

Volunteer Tracking Software



VOLTRAK@WEB MANUAL

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Introduction

Overview of VoltrakWeb

VoltrakWeb has been designed to be a menu driven database manager specifically for volunteer organizations. Except for several setup procedures, users do not have to design informational needs or format reports. The data being tracked, and the lists and reports that are available, are a result of 25+ years of experience providing software for volunteer groups, and conscientiously listening to users and incorporating their suggestions. Ease of use has always been a prime concern.

In this version, even more effort has been put into developing a system that is still comprehensive, but so easy to use that on site training is not necessary. A few minutes are required to read through this manual to learn most of the routines of VoltrakWeb, and training (phone and online) is always available. **A basic knowledge of Windows fundamentals is expected** – how to use a mouse, drop down boxes, and other basic skills that appear in almost all software products for Windows.

This manual will first cover basic concepts of use that apply to all screens, and secondly concentrate on specific areas or functions of the software, such as the Scheduling System.

You do have Benan System's permission to edit the manual for your own personal use. Note that this document has an embedded index system; adding text may change the index paging system. This system should be re-built if significant text has been added or deleted. (See your Microsoft Word Help System.)

Read the *Getting Started* section of the manual carefully; **the initial setting up of VoltrakWeb properly is very important.** Also, this section explains the use of certain features such as the Add/Remove box, drop down lists and drop down calendars. Understanding how VoltrakWeb was designed, and learning basic operational features, will allow you to use any part of VoltrakWeb with little or no training.

VoltrakWeb uses a **relational database** to conserve capacity, provide interaction between tables, increase flexibility and reduce redundancy. Over 40 different tables are used to make up the VoltrakWeb database. One import aspect of this structure is for tracking certain information, like work areas, and is based on **Code Tables** having a number and a description. Work areas, for example, are used in over 8 different tables. Rather than have the name of the work area distributed over these tables, a 'code file' is used to track the work area by a unique number and description. It is the number that appears in all the related tables, not the description. Similarly, each volunteer has a unique key identification number; information related to a volunteer in support tables is identified by this unique number from the primary volunteer table.

Code Tables must be handled carefully; once an entry is made and used in the database, it should not be removed without understanding the consequences of how the other tables are affected. Descriptions, however, can be changed for spelling errors, as long as the new description still describes the original. Call Benan Systems if there is any question on changing existing code file entries. Once the information is entered (Getting Started, VoltrakWeb Setup, below) using a number and description, you will only see the description for subsequent use; VoltrakWeb, however, uses the number. Correcting a description does not affect the tracking systems, but changing or removing a number will drastically alter tracking information.

Code tables are used for:

- Work Areas
- Volunteer Types
- Volunteer Status

- Languages
- Skills
- Medical Tests
- Training Programs
- Referral Sources

Support is available (Monday through Thursday, 7 to 4 Pacific) at 800-865-8725. On-line support is also available (info@voltrak.net). VoltakWeb's support is included in the lease fee. Unlimited 800-support is available for short questions; extended training sessions can be set up by calling Benan Systems and scheduling a date, time and number for us to call. These training sessions are unlimited and at no charge. Several other email addresses will be added in the future to better direct your inquiry.

Contact Information - Check the last section of this manual for updates to our contact information.

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Getting Started

Installation of VoltrakWeb

VoltrakWeb has been installed for you on an SSL certified SQL server. All clients use the same application, so any revisions are immediately and automatically available to all users. Client databases are tracked by your account number.

Requirements to run VoltrakWeb:

1. A hi-speed internet connection must be available; speed of screen presentation will be directly related to the speed of your internet connection
2. Pop-blocker settings must include www.VoltrakWeb.com as a trusted site
3. Compatibility View Settings should have 'Display internet sites in Compatibility View' checked if calendar drop downs appear transparent

To add an icon to your Windows workplace, you may use one of these suggested methods (there are others). Change the instructions accordingly if you have installed VoltrakWeb on any other directory than C:\Program Files\VoltrakWeb. On some computers the installation program will provide a shortcut for you.

1. Right click any blank area on your desktop
2. Select New
3. Click on Shortcut
4. Enter 'www.VoltrakWeb.com/Client'
5. Click Next
6. Enter 'VoltrakWeb'
7. Click Finish
8. Drag and drop the shortcut to a new location on your desktop

VoltrakWeb Setup

There are certain setup procedures that are required to have VoltrakWeb operational; others may be completed at a later time. Most of these are also covered in detail under the Setup and Utilities section of the manual. If you are unfamiliar with any of the special features of VoltrakWeb, like Add/Remove or drop down Calendars, please read the section below, **VoltrakWeb Conventions**.

Required setup entries – Before any volunteer can be entered, these next features must be completed (Setup and Utilities):

Volunteer Types – up to 10 volunteer types may be used. These are generally groups like Adults, High School, College, and Community Service that represent the type of volunteer, not where they work. The volunteer type is automatically entered in each work hour record that is posted. In addition to being available as a filter to many lists and reports, work hours are also broken down by volunteer type in both Month and Year End reports.

Volunteer Types must be entered before entering your first volunteer record. Up to ten types may be entered; at least one is mandatory. Types are used to:

- Identify a volunteer group, such as Teens, College Students, Adults, Community Service, etc.
- Separate work hours for Monthly and Year End Reports, summary hours and work area hours

- Serves as a filter for many reports, such as volunteer lists
- Is automatically 'attached' to all work data postings

Types may be added at any time. However, once a type is entered, assigned to volunteers and work hours posted, this type should not be removed. It is not recommended to use Volunteer Types to identify work areas.

To enter Volunteer Types, select Code Files, then Volunteer Types. To add a record, press the + button on the 'Nav Bar.' Enter a number (1-10) and description of the type.

Volunteer Status – there are pre-loaded entries in this code file – Active, Inactive, OnLeave, Resigned and Pending. These may be changed EXCEPT for Active (code number 1); Active is used to limit volunteers signing in to only those on Active status.

