enter assignment interests to match with your volunteers' own interests, and enter checklist items which must be completed by volunteers before they actually start the job.

Description	Skill Level	License Type
Medical Professional	Nurse	RN

Course Name	Certification
Heart Rescue Course	CPR

The Details tab of the job record contains a list of four detail items on the left. When you make a selection from the list, corresponding grids appear on the right.

- When you select **Qualifications** from the list on the left, the **Volunteer Skills and Experience Required** and **Volunteer Courses and Training Required** grids appear on the right.
- When you select **Medical/Special** from the list on the left, the **Medical Information Required** and **Do Not Assign Volunteers Needing** grids appear on the right.
- When you select **Volunteer Attributes** from the list on the left, the **Include Volunteers with these Attributes** and **Exclude Volunteers with these Attributes** grids appear on the right.
- When you select **Interests/Checklist** from the list on the left, the **Assignment Interests** and **Checklist Item** grids appear on the right.

Each of these grids will be discussed in order in this section of the chapter.

When you add information in the grids on the Details tab of a job record, keep in mind you will later want to find appropriate volunteers to assign to the job. As mentioned earlier, you can automatically find volunteers and assign them to the job by using **Tools, Find Volunteers** from the menu bar of the job record. If you plan on using **Tools, Find Volunteers** to automatically find volunteers and assign them to the job, you should enter information on the Details tab of the job record and the Volunteer tabs of your volunteers' constituent records consistently. If the information you add on the Details tab of the job record does not match information on the Volunteer tabs of your volunteers' constituent records, you can limit your ability to find volunteers.

Following is a list of grids on the job record that parallel, or reflect, the grids on a volunteer's constituent record. These are the grids where you should enter information consistently:

- Information in the **Volunteer Skills and Experience Required** and **Volunteer Courses and Training Required** grids on the job record should match information in the **Skills and Experience** and **Courses and Training** grids on the Volunteer tab of a volunteer's constituent record.
- Information in the **Medical Information Required** and **Do Not Assign Volunteers Needing** grids on the job record should match information in the **Medical Information** and **Special Needs** grids on the Volunteer tab of a volunteer's constituent record.
- Attributes in the **Include Volunteers with these Attributes** and **Exclude Volunteers with these Attributes** grids on the job record should match attributes listed in the Attributes grid on the Attributes tab of a volunteer's constituent record.
- Information in the **Assignment Interests** and **Checklist Item** grids on the job record should match information in the **Assignment Interests** and **Volunteer Checklist** grids on the Volunteer tab of a volunteer's constituent record.

Job Qualifications on the Details Tab of the Job Record

Qualifications are the skills, experience, courses, and training a volunteer must have to qualify, or be accepted, as a volunteer for the jobs at your organization. For example, your humanitarian organization sponsors a program where you build homes for families in need. You set up a carpentry job, a plumbing job, a roofing job, and a painting job. On the Details tab of each of these job records, you list the specific skills the job requires.

Perhaps you require specific courses for each of the jobs listed previously. Or, you require that volunteers take a Construction Safety course and a Basic First Aid class before being assigned to any job. On the Details tab of each of the job records, you also list the course requirements and the dates the courses were taken.

If you later use **Tools, Find Volunteers** on the job record to automatically find volunteers and assign them to the job, volunteers who have the same skills and courses listed on the Volunteer tab of their constituent record will potentially qualify for the job.

Skills and Experience on the Job Record

On a job record, you can track the skills and experience the job requires in the **Volunteer Skills and Experience Required** grid. In the grid, you should enter a **Description** of the skills or experience. Perhaps the job requires volunteers who are medical professionals and have specialized training. Perhaps the job requires volunteers who have photography, editing, computer networking, or data entry skills. Your organization may also have jobs requiring professional volunteers with CPR and lifesaving skills or volunteers with foreign language skills.

Volunteer Skills and Experience Required		
Description	Skill Level	License Type
Medical professional	Nurse	RN

After you enter a **Description**, you should enter a **Skill Level**. Skill levels can range from expert, professional, and highly skilled to minimally skilled. If you are entering experience such as medical training, you may want to enter a **License Type**. For example, you can include RN or LPN if you are entering a license type for a nurse.

► **Adding required skills and experience on the Details tab of the job record**

You can add skills and experience requirements on a job record by selecting **Qualifications** from the list on the left and entering information in the **Volunteer Skills and Experience Required** grid on the right.

Scenario: Your health organization is promoting Health Awareness Week by offering free blood pressure screenings to the community. Because this is such a beneficial community service, several nurses have volunteered to take blood pressures at the screening. Your organization has strict requirements for finding volunteers for this job. First, the volunteers need to be medical professionals. In the past, more nurses volunteered for this type of job, so you prefer to ask nurses. You want nurses with an RN or LPN license type. From the Health Awareness job record, add the skills and experience requirements of the job. If a Health Awareness job record is not in your database, see “Adding general information on the General tab of the job record” on page 83.

1. From the Health Awareness job, select the Details tab. For information about opening a job record, see “Opening a job record from the Jobs page of Records” on page 12.

Note: If an entry does not exist in a drop-down list in a field where you must make a selection, you can always type your entry directly into the field if you have security rights established. A message appears, asking if you want to add the entry to that table. Select **Yes**. Even though you can add a table entry from a field with a drop-down list, for data entry consistency, we recommend you establish your table entries from the **Tables** link of *Configuration*. For information about setting up tables, see the *Configuration & Security Guide*.

2. Select **Qualifications** from the list on the left. The **Volunteer Skills and Experience Required** and **Volunteer Courses and Training Required** grids appear on the right.

Volunteer Skills and Experience Required		
Description	Skill Level	License Type
Medical Professional	Nurse	RN

Volunteer Courses and Training Required	
Course Name	Certification
Heart Rescue Course	CPR

3. In the **Volunteer Skills and Experience Required** grid, select “Medical professional” in the **Description** column. The **Description** denotes the skills and experience a volunteer must have before being assigned to this job.
4. On the same row, in the **Skill Level** column, select “Nurse”. “Nurse” further defines the skill.
5. On the same row, in the **License Type** column, select “RN”. This is the type of license required for the job.
6. To save the information and close the job record, click **Save and Close** on the toolbar.

Courses and Training on the Job Record

On a job record, you can track the job's required courses and training in the **Courses and Training Required** grid. In this grid, you should enter a **Course Name**. Perhaps a volunteer needs to take your Volunteer Orientation, Health and Sanitation, or Local History class before being assigned to a job. Or, a volunteer needs to take a Heart Rescue or Advanced Lifesaving course. If a **Certification** is presented after completion of the required course, you should enter it beside the **Course Name**.

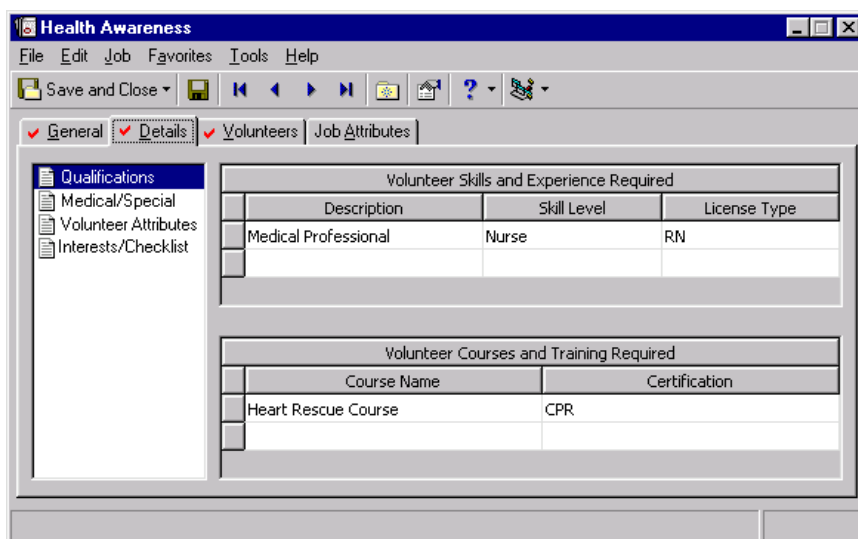
Volunteer Courses and Training Required	
Course Name	Certification
Heart Rescue Course	CPR

▶ Adding required courses and training on the Details tab of the job record

You can add courses and training requirements on a job record by selecting **Qualifications** from the list on the left and entering information in the **Volunteer Courses and Training Required** grid on the right.

Scenario: Your health organization is promoting Health Awareness Week by offering free blood pressure screenings to the community. Several practitioners have volunteered to take blood pressures at the screening. Your organization requires that all practitioners be CPR certified. This provides a high level of medical assuredness for the people who come to have their blood pressure checked. From the Health Awareness job record, add the course and training requirements of the job. If a Health Awareness job record is not in your database, see "Adding general information on the General tab of the job record" on page 83.

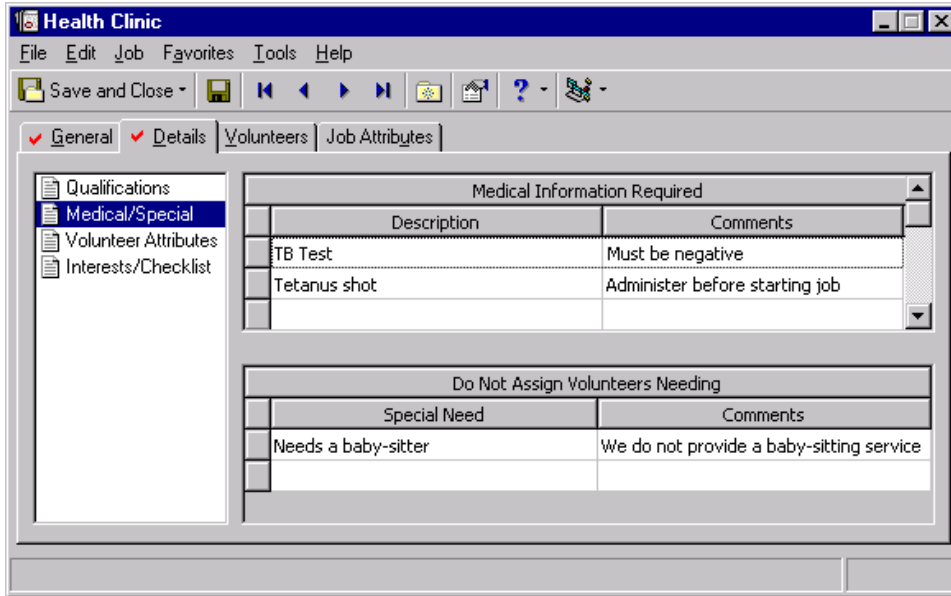
1. From the Health Awareness job, select the Details tab. For information about opening a job record, see "Opening a job record from the Jobs page of Records" on page 12.
2. Select **Qualifications** from the list on the left. The **Volunteer Skills and Experience Required** and **Volunteer Courses and Training Required** grids appear on the right.



3. In the **Volunteer Courses and Training Required** grid, select "Heart Rescue Course" in the **Course Name** column.
4. On the same row, in the **Certification** column, select "CPR".
5. To save the information and close the job record, click **Save and Close** on the toolbar.

Medical Information and Special Needs on the Details Tab of the Job Record

Certain medical information may be required for the volunteer jobs at your organization. Perhaps your health organization requires volunteers to have a TB test and a tetanus shot before they can start performing any jobs at the health clinic. On the Details tab of the Health clinic job, you enter the names of the required immunization and test in the **Medical Information Required** grid. As each volunteer complies with your requirements, you track the exact immunization and test names and the dates the immunization and test were administered in the **Medical Information** grid on the Volunteer tab of their constituent records. If you later use **Tools, Find Volunteers** on the job record to find volunteers and assign them to the Health Clinic job, the volunteers who have the exact immunization and test names listed in both of these grids will potentially qualify for the job.



Certain jobs at your organization have restrictions concerning volunteer special needs. For example, your health organization is sponsoring a walk-a-thon. You usually provide a baby-sitting service at your events, but you are not providing this service for the walk-a-thon. To prevent volunteers from being assigned to the individual jobs you create for the walk-a-thon, you enter "Needs a baby-sitter" in the **Do Not Assign Volunteers Needing** grid on the Details tab of each job record. Susan McDonald, a volunteer with your organization, lets you know she needs you to provide a baby-sitting service before she can volunteer her time at the event. When she let you know of her special needs, you entered "Needs a baby-sitter" in the **Special Needs** grid on the Volunteer tab of her constituent record. By entering the exact special needs in these two grids, Susan will potentially be eliminated if you later use **Tools, Find Volunteers** on the walk-a-thon job records to find volunteers and assign them to these jobs.

Required Medical Information on the Job Record

On a job record, you can track the job's required medical information in the **Medical Information Required** grid. In this grid, you should enter a **Description**. Perhaps the job requires that volunteers have a physical examination, a TB test, or hepatitis vaccination before they can start the job. If the job takes place in a foreign country, perhaps additional vaccinations or medical procedures are needed. After you enter a **Description**, you can enter any **Comments** concerning the job requirements.

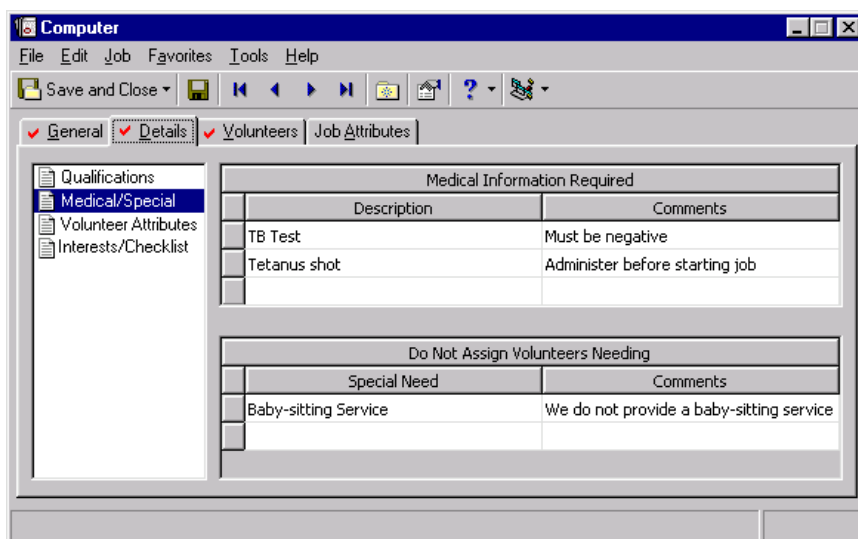
Medical Information Required	
Description	Comments
TB Test	Must be negative
Hepatitis vaccination	Administer before starting job

► **Adding required medical information on the Details tab of the job record**

You can add medical information requirements on a job record by selecting **Medical/Special** from the list on the left and entering information in the **Medical Information Required** grid on the right.

Scenario: Your organization is an aquarium. You have volunteers who come in during the week to assist the office staff with computer data entry. Before volunteers can initially start work at the aquarium, you require they have a TB test and a tetanus shot. From the Computer job record, add the medical information requirements of the job. If a Computer job record is not in your database, see “Adding general information on the General tab of the job record” on page 83.

1. From the Computer job, select the Details tab. For information about opening a job record, see “Opening a job record from the Jobs page of Records” on page 12.
2. Select **Medical/Special** from the list on the left. The **Medical Information Required** and **Do Not Assign Volunteers Needing** grids appear on the right.



3. In the **Medical Information Required** grid, select “TB test” in the **Description** column.
4. On the same row, in the **Comments** column, enter “Must be negative”.
5. On the next row, in the **Description** column, select “Tetanus shot”.
6. On that same row, in the **Comments** column, enter “Administer before starting job”.
7. To save the information and close the job record, click **Save and Close** on the toolbar.

Volunteer Special Needs on the Job Record

On a job record, you can track special needs in the **Do Not Assign Volunteers Needing** grid. Perhaps particular volunteers need transportation to and from a job site before they can volunteer. For certain jobs, you offer no transportation. Perhaps physically challenged volunteers need wheelchair access, but a certain job takes place at a site where no wheelchair access exists. After you enter a **Special Need**, you can enter additional **Comments** concerning the special needs.

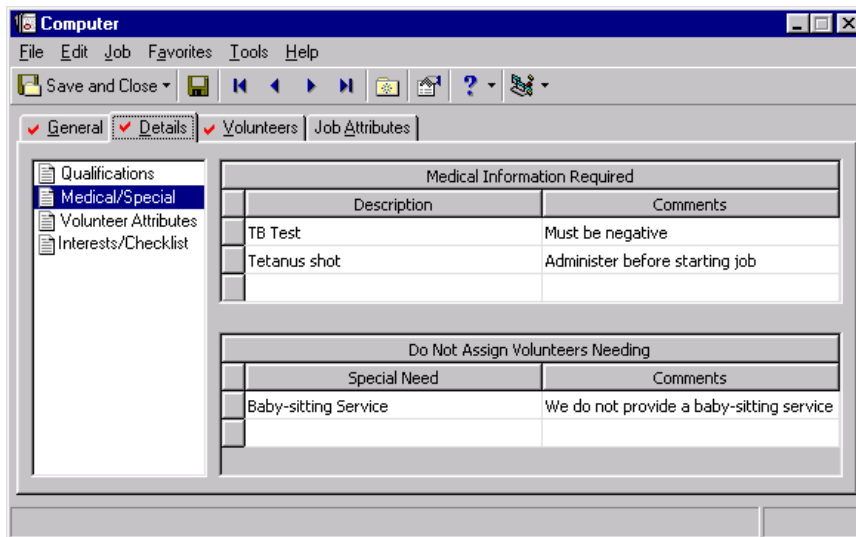
Do Not Assign Volunteers Needing	
Special Need	Comments
Transportation	We do not provide transportation to the job site.

▶ Adding volunteer special needs on the Details tab of the job record

You can add volunteer special needs on a job record by selecting **Medical/Special** from the list on the left and entering information in the **Do Not Assign Volunteers Needing** grid on the right. This becomes important when you automatically assign volunteers to a job and need to eliminate volunteers who have special needs.

Scenario: Your organization is an aquarium. You have volunteers who come in during the week to assist the office staff with computer data entry. Several volunteers in your organization can volunteer only if you provide a baby-sitting service. You do not provide a baby-sitting service for the computer job. From the Computer job record, enter the baby-sitting service on the job record so you can eliminate the volunteers with this special need. If a Computer job record is not in your database, see “Adding general information on the General tab of the job record” on page 83.

1. From the Computer job, select the Details tab. For information about opening a job record, see “Opening a job record from the Jobs page of Records” on page 12.
2. Select **Medical/Special** from the list on the left. The **Medical Information Required** and **Do Not Assign Volunteers Needing** grids appear on the right.



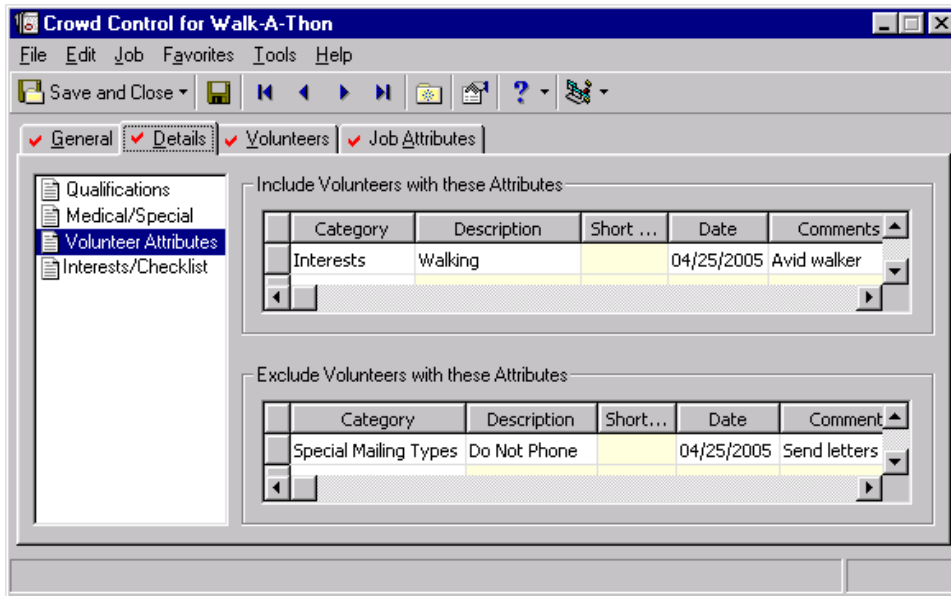
3. In the **Do Not Assign Volunteers Needing** grid, select “Baby-sitting Service” in the **Special Need** column.
4. On the same row, in the **Comments** column, enter “We do not provide a baby-sitting service.”
5. To save the information and close the job record, click **Save and Close** on the toolbar.