Default Settings

Several options are available for client access and are available under Setup and Utilities:

1. Manually posting hours default can be set by time in/out or bulk hours (Main Menu, Work Data, Post Work Data)
2. Search default can be set to search by number or last name
3. Volunteer sign in can be set to allow all volunteers or only those on Active status to sign in

User Passwords

Passwords may be assigned at any time using the Master Password that was installed for you by Benan Systems. It is highly recommended that all users be given their own password (not volunteers signing in) and that the Audit Log be enabled (Setup and Utilities).

A special password should be set up for the volunteer sign in terminals that has 'Sign In' rights; use of this password will limit access to only the sign in number pad. 'Activate Sign in Screen' checkbox does not have to be checked with the use of this password.

User Email Addresses may also be entered with user passwords; currently any email functions used now default to the 'master' user address and name. We may change this to allow the user sending an email to have the default return address switch to their address entered with their password; if no email address was entered with their password, the default email return address will be used.

Volunteer Status

Volunteer Status comes with Active, Inactive, On Leave and Resigned. Active (code #1) must NOT be changed if only volunteers on Active status are to be allowed to sign in. Status entries may be changed or added to except for Active (#1). Common additions are Pending, Non-Compliant and Applicant.

To enter Volunteer Status, select Code Files under Setup and Utilities, then Volunteer Status, and proceed as in Volunteer Types.

Work Areas

Work Areas are not required to begin, but they are required to enter Assigned Work Areas in a volunteer's record, post work hours and use the Scheduling System.

Ranges are used for 'Main Facility' and 'Out of Facility' categories:

5000 - 8999 Main Facility Work Areas
9000 - 9999 Out of Facility Work Areas

To enter Work Areas, select Code Files, then Work Areas.

Languages, Skills, Medical Tests, and Training Programs

These are not required, but entry is recommended for at least languages and skills, as they are part of a volunteer's entry record. Medical Tests and Training Programs may be entered prior to using these tracking systems.

To enter, select Code Files, then the appropriate table.

Referral Sources

These establish where a volunteer came from, or learned about the volunteer program. Examples of these would be Previous Volunteer, Church, (name) High School, and Previous Patient.

To enter Referral Sources, select Code Files, then Referral Sources.

Award Levels

Levels must be entered AFTER Volunteer Types are established, and before an award calculation is performed. Two levels of awards are available, and Volunteer Types are assigned to one of the two levels. See the section on Awards for a detailed explanation.

To enter Awards, select Set Award Levels, and follow the instructions.

Set Label Sizes

Label Sizes must be set before any label requests are made. The standard label setup, offered as an example in the setup, is for 30 labels per page, the type of label recommended for laser and DeskJet type printers.

Merge Letters

These letters are used for Applicants (application return, interview, and orientation), Medical Tests, Training Programs, and Inactivity notices. VoltrakWeb supplies the date, address, 'Dear *first name*:' and the first paragraph for you. The body of the letter that is automatically attached is user created. On each appropriate screen, e.g. Medical Tests, the Edit option at the top of the screen allows you to enter the 'body' of the letter. (Note that in this version of VoltrakWeb there is no spelling checker.) The first paragraph that is entered for you usually identifies what the letter is for, and an appropriate date. For example, if a letter for T B Test was selected, VoltrakWeb's first paragraph would be 'You have been scheduled for a TB Test on *date*.'

Email

Outgoing Email is provided for you, and permits up to a 1MB attachment. VoltrakWeb provides both individual email on the Volunteer Record and group email on Volunteer Lists.

General information on sending email

VoltrakWeb has two different ways of sending emails:

1. Personal email by selecting the volunteer in Volunteer Records and clicking on 'Send Email.'
2. Group email is under Volunteer Record, Volunteer Lists. Select filters first then click on 'Send Email.' Note that there are also list prints for those with email addresses and those without. If you are not sure who is getting the email, also select the list of those with email addresses. Volunteers with no email addresses are automatically dropped from the emails sent. You may also want to select just the 'Name List' to cross reference those that were on the request that do not have an email address.

VoltrakWeb Conventions

Most of VoltrakWeb's use of screens and buttons follow Windows internet conventions as closely as possible. Use of the mouse, 'double clicking,' screen manipulation, etc, are assumed to be part of each user's basic knowledge of computer operation. However, a database management program often has screen items that are not encountered in other Windows-based software programs.

Tab key versus Enter key is a Windows convention that takes some getting used to. The Tab key will take you from one data entry box to the next, whereas the Enter key will not. Windows uses the Enter key to process a command. For example, when entering your password for VoltrakWeb, the OK button is active; pressing the Enter key is the same as clicking on the 'OK' button.

Display Grids

These are used primarily to display and select records, or to allow both search and interactive changing of some grid information.

This grid is for Search and Selection:

VOLUNTEER RECORDS					
Add	Advance Search	Search by	<input type="radio"/> Last	<input type="radio"/> First	<input checked="" type="radio"/> Number
<input type="text"/>					Search
View	VN	Title	First Name	Last Name	Nickname
View	101		Patricia	Richardson	Patty
View	76		Louise	Ritter	
View	9		Vivian	Robey	
View	43		Dale	Rosen	
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z ALL					

This grid allows both searching and direct field interaction:

Award Calculation Search by ☐ Last ☐ First ☒ Number **Search**

	Last Name	First Name	Last Award	Date Received	Award Due	Career Hours
Update Cancel	Adams	Jane	<input type="text" value="500"/>	<input type="text" value="09/30/2005"/>	<input type="text" value="750"/>	<input type="text" value="900"/>
Update Cancel	Allain	Kristy	<input type="text" value="1000"/>	<input type="text" value="08/31/2007"/>	<input type="text"/>	<input type="text" value="1290"/>
Update Cancel	Allen	Dorothy	<input type="text" value="6000"/>	<input type="text" value="09/30/2001"/>	<input type="text" value="6500"/>	<input type="text" value="6970"/>
Update Cancel	Anderson	Ruth	<input type="text" value="1500"/>	<input type="text" value="09/30/2005"/>	<input type="text"/>	<input type="text" value="1961"/>
Update Cancel	Bain	Barbara	<input type="text" value="2000"/>	<input type="text" value="09/30/2005"/>	<input type="text" value="2500"/>	<input type="text" value="2528"/>
Update Cancel	Barreto	Mary Jane	<input type="text" value="1500"/>	<input type="text" value="08/31/2007"/>	<input type="text" value="2000"/>	<input type="text" value="2303"/>
Update Cancel	Becraft	William	<input type="text" value="500"/>	<input type="text" value="09/30/2006"/>	<input type="text" value="750"/>	<input type="text" value="991"/>
Update Cancel	Bell	Mary	<input type="text" value="2000"/>	<input type="text" value="09/30/2006"/>	<input type="text"/>	<input type="text" value="2401.25"/>

The left column indicates the action that can be taken. In the second option, values within boxes can be changed in the grid, then updated from the left column.