Volunteer Attributes on the Details Tab of the Job Record

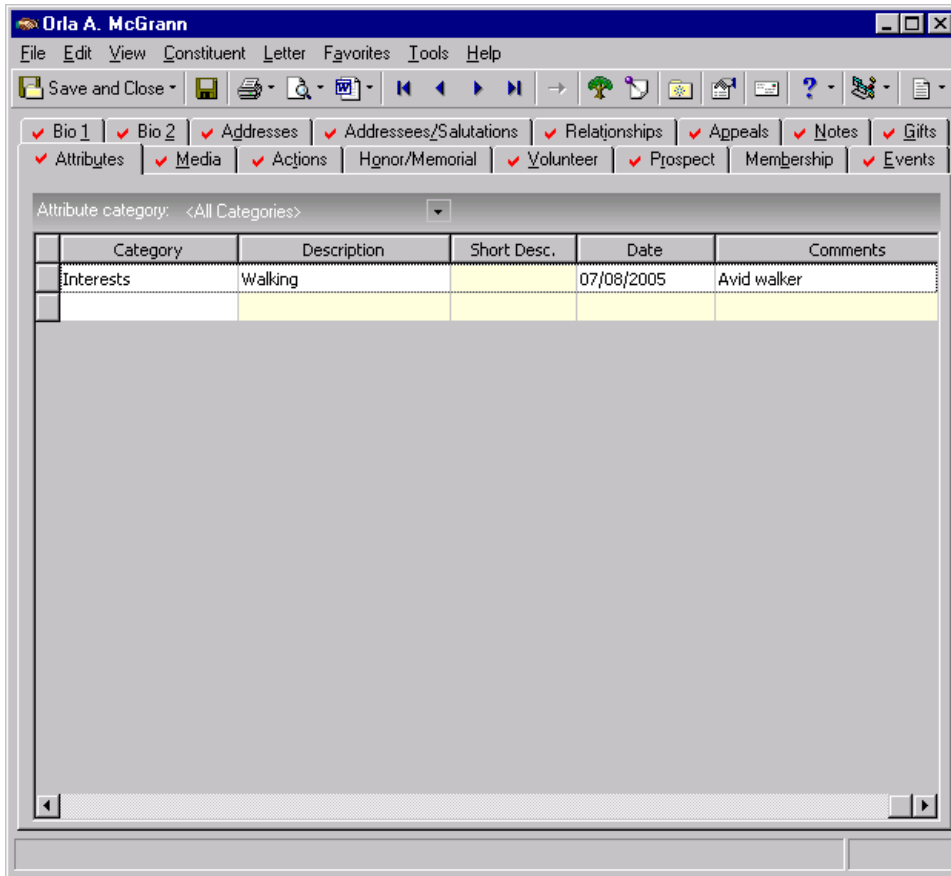
Note: You can also use volunteer attributes to include and exclude jobs if you use the **Find Jobs** button on the Volunteer tab of a volunteer’s constituent record to find jobs and assign them to the volunteer.

You can add volunteer attributes to the Details tab of a job record. These attributes help you include or exclude volunteers when you find volunteers and assign them to the job. Using volunteer attributes is especially helpful if you use **Tools, Find Volunteers** on the job record to automatically find volunteers and assign them to a job.

For example, your conservation organization is hosting a walk-a-thon to raise money for your Save the Beaches campaign. On the day of the event, you need many volunteers to help with directions and keep the crowd walking on the right track. You want to assign the right volunteers to the job, so you need to make sure the volunteers have an interest in walking. On the Details tab of the Crowd Control job, you list an attribute with a **Category** of Interests and a **Description** of Walking in the **Include Volunteers with these Attributes** grid.



A while back, Orla McGrann, a volunteer at your organization, told you that walking was one of her favorite fitness activities. You entered her interest in walking on the Attributes tab of her constituent record.



Because the attribute on the Details tab of the Crowd Control job record exists as an attribute on the Attributes tab of Orla's constituent record, you will potentially be able to find Orla and assign her to the Crowd Control job when using **Tools, Find Volunteers**.

If you want to exclude particular volunteers from a job, when using **Tools, Find Volunteers** from the menu bar of the job record, attributes listed in the **Exclude Volunteers with these Attributes** grid on the Details tab of a job record must also exist on the Attributes tab of the volunteers' constituent records. If the attributes you enter in the **Exclude Volunteers with these Attributes** grid exist on the volunteers' Attributes tabs, the volunteers will potentially be eliminated.

Including Volunteers with Volunteer Attributes

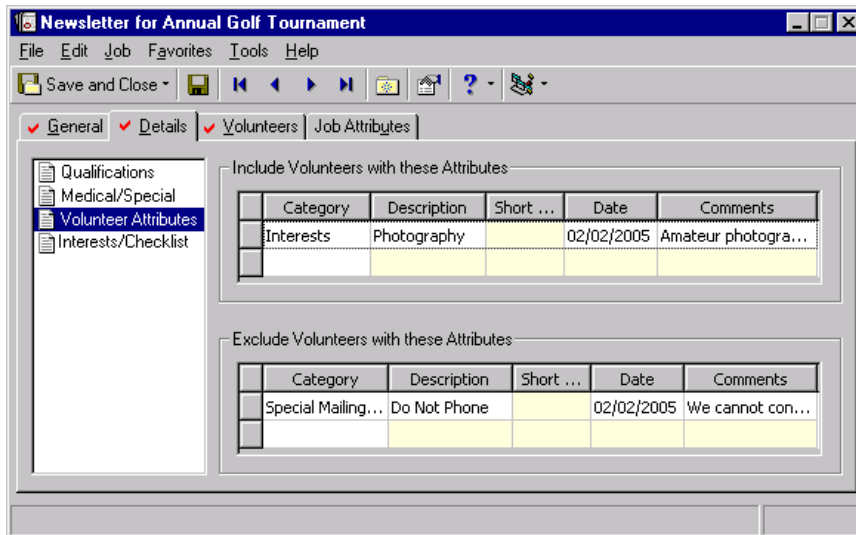
You can include volunteers with particular attributes by selecting **Volunteer Attributes** from the list on the left of the job record and entering information in the **Include Volunteers with these Attributes** grid on the right.

- Include Volunteers with these Attributes					
	Category	Description	Short ...	Date	Comments
	Interests	Cooking		03/13/2005	Excellent cook

► **Including volunteers with volunteer attributes**

Scenario: Your organization provides meals to the elderly people of the community. You are hosting a golf tournament to raise money for this important community service. You need volunteers to assist the newsletter staff in taking photographs at the tournament. When you find volunteers and assign them to the Newsletter job, you want to include those who expressed an interest in photography. This information is listed on the Attributes tab of their constituent records. From the Newsletter job record, enter an attribute with the **Category** of Interests and a **Description** of Photography on the Details tab of the job record. If a Newsletter job record is not in your database, see “Adding general information on the General tab of the job record” on page 83.

1. From the Newsletter job, select the Details tab. For information about opening a job record, see “Opening a job record from the Jobs page of Records” on page 12.
2. Select **Volunteer Attributes** from the list on the left. The **Include Volunteers with these Attributes** and **Exclude Volunteers with these Attributes** grids appear on the right.



3. In the **Include Volunteers with these Attributes** grid, select “Interests” in the **Category** column.
4. On the same row, in the **Description** column, select “Photography”.
5. On the same row, leave the **Short Desc** column blank because a short description was not used with this attribute.
6. On the same row, in the **Date** column, enter today’s date.
7. On the same row, in the **Comments** column, enter “Amateur photographers are welcome.”
8. To save the information and close the job record, click **Save and Close** on the toolbar.

Excluding Volunteers with Volunteer Attributes

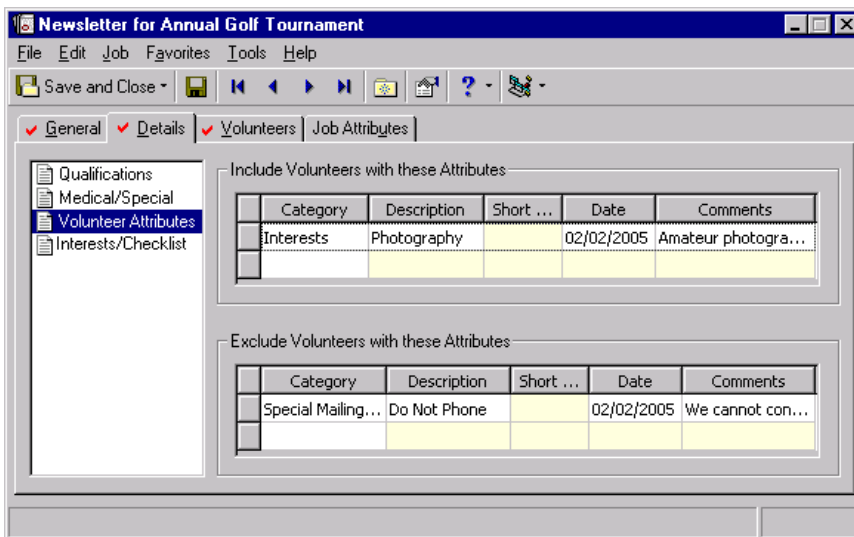
You can exclude volunteers with particular attributes by selecting **Volunteer Attributes** from the list on the left of the job record and entering information in the **Exclude Volunteers with these Attributes** grid on the right.

Exclude Volunteers with these Attributes					
	Category	Description	Short ...	Date	Comments
	Special Mailing Types	Do Not Phone		03/13/2005	Notify through...

▶ Excluding volunteers with volunteer attributes

Scenario: Your organization provides meals to the elderly people of the community. You are hosting a golf tournament to raise money for this important community service. You suddenly remember you have not found volunteers to assist the newsletter staff in taking photographs at the tournament. Before you start phoning volunteers, you remember that several volunteers do not like to be contacted by phone. This information is listed on the Attributes tab of their constituent records. When you find volunteers to assign to the Newsletter job, you want to exclude those who expressed they do not want to be phoned. From the Newsletter job record, enter an attribute with the **Category** of Special Mailing Types and a **Description** of Do Not Phone on the Details tab. If a Newsletter job record is not in your database, see “Adding general information on the General tab of the job record” on page 83.

1. From the Newsletter job, select the Details tab. For information about opening a job record, see “Opening a job record from the Jobs page of Records” on page 12.
2. Select **Volunteer Attributes** from the list on the left. The **Include Volunteers with these Attributes** and **Exclude Volunteers with these Attributes** grids appear on the right.

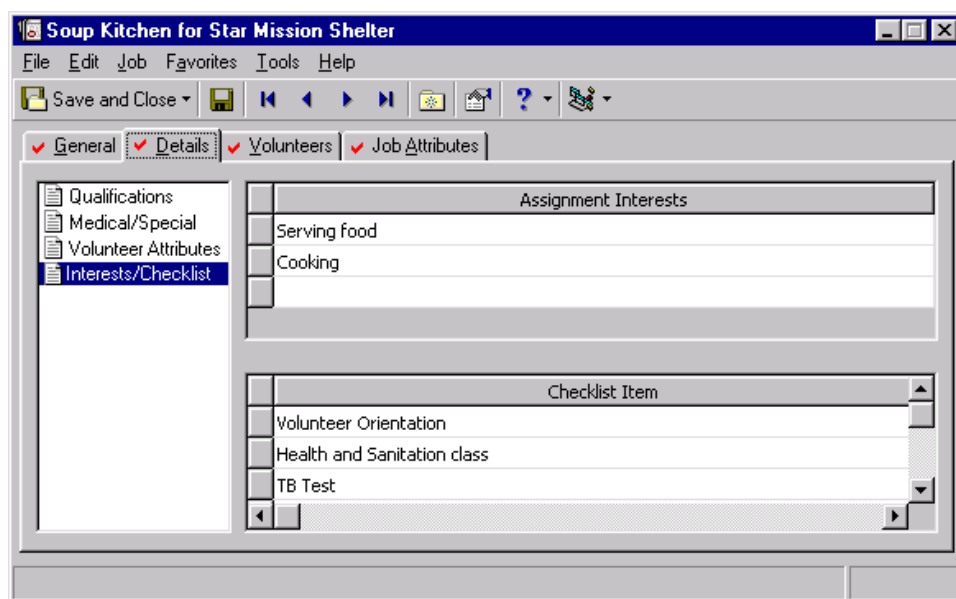


3. In the **Exclude Volunteers with these Attributes** grid, select “Special Mailing Types” in the **Category** column.
4. On the same row, in the **Description** column, select “Do Not Phone”.
5. On the same row, leave the **Short Desc** column blank because a short description was not used with this attribute.

6. On the same row, in the **Date** column, enter today's date.
7. On the same row, in the **Comments** column, enter "We cannot use these volunteers for this job."
8. To save the information and close the job record, click **Save and Close** on the toolbar.

Assignment Interests and Checklists on the Job Record

You can track assignment interests on the Details tab of your job records. Assignment interests help you assign volunteers to the jobs they enjoy most. For example, you have volunteers who come in regularly to assist your office staff with computer data entry. You set up a Computer job record. On the Details tab of the Computer job record, in the **Assignment Interests** grid, you enter "Office Staff" because you only want to assign volunteers to the job if they have an interest in working with your office staff. If you later use **Tools, Find Volunteers** on the job record to automatically find volunteers and assign them to the Computer job, the volunteers who have the same interest of Office Staff entered on the Volunteer tab of their constituent record will potentially be available for the job.



Checklists are the "to do" lists your volunteers must complete before they can start a job. For example, your organization owns and runs many historical properties. All your tour guides are volunteers. Before volunteers can be assigned to the Tour Guide job, they must complete an application, attend orientation, and attend a class on local history. On the Details tab of the Tour Guide job record, in the **Checklists** grid, you enter these checklist items. If you later use **Tools, Find Volunteers** on the job record to automatically find volunteers and assign them to the Tour Guide job, the volunteers who have the same checklist items entered on the Volunteer tab of their constituent records will be available for the job.

Assignment Interests on the Job Record

On a job record, you can track assignment interest requirements in the **Assignment Interests** grid. In this grid, on separate rows, you should enter each interest your volunteers should have before they can be assigned to the job. Perhaps your organization hosts a summer camp for children who have cancer. For the Camp Counselor job, you add assignment interests of "Children/Youth" and "Camp Counselor". This ensures you assign volunteers who are highly interested in working with children and want to be camp counselors.

Assignment Interests	
	Children/Youth
	Camp Counselor

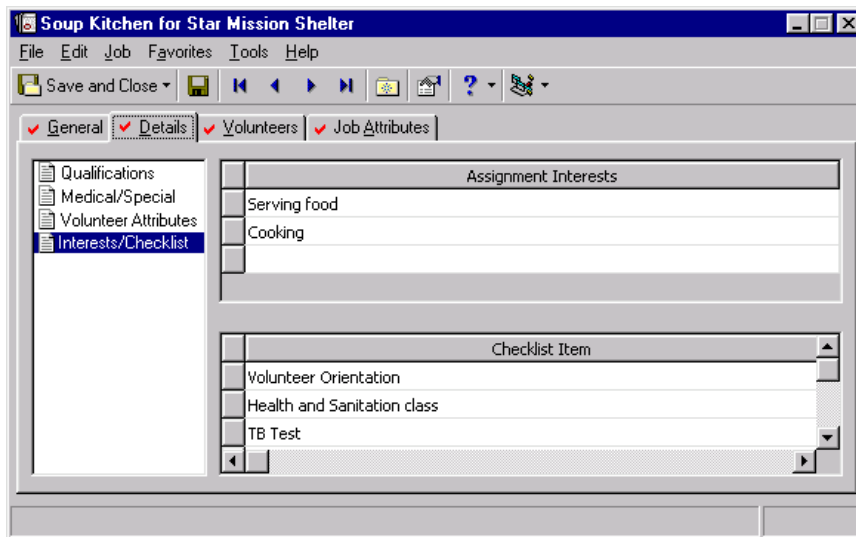
► **Adding assignment interests on the job record**

You can add assignment interests on the job record by selecting **Interests/Checklist** from the list on the left and entering information in the **Assignment Interests** grid on the right.

Scenario: Your organization runs a homeless shelter. You have many people who volunteer their time to your organization. You like to assign volunteers to jobs they are interested in. Right now, you need volunteers who are interested in cooking or serving food in your soup kitchen. From the Soup Kitchen job record, enter these two interests on the Details tab so you can find appropriate volunteers. If a Soup Kitchen job record is not in your database, see “Adding general information on the General tab of the job record” on page 83.

Note: If an entry does not exist in a drop-down list in a field where you must make a selection, you can always type your entry directly into the field if you have security rights established. A message appears, asking if you want to add the entry to that table. Select **Yes**. Even though you can add a table entry from a field with a drop-down list, for data entry consistency, we recommend you establish your table entries from the **Tables** link of *Configuration*. For information about setting up tables, see the *Configuration & Security Guide*.

1. From the Soup Kitchen job, select the Details tab. For information about opening a job record, see “Opening a job record from the Jobs page of Records” on page 12.
2. Select **Interests/Checklists** from the list on the left. The **Assignment Interests** and **Checklist Items** grids appear on the right.



3. In the **Assignment Interests** grid, on the first row, select “Serving food”.
4. In the second row, select “Cooking”.
5. To save the information and close the job record, click **Save and Close** on the toolbar.

Checklist Items on the Job Record

Checklists are the “to do” lists you assign to your volunteers. The checklist items you add on a job record indicate the items you require volunteers to complete before they can start that particular job. For example, before your volunteers can start volunteering as camp counselors, they must complete an application, attend orientation, and get a tetanus shot. Each of these items are listed on a separate row in the **Checklist Item** grid on the Camp Counselor job record. Checklists are important when determining the jobs to which volunteers can actually be assigned. If volunteers have not completed the checklist items, they should not be assigned to a job having these same checklist requirements.

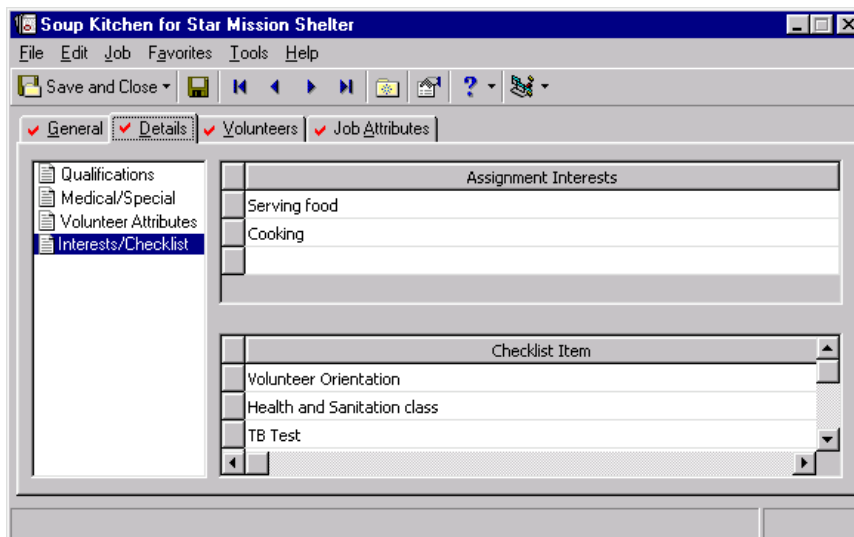
Checklist Item
Complete application
Attend orientation
Tetanus shot

▶ Adding checklist items on the job record

You can add checklist items on the job record by selecting **Interests/Checklist** from the list on the left and entering information in the **Checklist Item** grid on the right.

Scenario: Your organization runs a homeless shelter. You have many people who volunteer their time working in your soup kitchen. Before volunteers can start working in the soup kitchen, you require they attend a Volunteer Orientation session and a Health and Sanitation class. They must also get a TB test. From the Soup Kitchen job record, enter these three checklist items on the Details tab. If a Soup Kitchen job record is not in your database, see “Adding general information on the General tab of the job record” on page 83.