In some cases, more columns of data may be available, and a scroll bar will appear at the bottom of the grid. The scroll bar at the right will scroll through the records available. Some grids will have an option at the bottom (right scroll bar may have to be moved down) that will present the alphabet or the number of grids available continuing data presentation.

Order of grid data, on most grids, can be changed by clicking on the column header.

Partial Entry Searches

These are used to locate information, particularly volunteers. The radio buttons at the top (see the first grid sample, above) are used to select the type of data to be searched. The data entry area is used to type in, e.g. known letters of the last name. **Note that searches are not upper/lower case dependent and only the complete Volunteer number can be entered (no partial search).** After the desired letters are typed in and the 'Search' button is clicked, the matches are presented in the **Grid**. The 'Search By' setting default may be changed under Setup and Utilities, Miscellaneous Settings.

Add/Remove Boxes

These are convenient options to select multiple items from a list, like the presentation of available work areas. In the example, two work areas and three skills have been entered on a volunteer's record for tracking.

Work Areas

Volunteer Department
Substance Abuse Center

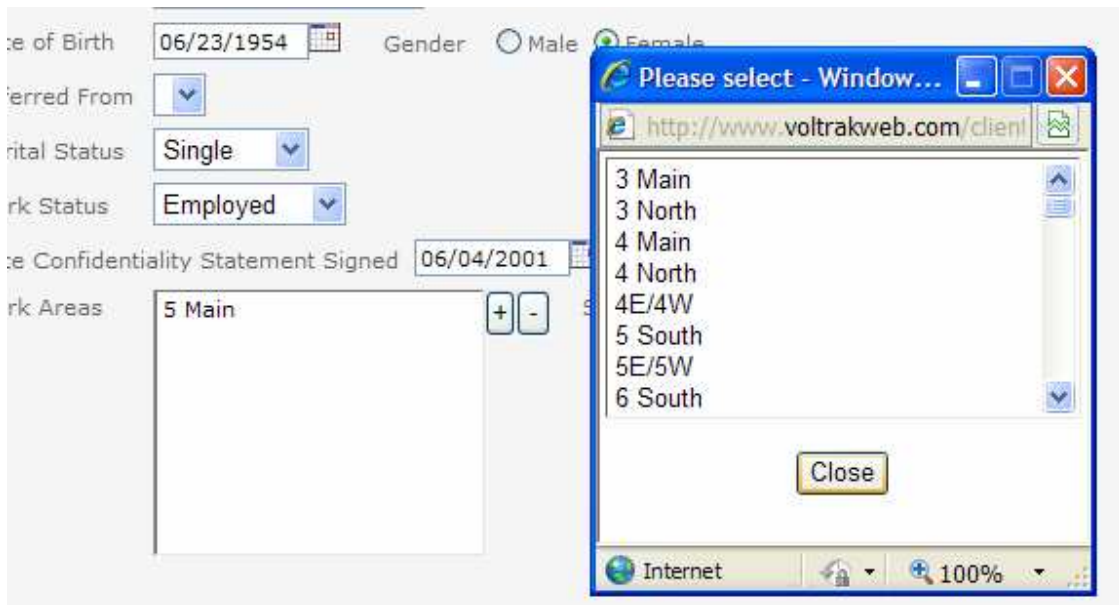
+ -

Skills

Computer Input
Word Processing
Internet User

+ -

To use the Add/Remove box to assign work areas, the '+' button is clicked, and those work areas (from the code file) that have not yet been selected are presented in a pop-up box.



The list may be moved quickly to a different alpha position by clicking in the white area of the box and entering an alpha character, like 'v' to shift the listing to areas that begin with 'v' or 'V.'

To select an item, click on the item. Multiple items may be selected by using Ctrl-Click; to select a group of items that are successive, click on the first item then Shift-Click on the last. Closing will select those items highlighted and enter the data accordingly.

To delete an item, click on the item to highlight, then click on the '-' button.

List Boxes

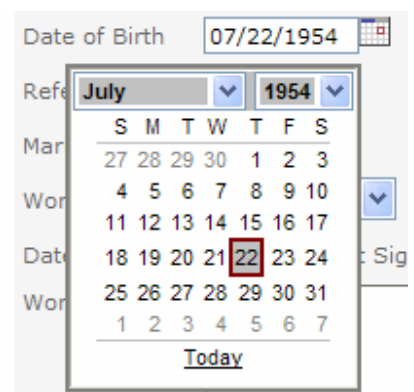
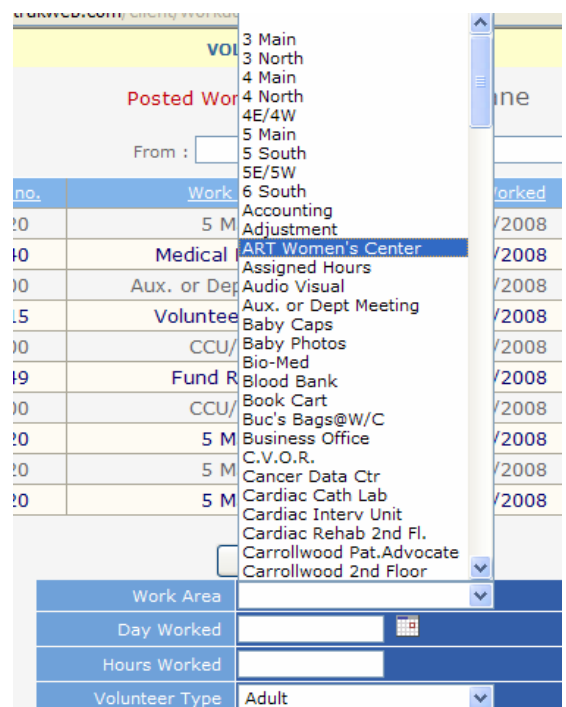
Also called 'drop down boxes,' these are generally used to select items that come from the Code tables. The description is displayed, but the corresponding number is used for tracking. In this example, clicking in the data entry field 'Work Area' will bring up the list, either above or below the field, depending on screen space. There are several options for selection:

1. Moving the list with the right scroll bar and then clicking on the desired item
2. Clicking anywhere in the list presentation and typing in an alpha character will move the list to those items beginning with that alpha character then clicking on the desired item


Date Boxes

These boxes work in several ways:

1. All dates are presented as mm/dd/yyyy



2. Any portion of the date (day, month, and year) may be edited independently clicking on and holding the mouse click then moving the mouse to highlight the portion of the date to change, including the entire date
3. Clicking the down arrow to present a calendar to select a date (month, year and day) – NOTE that the year presented in the year drop down will be either +/- two years from the current date if the box is empty, or +/- two years of the date in the year box.
4. Clicking on 'Today' to select the current date

Date of Birth	07/22/1954	
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The required date format is mm/dd/yyyy. Entry of previous dates into a bland date box, if the date is more than two past years, like birth date, it is easier to simply type in the date in the above format than use the drop down calendar. Tab or arrow keys do not work in these date boxes.

Print Request Screens

Print requests made from a print menu with other selections or a straight button to print are always presented in a PDF format preview.

If the PDF viewer on your system is set up with a browser, this preview can be emailed using you local email system.

Print Request Menus. Most print requests are presented on a screen that provides for:

- Selection of the report(s) – A list of available reports is provided on checkboxes, allowing more than one at a time to be chosen.
- Optional Limitations – These may vary between print requests, but basically allow you to limit the report(s) selected by certain criteria, such as Volunteer Type or Status. Add/Remove boxes are used for ease of selection. Depending on the criteria, if the box is not checked, the criteria are ignored and all are selected. For example, if a list of Adult only volunteers was wanted, the Volunteer Type limitation would be used; otherwise the list would contain all volunteers. More than one of each criterion available may always be selected.
- Preview Before Printing – Always presented in a PDF format. This option presents a print preview of each report selection; from the Preview Screen, the report may be printed, saved, email and/or cancelled. Printer Setup is also available from this screen allowing choice of available printers, and usually their printing preferences.

Export

There several types of data Export:

1. Print menus may have export selection which is limited to specific fields, generally name and address
2. Volunteer lists have two exports, one with label information and the other for the Volunteer Record primary data which utilizes the filters available
3. Full data export (Master Password ONLY) will export all relevant data, placing the contents of each table in a separate sheet of an excel file. Posted work hours will also be placed in an excel sheet, however if there are more than 65,000 records that export will not be complete. To resolve this, archive older work data (Setup and Utilities). Linking is not done between the code files and other table fields with these codes.

Labels

On most Print Requests, labels may be requested limited also to the volunteers on the reports requested. The label size used is in the Label Setup under Setup and Utilities and may be adjusted there.

PDF previews are not always 'exact,' and the margins of the label under VoltrakWeb's setup may have to be adjusted. Also, there are other controls in the PDF preview prior printing that will affect the duplication of the image on label paper. Page Handling, Page Scaling should generally be set to 'none.'

Partially used labels sheets can be used for the first page. On the print request, enter the number of labels that have already been used and removed ('blank' labels on VoltrakWeb's menu). Note that printing is done from top to bottom before the next column is used.

Overview - Main Menu

The Main Menu not only provides access to other areas, such as Volunteer Records, but also gives immediate access to many of VoltrakWeb's printing functions, such as the Monthly Hour Reporting System. Except for special areas that are accessed less frequently (e.g., Awards), **the majority of VoltrakWeb is run from three Menus – Volunteer Records, Volunteer Lists and General Reports.**

The Menu has primary items under which are secondary selections, and is presented as a persistent side bar menu.

»Volunteer Records	Volunteer Records
Volunteer Records	<u>Volunteer Record</u> - This is one of the more active areas, giving you the majority of all information tracked on a volunteer on one screen.
Volunteer Lists	<u>Volunteer Lists</u> – a print menu with 20+ reports and a variety of filters; also provides for group emails and volunteer sign in messages
No Work Start Date	<u>No Work Start Date</u> – a quick report for those w/o a start date.
Volunteer Dues	<u>Volunteer Dues</u> for those tracking volunteer or auxiliary dues.
»Work Data	Work Data
Post Work Data	<u>Post Work data</u> – manually posting of work data
Post Daily Sign In Sheet	<u>Post sign in sheet</u> – uses the scheduling system to print and post
Edit Work Data Records	<u>Edit Work Data Records</u> – several options to search and edit work data
Reports	<u>Reports</u> – a report menu for posted work data with several filters including data range of work data
»Medical Tests	Medical Tests
Medical Tests	<u>Medical Tests</u> - allows preview and data entry of all medical tests, similar to accessing the same information through the Volunteer Record
Standard Letter	<u>Standard letter</u> – user edit of the letter for notifying an upcoming due test
Reports	<u>Reports</u> – print menu for lists, letters and export with filters
»Training Programs	Training Programs
Training Programs	Options are the same as with Medical Test
Standard Letter	
Reports	
»Scheduling	Scheduling
View Schedules	<u>View</u> – Monthly schedules that have been built from the Master
Edit Master Schedule Plan	<u>Edit Master Schedule</u> – enter volunteer master schedule records to be used to build monthly schedules
Print Schedules	<u>Print Menu</u> allowing a large variety of different print formats
Build a Month's Schedule	<u>Build a month's schedule</u> – uses the master to build a schedule by date