1. From the Soup Kitchen job, select the Details tab. For information about opening a job record, see “Opening a job record from the Jobs page of Records” on page 12.
2. Select **Interests/Checklist** from the list on the left. The **Assignment Interests** and **Checklist Item** grids appear on the right.

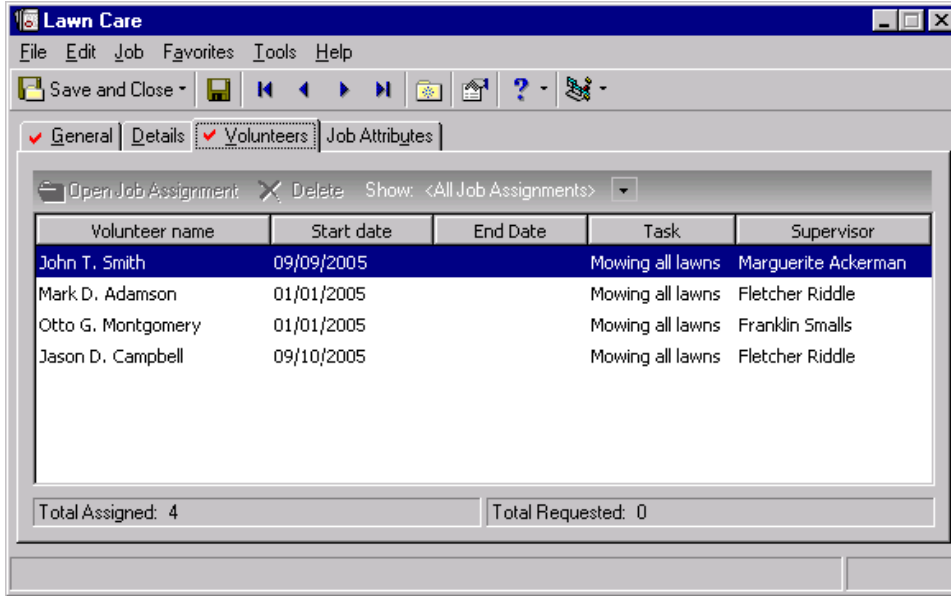


3. In the **Checklist Item** grid, on the first row, select “Volunteer Orientation”.
4. On the second row, select “Health and Sanitation class”.
5. On the third row, select “TB test”.

6. To save the information and close the job record, click **Save and Close** on the toolbar.

Job Assignments on the Job Record

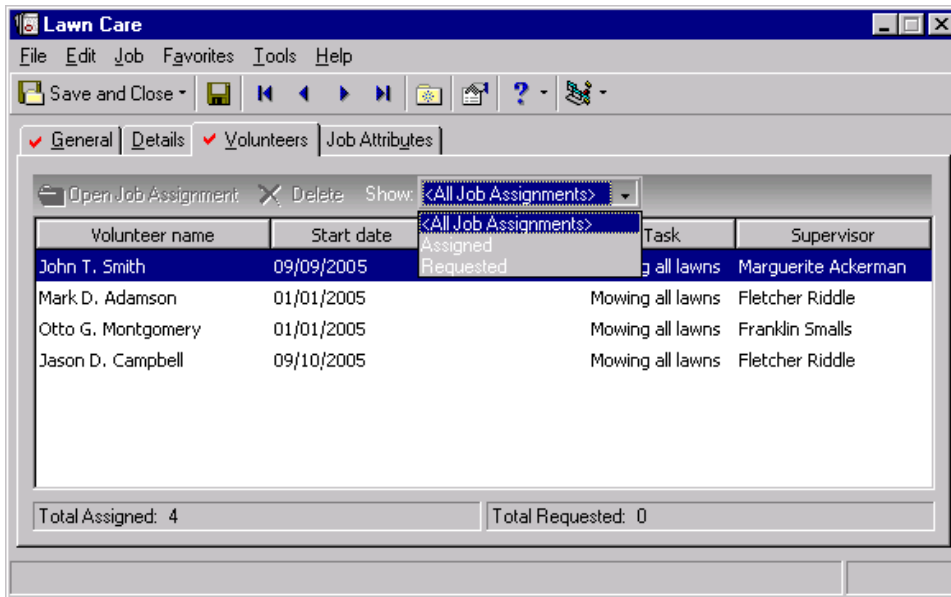
You can automatically find multiple volunteers in your database and assign them to a job by using **Tools, Find Volunteers** from the menu bar of a job record. As you assign volunteers to a job, each job assignment lists in the Job Assignments grid on the Volunteers tab of the job record and in the Job Assignments grid on the Volunteer tab of each volunteer's constituent record. This allows you to track present or past job assignments in both places.



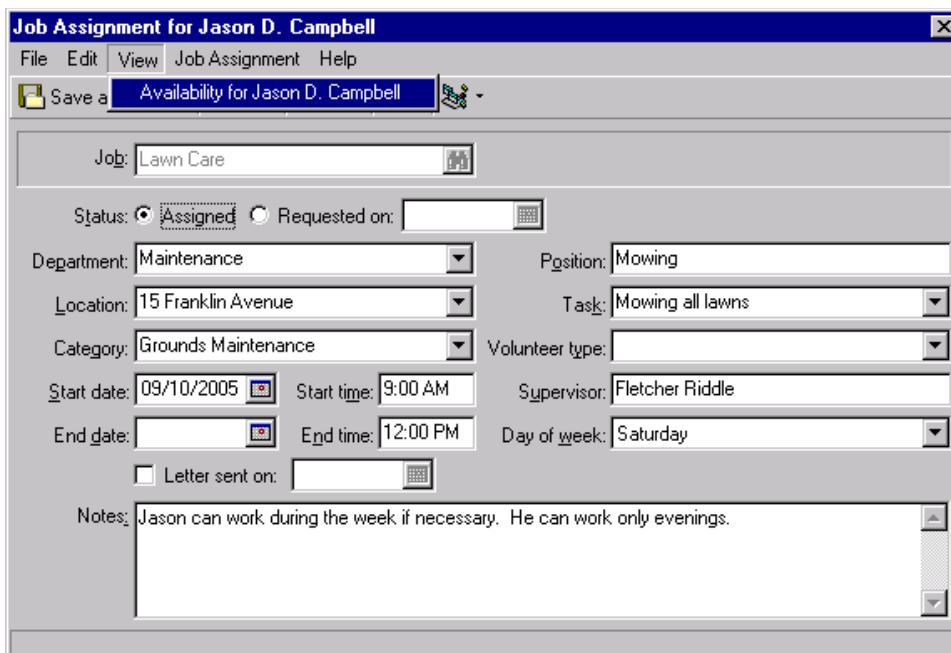
Warning: Remember that the Volunteers tab is on a job record and the Volunteer tab is on a constituent record.

After you assign volunteers to a job, you can open a job assignment on the Volunteers tab of the job record for viewing, editing, or deleting, if you have security rights.

On the Volunteers tab, you can click **Show** on the action bar above the grid to determine what you want to view in the grid. You can select to view All Job Assignments, or you can select to view Assigned or Requested job assignments.



Once a volunteer is assigned to a job, another helpful thing you can do from the Volunteers tab of the job record is to view the availability of the volunteer. Select the volunteer assignment for whom you want to view and click **Open Job Assignment** on the action bar. The Job Assignment screen appears. From the menu bar of the Job Assignment screen, select **View, Availability for**.



The volunteer availability for that particular volunteer appears. You can readily see the times, dates, and days the volunteer can work. The information that appears comes directly from the **Volunteer Availability** grid on the Volunteer tab of the volunteer's constituent record.

Volunteer Availability				
From Date	To Date	Day	Start Time	End Time
01/01	12/31	Weekends	8:00 AM	5:00 PM
01/01	12/31	Weekdays	5:00 PM	7:00 PM

Automatically Assigning Volunteers to a Job

When you use **Tools, Find Volunteers** from the menu bar of a job record, you can assign only those volunteers having criteria on the Volunteer tab of their constituent records that matches criteria listed on the job record. Remember, too much criteria on your job records and the Volunteer tab of your volunteers' constituent records can limit your ability to find jobs.

Volunteer name	Start date	End Date	Task	Supervisor
John T. Smith	09/09/2005		Mowing all lawns	Marguerite Ackerman
Mark D. Adamson	01/01/2005		Mowing all lawns	Fletcher Riddle
Otto G. Montgomery	01/01/2005		Mowing all lawns	Franklin Smalls
Jason D. Campbell	09/10/2005		Mowing all lawns	Fletcher Riddle

Total Assigned: 4 Total Requested: 0

To use **Tools, Find Volunteers** effectively, the following criteria should be true on the job record and the Volunteer tab of your volunteers' constituent records.

- A volunteer **Type** in the **Volunteer Types** grid on the Volunteer tab of the constituent record must match the **Volunteer type** on the General tab of the job record. If a volunteer type does not exist on both the constituent record and the job record, there is a potential match. If a volunteer type exists on the constituent record, but not the job record, there is no match.
- Start Date** and **End Date** in the **Volunteer Types** grid on the Volunteer tab of the constituent record must have a range wide enough to accommodate the **Start date** and **End date** on the General tab of the job record. If these dates do not exist on the constituent record or the job record, there is a potential match. The program also considers the **From Date** and **To Date** in the **Volunteer Availability** grid on the constituent record when checking for valid dates.
- All entries in the **Description**, **Skill Level**, and **License Type** columns of the **Skills and Experience Required** grid on the Details tab of the job record must exist in the **Description**, **Skill Level**, and **License Type** columns of the **Skills and Experience** grid on the Volunteer tab of the constituent record. If an **Expires** date is present in the **Skills and Experience** grid on the constituent record, it must be later than the **Start date** on the General tab of the job record. If you do not want to consider the **Expires** date, leave that column blank in the **Skills and Experience** grid.
- All entries in the **Course Name** and/or **Certification** columns of the **Courses and Training Required** grid on the Details tab of the job record must exist in the **Course Name** and/or **Certification** columns of the **Courses and Training** grid on the Volunteer tab of the constituent record. (A course may exist without a certification and vice versa. If a course and certification exist on the same row on the job record, the program considers them related, and they must exist on the same row on the constituent record.) The **Start Date** in the **Courses and Training** grid on the constituent record for each course/certification must be before the **End date** on the General tab of the job record. The **Expires** date in the **Courses and Training** grid on the Volunteer tab of the constituent record for each course/certification must be later than the **Start date** on the General tab of the job record. If you do not want to consider the **Expires** date, leave that column blank in the **Courses and Training** grid.
- All entries in the **Description** column of the **Medical Information Required** grid on the Details tab of the job record must exist in the **Description** column of the **Medical Information** grid on the Volunteer tab of the constituent record. The **Date** in the **Medical Information** grid on the constituent record must be before the **End date** on the General tab of the job record.
- To exclude volunteers, all entries in the **Special Need** column of the **Do Not Assign Volunteers Needing** grid on the Details tab of the job record must exist in the **Description** column of the **Special Needs** grid on the Volunteer tab of the constituent record. If you leave information in the **Special Needs** grid on the constituent record or information in the **Do Not Assign Volunteers Needing** grid on the job record blank, or if the information in these two grids do not match, the volunteer can be assigned to the job.
- All attribute entries in the **Category** and **Description** columns of the **Include Volunteers with these Attributes** grid on the Details tab of the job record must match attribute entries in the **Category** and **Description** columns on the Attributes tab of the volunteer's constituent record. If the attributes listed in the **Include Volunteers with these Attributes** grid on the Details tab of the job record exist on the Attributes tab of the constituent record, there is a potential match.
- To exclude particular volunteers, if the attributes listed the **Category** and **Description** columns of the **Include Volunteers with these Attributes** grid on the Details tab of the job record exist in the **Category** and **Description** columns on the Attributes tab of the volunteer's constituent record, there is no match.
- All entries in the **Assignment Interests** grid on the Details tab of the job record must exist in the **Assignment Interests** grid on the Volunteer tab of the constituent record. (You can have more assignment interests listed on the Volunteer tab of the constituent record than on the Details tab of the job record, and still have a match.) If assignment interests do not exist on the Details tab of the job record and Volunteer tab of the constituent, there is a potential match.
- All entries in the **Checklist Item** grid on the Details tab of the job record must exist in the **Volunteer Checklist** grid on the Volunteer tab of the constituent record. (You can have more checklist items listed on the Volunteer tab of the constituent record than on the Details tab of the job record, and still have a match.) **Date Completed** in the **Volunteer Checklist** grid on the Volunteer tab of the constituent record must be before the **End date** on the General tab of the job record. If you leave **Date Completed** in the **Volunteer Checklist** grid on the constituent record blank, the volunteer does not match because the program assumes the volunteer did not complete the checklist.

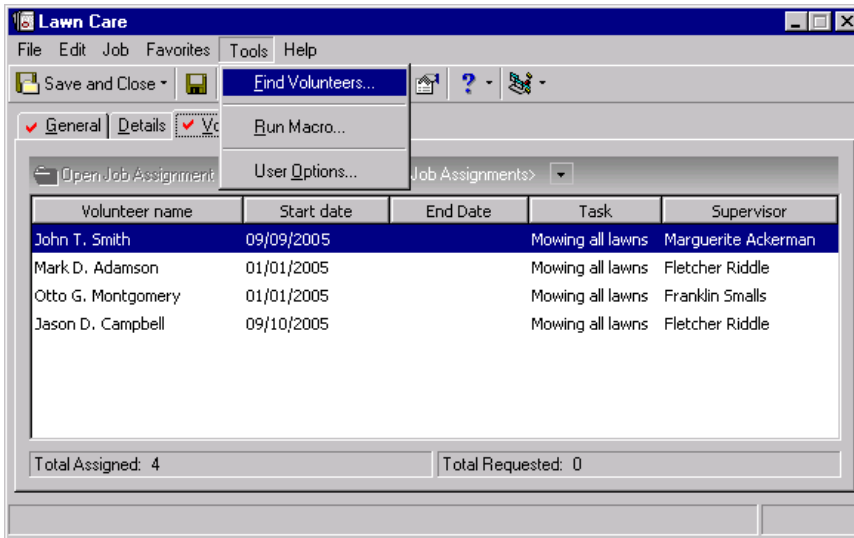
To include mandated volunteers, you must mark the **Allow mandated volunteers** checkbox on the General tab of the job record. A mandated volunteer is indicated by the **Start date** and **Date completed** fields under the **Mandate Info** section on the Volunteer tab of a constituent record. If a volunteer is a mandate during any part of the date range on the General tab of the job record (**Start date** and **End date**), there is a potential match.

▶ **Automatically finding volunteers and assigning them to a job from the job record**

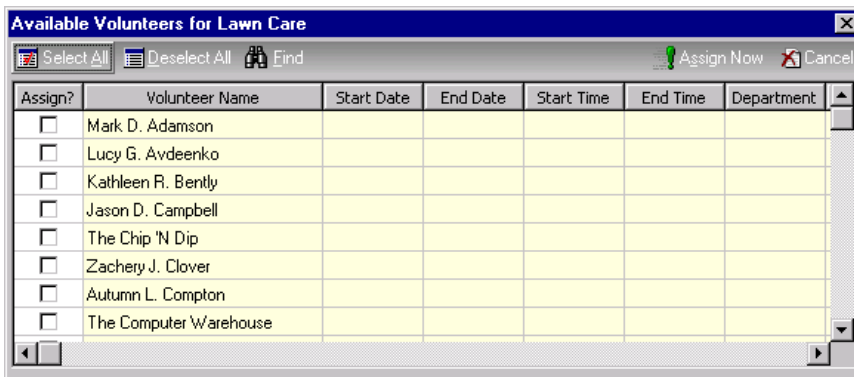
You can automatically find volunteers and assign them to a job by selecting **Tools, Find Volunteers** from the menu bar of the job record.

Scenario: Your organization is a church. Volunteers perform many jobs for the church. One job performed regularly is lawn care. You added a Lawn Care job to your database. Now, you need to assign volunteers to the job. From the Lawn Care job record, select **Tools, Find Volunteers** from the menu bar to automatically find volunteers and assign them to the job.

1. From the Lawn Care job record, select the Volunteers tab.
2. From the menu bar, select **Tools, Find Volunteers**. You do not have to be on the Volunteers tab to use the **Tools, Find Volunteers** functionality, but it helps to view all the created job assignments in one place. For information about opening a job record, see “Opening a job record from the Jobs page of Records” on page 12.



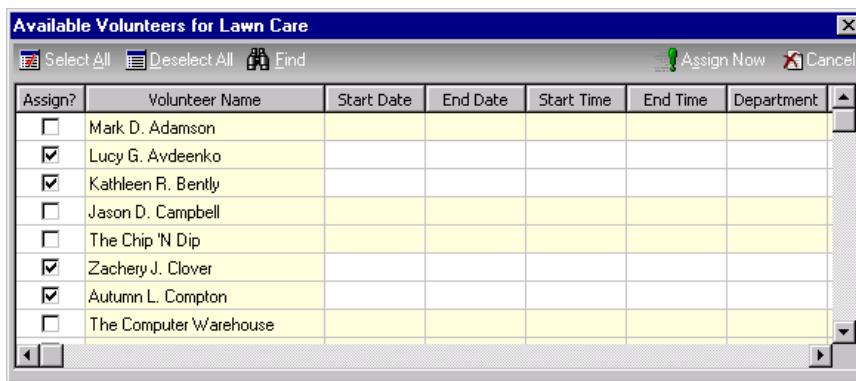
The Available Volunteers screen appears.



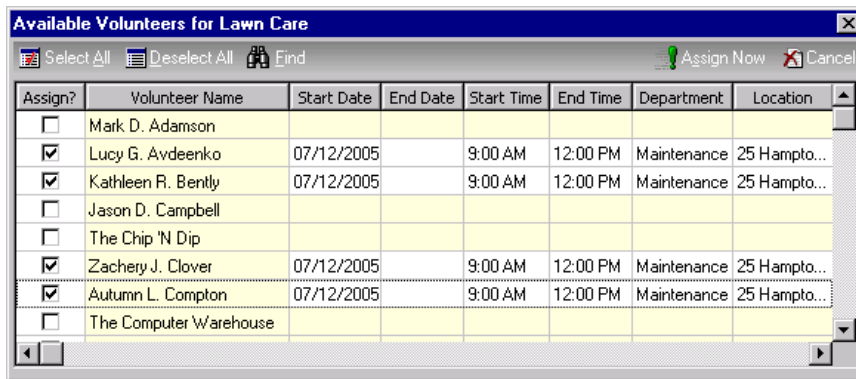
The **Volunteer Name** appears on the Available Volunteers screen and is locked. It defaults from the Volunteer tab of the volunteer’s constituent record. You cannot change the volunteer name. **Category** and **Position** default on the Available Jobs screen from the job record. You can edit the information that defaults into these two columns. You can add information in any of the other columns. The columns on the Available Jobs screen are: **Volunteer Name, Start Date, End Date, Start Time, End Time, Department, Location, Category, Position, Task, Supervisor, Day of Week, and Notes.**You must scroll to see the other columns.

Tip: If you want to select all volunteers in the grid on the Available Volunteers screen, click **Select All** on the action bar above the grid. If you want to unmark all check marks in the **Assign?** columns, click **Deselect All**.

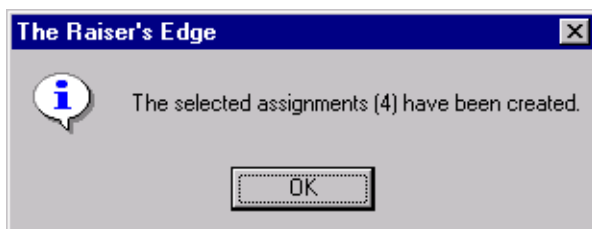
3. Mark the checkbox in the **Assign?** column by the volunteer(s) you want to assign to the Lawn Care job. Once you mark a checkbox in the **Assign?** column by a volunteer, all columns in that row are unlocked so you can enter information.



4. Enter a **Start Date, End Date, Start Time, End Time, Department, Location, Task, Supervisor, Day of Week, and Notes,** depending on the information you use at your organization. You can accept the default **Category** and **Position** or you can edit the information that appears.