»Awards
Awards
Global Update
Report/Export Selections
»General Reports
Inactivity/Activity
Longevity
Monthly Calculations
Monthly Reports
Year End Reports
Year to Year Comparisons
Volunteer Statistics
»Setup and Utilities
Code Files
Select Vol. to Archive
View/Retrieve Arc. Vol.
Arc./Ret. Daily Work
Arc./Ret. Yr. End Sum.
Purge Schedules
Set Award Levels
Set Label Sizes
User Passwords
Master Settings
Audit Log
Miscellaneous Defaults

Awards

Awards – displays an editable grid of awards due and received; automatic calculation of awards also on this screen

Global update – move received awards from due to received with date

Print Menu – several print formats including due awards separated by level

General Reports

Inactivity reports – based on last work date with mail merge letter

Longevity – print menu based on work start date provides lists, 5 year increments of work and folder labels

Monthly calculations – summarizes daily work data for both Monthly and Year end reports

Monthly reports and Year End reports – produce summaries and work hours breakdown by work areas; also has memos for work areas with volunteer names and hours

Year to year comparisons for all years by month, or work areas (10 years)
Volunteer Statistics – type counts, age grouping

Setup and Utilities

Code Files – Entry/edit for Work areas, Types, Skills, Medical, etc.

Select Vol to Archive – presents a multiple selection add/remove box for transferring volunteers to the archive system

View/Retrive Arc. Vol. – search, profiles and retrieve archived volunteers

Arc./Ret. Daily Work – provides for archive and retrieving of work hours by month range that have been calculated

Arch.Ret. Yr. End Sum. – these summaries relate to all Month and Year end reports that contain the volunteer names

Purge Schedules – purge routines for past month's built schedules

Set Award Levels – association of Volunteer type to award levels (2 options)

Set Label Sizes – adjust or change label sheets being used; important to adjust PDF to printer

User passwords* – assign individual user passwords sign in password

Master Settings – default sender email address for return emails and master password

Audit Log* – when enabled tracks user activity and if changes were made

Misc. defaults* – screen presentation for hours entry (time.bulk), search (number/name) and sets volunteer sign in to Active only

Data Export* – export of all data tables to excel, each in a separate sheet

* requires Master Password

The last four items on the Setup and Utilities are available only to the Master Password. These available items may change on subsequent software revisions.

Applicant Tracking

Applicant Tracking is a complete system for tracking potential volunteers. Special features are Reminder Letters for application return, interview, and orientation. Once an applicant has been chosen to become a volunteer, a transfer feature quickly removes them from the applicant tracking, assigns a number, and places them in the regular VoltrakWeb database.

Report Generator

For those who are familiar with relational database management, ad hoc reports may be designed with a report generator. VoltrakWeb (at this printing) is still looking for an XML compatible report generator that can be integrated with VoltrakWeb application software. For most clients, our 125+ built in reports with filter options is sufficient. However, our full Data Export to Excel is expected to be implemented by July, 2011. Excel can then be used to generate ad hoc reports. There are also a variety of other software report generator programs that can be used for generating reports locally from the exported data. If you require assistance in an explanation of how our code number system is employed throughout the database, please contact support. Please note, we are not able to assist you in the use of any report generator you may be using locally, including excel or access.

Volunteer Record

Volunteer Record

The Volunteer Record screen and the Work Data Screen, are the two most heavily used areas of VoltrakWeb, and to which we will devote an entire Chapter. However, if you look closely at the screens below (or on the computer), you will see that just about everything you need to know about your volunteers is right in front of you.

The volunteer record, as a web page, requires scrolling down for the full record. It has been designed to make most of the relevant data available without scrolling; the amount of data displayed also depends on the resolution of the monitor. Sections of this page will be used below to explain the various functions.

»Volunteer Records

Volunteer Records

Volunteer Lists

No Work Start Date

Volunteer Dues

»Work Data

»Medical Tests

»Training Programs

»Scheduling

»Awards

»General Reports

»Setup and Utilities

»Sign In Utilities

»Applicant Tracking

Logout

VOLUNTEER RECORDS

Add Advance Search Search by ☐ Last ☐ First ☒ Number Search

	VN	Title	First Name	Last Name	Nickname
View	53		Jane	Adams	
View	90		Kristy	Allain	
View	100		Dorothy	Allen	
View	42		Ruth	Anderson	

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z ALL

Work Data Medical Tests Training Program Daily Schedule Master Schedule Entry

See Office Personal Message Send Email Load Picture Delete Picture Reports

Volunteer Record Save Delete Cancel

General Work Related Emergency/Addt'l Alternate Address

Title First Name Jane MI J Last Name* Adams

Nickname

Address 1 80 Seaview Court # 503


Address 2

City Scottsdale State AZ Zip 79827

Home Phone 123-555-6783 Work Phone

Alt Phone

Email Jane.Adams@email.web



(partial screen)

However, there are a few helpful hints that we want to share.

This screen is accessed by clicking on Volunteer Records (Main Menu Group) then the subgroup Volunteer Records.

The Search By in this screen is set as a default to (volunteer) number; this default may be changed under Setup and Utilities, Miscellaneous Defaults. The search grid can display names beginning with a single alpha character from clicking on the character at the bottom of the grid, all volunteers (grid bottom), or a matching list of volunteers from entering a partial alpha entry (case insensitive) in the search field. View is then clicked for the record display. If the Search By is set to number, the entire number must be entered. If valid, that record will be displayed automatically; otherwise a message will be displayed as invalid.

WARNING! Do NOT click 'Save' on the volunteer record if the button Work Data has been used to change, delete or add work data. This database is a relational database, meaning many files are contributing to the data you see on your volunteer record screen. That visible data is not 'live' data but has been copied from different tables. When work data are changed from the Work Data button, it also affects a volunteer's accumulated and year to date hours, changing those values. The new values are NOT displayed on the current screen's display for accumulated and year to date hours. If 'Save' is clicked on the volunteer's record, the old values are saved, overwriting the new ones. This is not the case for any of the other brown access buttons since they don't directly affect the volunteer table.