5. To assign the selected volunteers to the Lawn Care job, click **Assign Now** on the action bar. If the selected volunteers match the criteria on the job record, you receive a confirmation message.



- Click **OK**. A job assignment is created for each volunteer and the assigned volunteers appear in the Job Assignments grid on the Volunteers tab of the Lawn Care job record.

Remember, the created job assignments appearing in the Job Assignments grid on the Volunteers tab of the job record also appear in the Job Assignments grid on the Volunteer tab of each volunteer's constituent record.

Note: A status bar appears on the bottom of the Volunteers tab, letting you know how many volunteers were assigned or requested.

- To save the job assignments and close the Lawn Care job record, click **Save and Close** on the toolbar.

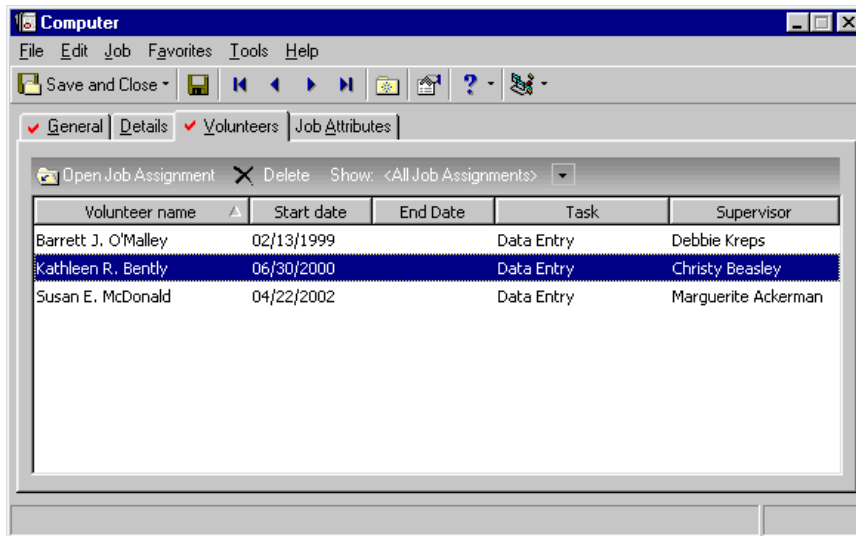
Viewing Volunteer Availability from Job Assignments on the Job Record

Once a volunteer is assigned to a job, a helpful thing you can do from the Volunteers tab of the job record is to view the availability of a volunteer. From the menu bar of an opened Job Assignment screen, select **View, Availability for**. The volunteer availability for a particular volunteer appears. You can readily see the times, dates, and days the volunteer can work. The information that appears comes directly from the **Volunteer Availability** grid on the Volunteer tab of the volunteer's constituent record.

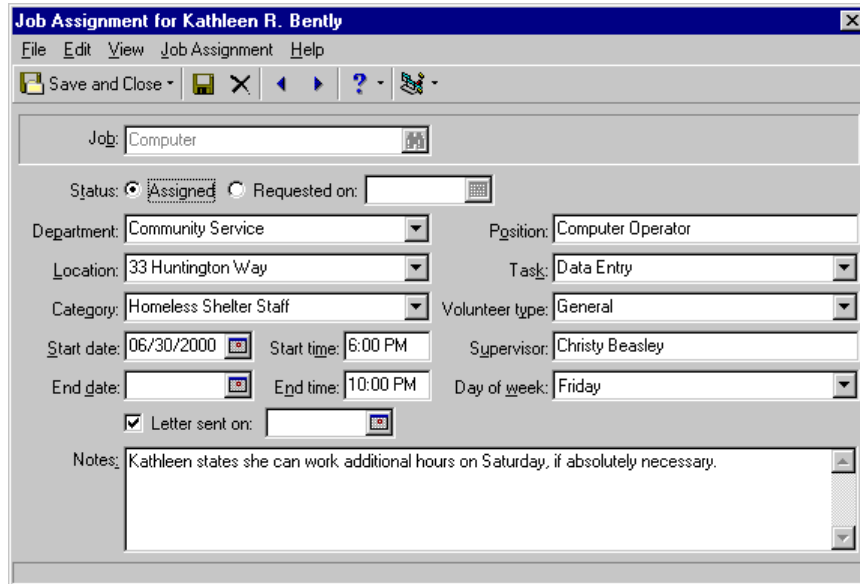
▶ Viewing volunteer availability from a job assignment on a job record

Volunteer availability helps you readily determine the dates, days, and times a volunteer can work for your organization.

- From a job record, select the Volunteers tab.
- Select the volunteer assignment for whom you want to view availability.



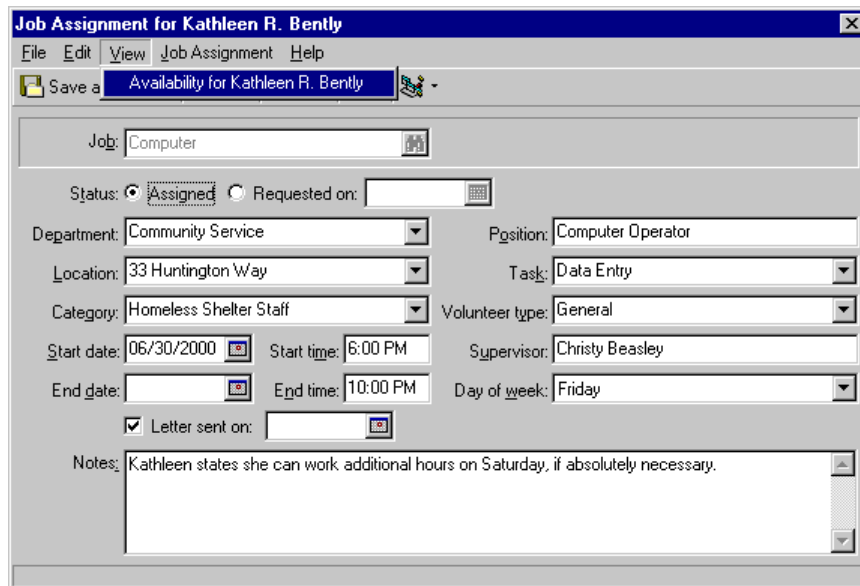
3. On the action bar, click **Open Job Assignment**. The Job Assignment screen appears.



The screenshot shows a window titled "Job Assignment for Kathleen R. Bently". The menu bar includes "File", "Edit", "View", "Job Assignment", and "Help". The action bar contains "Save and Close", a save icon, a close icon, and navigation arrows. The form fields are as follows:

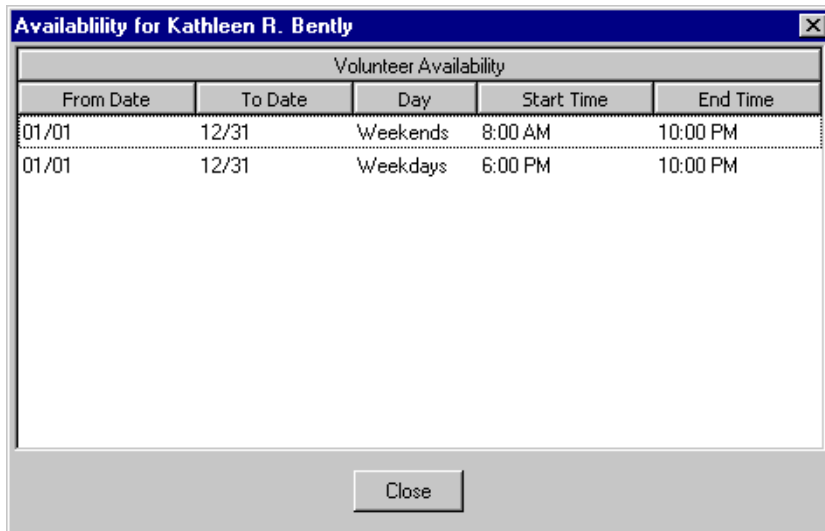
Job:	Computer				
Status:	<input checked="" type="radio"/> Assigned <input type="radio"/> Requested on: <input type="text"/>				
Department:	Community Service	Position:	Computer Operator		
Location:	33 Huntington Way	Task:	Data Entry		
Category:	Homeless Shelter Staff	Volunteer type:	General		
Start date:	06/30/2000	Start time:	6:00 PM	Supervisor:	Christy Beasley
End date:		End time:	10:00 PM	Day of week:	Friday
<input checked="" type="checkbox"/> Letter sent on: <input type="text"/>					
Notes: Kathleen states she can work additional hours on Saturday, if absolutely necessary.					

4. From the menu bar of the Job Assignment screen, select **View, Availability for [Volunteer Name]**.



The screenshot shows the same window as above, but the "View" menu is open, and the option "Availability for Kathleen R. Bently" is highlighted. The rest of the form fields remain the same as in the previous screenshot.

The Availability for screen appears, displaying the dates and times the volunteer is available to work for your organization.



The screenshot shows a window titled "Availability for Kathleen R. Bently" with a close button in the top right corner. The window contains a table with the following data:

Volunteer Availability				
From Date	To Date	Day	Start Time	End Time
01/01	12/31	Weekends	8:00 AM	10:00 PM
01/01	12/31	Weekdays	6:00 PM	10:00 PM

At the bottom of the window is a "Close" button.

5. Click **Close**. You return to the Job Assignment screen.
6. On the toolbar, click **Save and Close**. You return to the job record.
7. On the toolbar, click **Save and Close**.

Editing Job Assignments on the Job Record

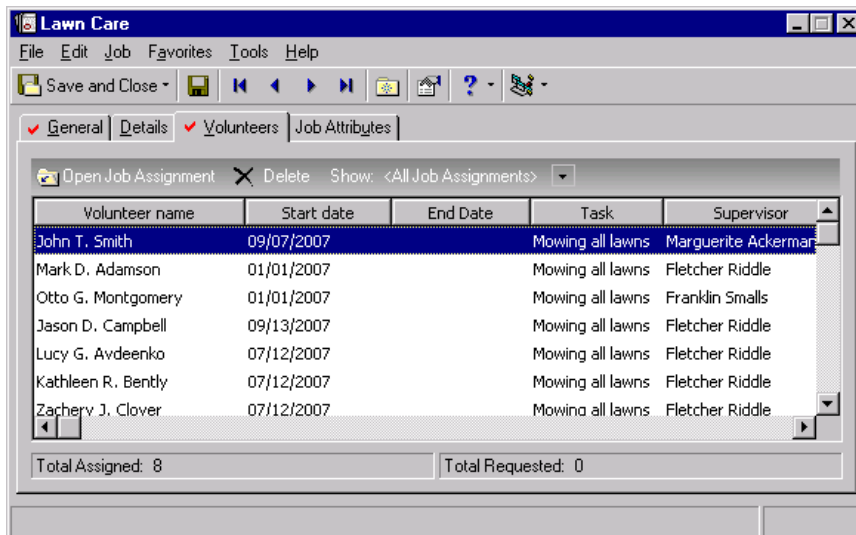
After you assign volunteers to a job, you can open a job assignment on the Volunteers tab of the job record for viewing or editing, if you have security rights. For information about establishing security rights, see the *Configuration & Security Guide*.

► **Editing a job assignment on the Volunteers tab of a job record**

On the Volunteers tab of a job record, you can open a job assignment for viewing or editing, if you have security rights.

Scenario: Your organization is a church. Volunteers perform many jobs for the church. One job performed regularly is lawn care. You added a Lawn Care job to your database and you assigned John Smith to the job. John originally told you he could work from 8:00 a.m. to 12:00 p.m. on Saturdays. He just informed you he has to change his volunteer hours. He can now work from 12:00 p.m. to 5:00 p.m. on Saturdays. Open his job assignment and change the **Start time** and **End time**. If you have not assigned John to the Lawn Care job, see “Automatically finding volunteers and assigning them to a job from the job record” on page 108.

1. From the Lawn Care job record, select the Volunteers tab. For information about opening a job record, see “Opening a job record from the Jobs page of Records” on page 12.



2. Select John Smith’s job assignment and click **Open Job Assignment** on the action bar above the grid. The Job Assignment screen appears.

Job Assignment for John T. Smith

File Edit View Job Assignment Help

Save and Close

Job: Lawn Care

Status: Assigned Requested on: [Calendar]

Department: Maintenance Position: Mowing

Location: 25 Hampton Street Task: Mowing all lawns

Category: Church Maintenance Staff Volunteer type: [Dropdown]

Start date: 09/07/2007 Start time: 8:00 AM Supervisor: Marguerite Ackerman

End date: [Calendar] End time: 12:00 PM Day of week: Saturday

Letter sent on: [Calendar]

Notes: John stated he can work additional hours, if necessary.

3. In the **Start time** field, delete 8:00 AM and enter “12:00 PM”; in the **End time** field, delete 12:00 PM and enter “5:00 PM”.

Job Assignment for John T. Smith

File Edit View Job Assignment Help

Save and Close

Job: Lawn Care

Status: Assigned Requested on: [Calendar]

Department: Maintenance Position: Mowing

Location: 25 Hampton Street Task: Mowing all lawns

Category: Church Maintenance Staff Volunteer type: [Dropdown]

Start date: 09/07/2007 Start time: 12:00 PM Supervisor: Marguerite Ackerman

End date: [Calendar] End time: 05:00 PM Day of week: Saturday

Letter sent on: 09/10/2007

Notes: John stated he can work additional hours, if necessary.

4. To save the changes and close the job assignment, click **Save and Close** on the toolbar. You return to the Volunteers tab of the Lawn Care job record.

Remember, the created job assignments appearing in the Job Assignments grid on the Volunteers tab of a job record also appear in the Job Assignments grid on the Volunteer tab of each volunteer’s constituent record. Any changes you make on John’s job assignment on the Lawn Care job record reflect on the job assignment that lists in the Job Assignments grid on the Volunteer tab of his constituent record.

Deleting Job Assignments on the Job Record

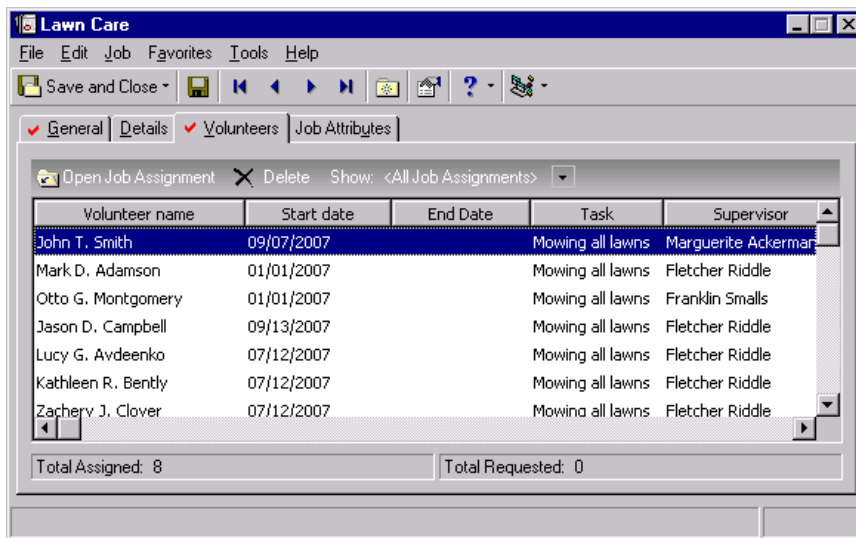
If you have the appropriate security rights, you can delete a job assignment from the Volunteers tab of a job record. The job assignment will be removed permanently from the Job Assignments tab on the job record and also from the Job Assignments grid on the Volunteer tab of the volunteer's constituent record.

▶ Deleting a job assignment on the Volunteers tab of a job record

Deleting a job assignment is permanent. Make sure you do not need the record in the future. You may need it later for historic purposes.

Scenario: Your organization is a church. John Smith volunteers for your lawn care job. You added a Lawn Care job to your database and you assigned John to the job. Now, John calls to inform you that he cannot volunteer for this job. Delete John's job assignment from the Volunteers tab of the Lawn Care job record. If you have not assigned John to the Lawn Care job, see "Automatically finding volunteers and assigning them to a job from the job record" on page 108.

1. From the Lawn Care job record, select the Volunteers tab. For information about opening a job record, see "Opening a job record from the Jobs page of Records" on page 12.



2. Select John's job assignment and click **Delete** on the action bar above the grid. The record opens and a message appears.

The screenshot shows a software window titled "Job Assignment for John T. Smith". The window has a menu bar with "File", "Edit", "View", "Job Assignment", and "Help". Below the menu bar is a toolbar with icons for "Save and Close", "Close", "Previous", "Next", "Help", and "Print". The main area contains a form with the following fields:

- Job: Lawn Care
- Status: Assigned Requested on: [calendar icon]
- Department: Maintenance
- Position: Mowing
- Location: 25 Ha
- Category: Church
- Start date: 09/07
- End date: [empty]
- Letter sent on: [checkbox] [calendar icon]
- Notes: John stated he can work additional hours, if necessary.

A modal dialog box titled "The Raiser's Edge" is overlaid on the form. It contains a question mark icon and the text "Are you sure you want to delete this Job Assignment record?". There are "Yes" and "No" buttons at the bottom of the dialog.

3. Click **Yes**. You return to the Volunteers tab. The job assignment is removed permanently from your database.
4. Click **Save and Close** on the toolbar.

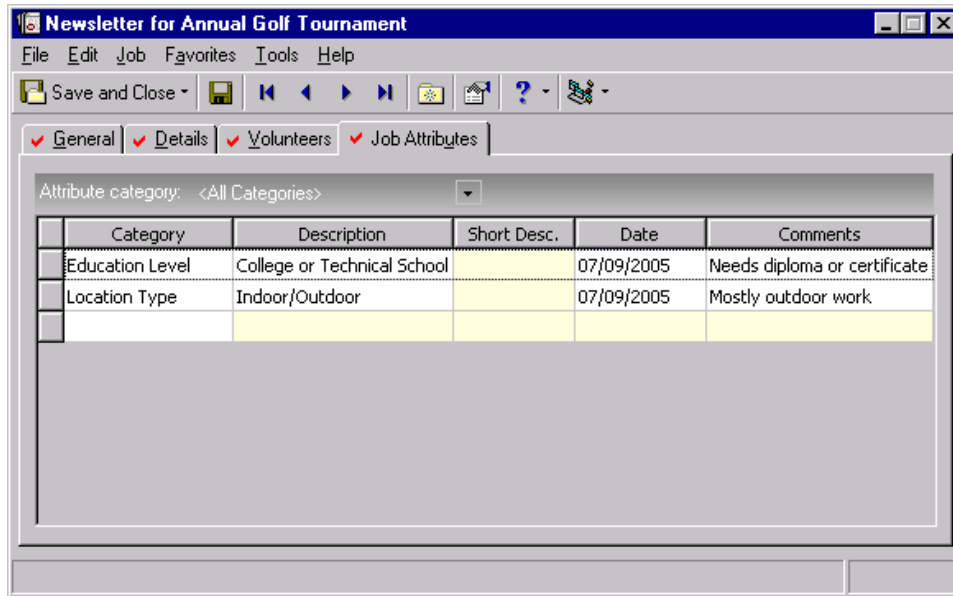
If you delete a job assignment in the Job Assignments grid on the job record, the same job assignment will disappear from the Job Assignments grid on the Volunteer tab of the constituent record.

For information about deleting a job assignment from the Volunteer tab, see "Deleting a job assignment on the Volunteer tab" on page 53.

Job Attributes

Job Attributes are useful bits of information you can attach to a job record. The Job Attributes tab helps you identify the qualities, characteristics, and concerns associated with a job record.

Although you set up attributes from the **Attributes** link of *Configuration*, you can add attributes to a job record from this tab. Select your attributes from the **Category** column in the Attributes grid and enter information in the **Description**, **Short Desc.**, **Date**, and **Comments** columns. You can choose which attributes list on this tab by filtering (sorting by type) the attributes. You can display all attributes or one specific attribute category.



An example of an attribute you may want to track for a job record is an education level — whether the job requires a college or technical school education, a high school education, or no specific education level at all. Another example is whether the job is an indoor job, an outdoor job, or takes place in both locations. The use of attributes on the job record is unlimited and can be customized for the jobs of your organization.

For information about adding attributes from the **Attributes** link of *Configuration*, see the Attributes section in the *Configuration & Security Guide*.

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