Advance Search is a routine to let you search a particular field for a value; this can be partial, and can be either at the beginning of the field, or embedded within the field's value. This search can be helpful, for example, in finding to whom a phone number belongs.

New Volunteer Entry

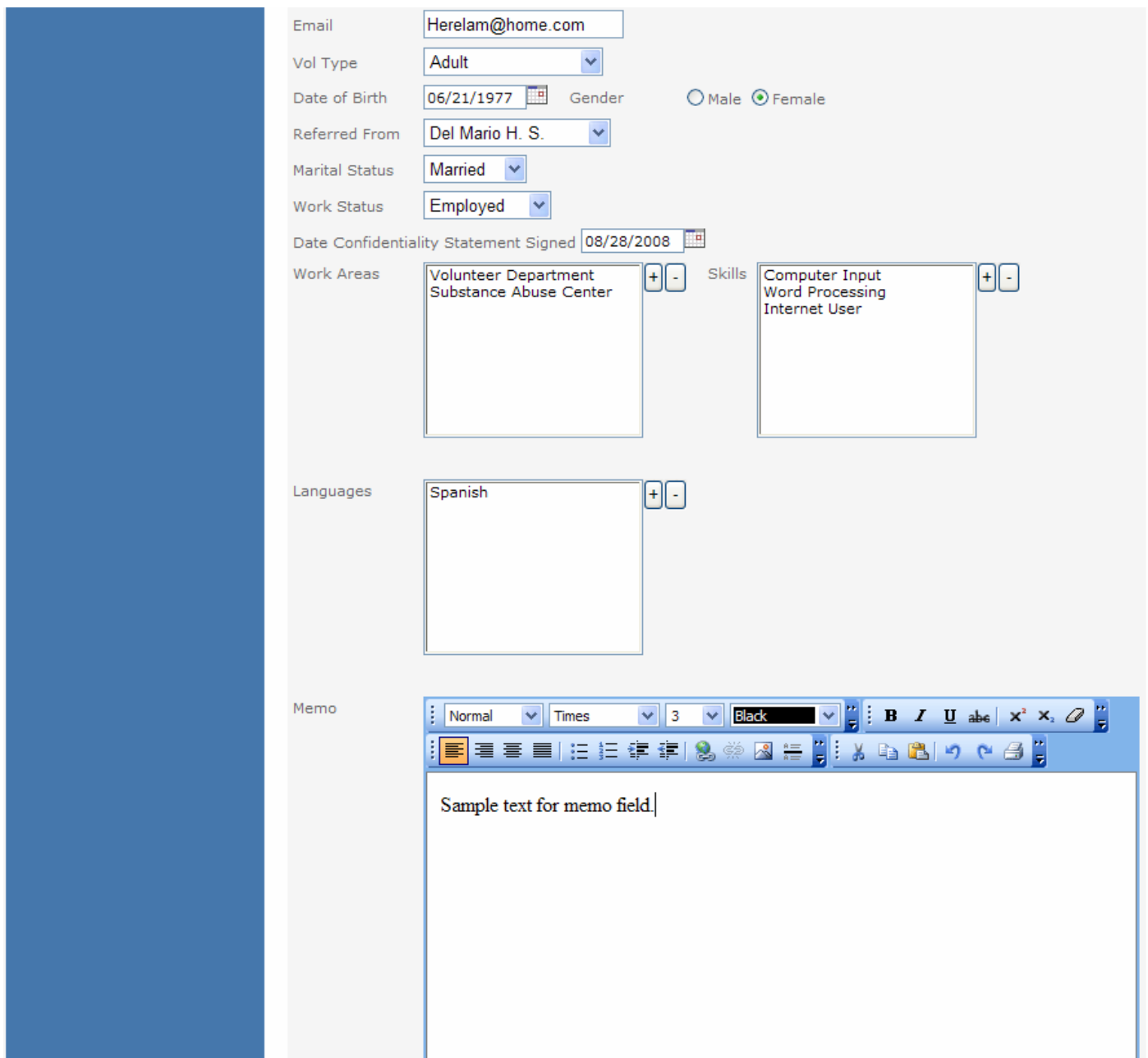
A new volunteer is entered by clicking the 'Add' button. Mandatory entries are Last Name and Volunteer Type. The tab key will move you from field to field, not the Entry key. At any time you may cancel the entry by clicking on 'Cancel.' When completed with the initial entry, or with any changes, you **must** click on the 'Save' button.

Note that the initial entry only presents the basic information on the volunteer (General Tab). This is necessary to establish the record and assign an ID number; the number is the key field for linking this record to all other related data in other tables, like medical tests. After completing the initial entry, and saving, you can then select this record from the grid above and continue entering the remainder of the support data on the General and other tabs, as well as the 'brown' buttons and (Work Areas, Skills, Languages, Medical Tests, Training Programs, etc.)

The tab **Work Related**, except for volunteer status, date and start date, is kept up to date automatically. Awards are updated using the Awards routine from the Main Menu, and Year to date hours may be re-set from General Reports, Year to Year Reports on either a calendar or fiscal beginning.

The **'Emergency/Additional'** tracks **emergency contact info**, physician phone numbers, spouse combined label and dues. The physician's phone number is a sixty-character entry, for multiple phones and other data. The spousal label removal allows a combined label to be sent to one of a couple; by checking the eliminate box, that person will not get a label – this is **only** for the labels under Volunteer Lists.

On the General tab there are options to enter assigned work areas, skills and a general rich text memo. The available work areas and skills are entered under Setup and Utilities, Code Files.



The screenshot displays a 'Volunteer Record' form. On the left is a solid blue vertical bar. The form fields are as follows:

- Email:** Text box containing 'Herelam@home.com'.
- Vol Type:** Dropdown menu set to 'Adult'.
- Date of Birth:** Calendar icon next to '06/21/1977'.
- Gender:** Radio buttons for 'Male' and 'Female', with 'Female' selected.
- Referred From:** Dropdown menu set to 'Del Mario H. S.'.
- Marital Status:** Dropdown menu set to 'Married'.
- Work Status:** Dropdown menu set to 'Employed'.
- Date Confidentiality Statement Signed:** Calendar icon next to '08/28/2008'.
- Work Areas:** A box containing 'Volunteer Department' and 'Substance Abuse Center' with '+' and '-' buttons.
- Skills:** A box containing 'Computer Input', 'Word Processing', and 'Internet User' with '+' and '-' buttons.
- Languages:** A box containing 'Spanish' with '+' and '-' buttons.
- Memo:** A rich text editor with a toolbar (Normal, Times, 3, Black, Bold, Italic, Underline, etc.) and a text area containing 'Sample text for memo field'.

(remainder of Volunteer Record screen)

Skills (also used for groups) will track 9,999 different entries (Code Files) and a volunteer may have multiple skills assigned.

Volunteer Edit

Locating a Volunteer uses the Search By Last name, First name or volunteer number. The search entry is case insensitive and will accept partial entries of last or first name. For name entries, clicking the 'Search' will present the matches in the grid; numbers must be entered will not search partial numbers.

Editing a record is basically the same as entering, and the 'Save' button must be clicked on completion. The 'Cancel' will reverse changes made. Changes may be made on all four tabs before clicking on 'Save.'

Moving between tabs will preserve all data presentation except when going back to the General tab where the skills and assigned work areas may not be refreshed.

Note – Deleting a volunteer from this screen using the ‘Delete’ button will NOT provide an option to Archive that volunteer. **Warning** - If you proceed, currently support data will not be deleted (work hours, medical tests, etc.). However, it is a distinct possibility that in the future, these data will be removed from ALL associated tables (including Work Hours) in a deletion!

Buttons

Work Data – All the posted work data for the volunteer selected is shown. Information may be added, deleted, changed or printed out. When making changes in the area, do NOT press Save on the volunteer record after closing the Work Data screen.

Medical Tests and Training Programs may also be entered under their respective buttons on the Main Menu, as well as with these buttons.

Daily Schedule – Data from all Monthly Schedules that have been built are shown for the selected volunteer.

Master Schedule Entry – Entry into the Master Schedule can be accomplished here as well as on the Main Menu, Scheduling.

See Office This button posts a message ‘Please see office before signing in.’ to the sign in system.

Personal Message – A personal message may be written and posted on the sign in system.

Send Email – Email is sent directly from VoltrakWeb. There is an attachment size limit of 1MB. Currently the return address is the address in the Master Setting (Setup and Utilities); by Fall of 2011, the return address will default to this address unless there is an email address entered for the password being used to gain access to VoltakWeb.

Load Picture – Photo ID’s may be imported into VoltrakWeb. See manual section on Photo ID for instructions on Photo ID procedures. We highly recommend using a bmp format.

Delete Picture – removes current Photo ID.

Profile – The Individual Profile presents the volunteer information of the four tabs, assigned work areas, skills, languages, medical tests, training programs and Master Schedule. Unless a large number of work areas or skills, e.g., are assigned, the printout will be one page. Options include a profile with or without the volunteer’s memo.

Volunteer Lists

This submenu option brings up a complete Print Menu screen for many of the lists available for the volunteers. Multiple lists may be requested. Any item on the list, and options at the bottom of the screen, can be easily ‘filtered’ by Volunteer Type, Status, Skills, Work Areas or Language.

Volunteer Lists	
»Work Data	
Medical Tests	
Training Programs	
Scheduling	
»Awards	
»General Reports	
»Setup and Utilities	
Sign In Utilities	
Applicant Tracking	
Report Generator	
Logout	

1. Select Printout

☐ Name List
 ☐ Individual Profiles without Memo

☐ Name List with Phone
 ☐ Individual Profiles with Memo

☐ Address/Phone List (Landscape)
 ☐ Birthday List

☐ Address List (3 Column)
 ☐ Order by Day

☐ Emergency Phone #'s
 ☐ Birthday List Labels

☐ Assigned Work Areas
 ☐ Labels

☐ Referral Source
 ☐ Email List with No Email Address

☐ Accumulated Hours
 ☐ Email List with Email Address

☐ Sort By Hours
 ☐ Export Data Only (Dbf Format)

☐ Name/Volunteer Status

2. Select Limitations (optional)

☐ Types

☐ Adult
 ☐ Junior
 ☐ Aux Member
 ☐ RSVP
 ☐ Community Service
 ☐ Student

☐ Skills

☐ Status

☐ Active
 ☐ Pending
 ☐ Inactive
 ☐ Resigned
 ☐ OnLeave

☐ Work Areas

☐ Language

Chinese

Select Limitations ONLY to limit to specific items. If not checked, all Types and Status will be used automatically; Skills and assigned Work area will be ignored.

3. Order of Presentation

☒ Alphabetical
 ☐ Volunteer Number
 ☐ Zip Code

4. Optional Functions

(‘Print’ not shown)

The filters for Volunteer Type and Status are selected by checking off the filter checkbox first, then selecting one or more of the individual checkboxes. Skills (and Groups) and Work areas are selected by clicking on the ‘+’ button, then selecting one or more by using a single click (one selection) or Ctrl-Click for selecting more than one. Blocks of items can also be selected by clicking on the first one to be selected, then using Shift-Click on the last of the items. This is used primarily if groups are set up that all begin with the same alpha description, like grouping High Schools (HS-Ardmore, HS-Central High, HS-Lakeside High).

Labels use a 30 per page label sheet; a test print out on blank paper, one page, should be used to adjust the margins to accommodate both the data as presented in a PDF format and the particular printer being used. (Setup and Utilities, Label Sizes). A partial first sheet may be used by indicating the number of labels already used on that sheet (‘blank’ labels). Note that label printing is down each column, not across the row.

Send Email is a multiple address email routine and will send emails to those volunteers selected. Although a 'list' is not required, it is advisable to also request a Name List; those without email addresses are automatically dropped. 'Send Email' requires that the email server has been setup.

Send Message to Signin sends a message to all volunteers selected.

General information on sending a group email or message to the volunteer message center

Select filters first then click on 'Send Email' or 'Send Message to Signin.' Once a group message is sent, the selections on the Volunteer List menu will remain should a name list of those to whom a message was sent is desired.

Note that there are also list prints for those with email addresses and those without. If you are not sure who is getting emails, request the list of those with email addresses. Volunteers with no email addresses are automatically dropped from the emails sent. Volunteer email addresses have a 'reliability' problem based on addresses being frequently changed, not having an email, and a significant issue with error in inputting the correct address. Printing out those with emails will serve as a worksheet to correct invalid formats, at least.

Several issue may arise in sending a group email:

1. If an email address has an invalid format, it may cause a cessation of the sending process; a group message is not sent as a 'CC:' to all on the list, but rather an individual email is sent to each by parsing through the selected volunteers.
2. If an email address has a valid format, but is not a valid address, an undeliverable message will be sent back.
3. If an email address has a valid format and a valid address, but the address is not correct for that volunteer, it will go to whoever has that address; there is not way of knowing when this happens unless the recipient answers that email indicating they were not the intended recipient.

Volunteer Lists

1. Select Printout

<input type="checkbox"/> Name List	<input type="checkbox"/> Individual Profiles without Memo
<input type="checkbox"/> Name List with Phone	<input type="checkbox"/> Individual Profiles with Memo
<input type="checkbox"/> Address/Phone List (Landscape)	<input type="checkbox"/> Birthday List
<input type="checkbox"/> Address List (3 Column)	<input type="checkbox"/> Order by Day
<input type="checkbox"/> Emergency Phone #'s	<input type="checkbox"/> Birthday List Labels
<input type="checkbox"/> Assigned Work Areas	<input type="checkbox"/> Labels
<input type="checkbox"/> Referral Source	<input type="checkbox"/> Email List with No Email Address
<input type="checkbox"/> Accumulated Hours	<input type="checkbox"/> Email List with Email Address
<input type="checkbox"/> Sort By Hours	<input type="checkbox"/> Export Data Only (Excel Format)
<input type="checkbox"/> Name/Volunteer Status	<input type="checkbox"/> Combined Labels

2. Select Limitations (optional)

☐ Zip Code

4. Labels - enter the number of Blank Labels on the first sheet

Use only 30 labels per sheet; labels are generated from the top of the column down, not across.

There MUST be more than one record being requested.

5. Optional Functions

Send Email

Send Message to SignIn

Print

After printing the menu will be re-displayed, including the previous selections, to allow a second printout of a different list, adjustment of the filters, or printing out a list of volunteers to whom a message was sent.

No Work Start Date

The submenu is a direct print request to list those volunteers that did not have a work start date entered. Work start date is the basis of the Longevity reporting system (General Reports).

Volunteer Dues

This is a print menu for tracking Volunteer Dues and is based on two fields: the due date of the dues and the amount. These values are entered on the Volunteer Record, Emergency/Addt'l tab.

Work Data

This screen has four submenus:

1. Post Work Data
2. Post Daily Sign In Sheet
3. Edit Work Data Records
4. Reports

Note that when hours are posted manually, through the scheduling system, or by the volunteer sign in system, the Last Date Worked, Last Work Area, Career Total Hours and Year to Date Hours in the volunteers' records are automatically updated. If hours are edited or deleted, the Total Career Hours and Year to Date hours are corrected. The Last Date Worked is only updated if the date being posted is more current than the existing date in the record. If hours are posted to a future date (usually in error) then deleted or corrected, the Last Date Worked will not be corrected and will remain in the volunteer's record until hours are posted to a more current date. However, it can be corrected manually.

Note that Volunteer Type is automatically entered with each posted work data record.

Post Work Data

This submenu provides for manual posting of work hours by staff, either by time in and time out, or bulk hours; the default presentation of these options can be changed under Setup and Utilities, Miscellaneous Defaults. Posting may be done by volunteer number or by name (default is also under Miscellaneous Defaults). Having the volunteers use their number on a manual daily sign in sheet (and the work area number, if possible), and using these numbers in the posting, is the quickest way to manually post hours.

The selected volunteer's Last Work Area will appear in the Work Area drop down selection box automatically, and can be changed.

Note that the printout of posted hours will be for the current posting session. If the screen is closed by going to another item on the Main Menu, then the Posting is returned to, only the new hours being posted will appear on the print out.

Post Daily Sign In Sheet

Posting the Daily Sign in Sheet is used specifically to post hours from Scheduling, Print Schedule. The Daily Sign In Sheet that was printed from this menu item is redisplayed in a Grid and may be edited prior to requesting the automatic posting.

If you bring up a Sign In Sheet for posting by mistake, you may correct the date or go to another menu item. Posting a full day's hours by mistake can only be corrected by deleting each record posted using the 'Edit Work Data Records' folder, below. If this should happen, use the Scheduling System to print out the day incorrectly posted as a worksheet for deletion.

Edit Work Data Records

This folder is generally used for hours that have been posted in error. The data in the Grid may be presented either in order of Work Date or Volunteer Name. Additionally, the data may be restricted to:

- One volunteer
- Work Area(s)
- Date Range
- Volunteer Type(s)
- Volunteer Status

Since there may be thousands of records these filters are helpful in limiting the amount of data to sort through, as well as let you present the data in a specific fashion depending on the nature of the error. Volunteer Status is an option used to look at work data for Resigned volunteers, to make sure there are no data in the table prior to deleting volunteers. (See Deletion and Archiving.)

The ‘Print Selected Records’ gives you a quick way of printing the data that appears in the Grid.

Reports

This print menu presents various ways work data may be printed. Data may be presented in order of Date, Volunteer Name, or Work Area. The request may be filtered to certain Volunteers, Work Areas, Volunteer Types, and Date Range.

»Volunteer Records
»Work Data
Post Work Data
Post Daily Sign In Sheet
Edit Work Data Records
Reports
»Medical Tests
»Training Programs
»Scheduling
»Awards
»General Reports
»Setup and Utilities
»Sign In Utilities
»Applicant Tracking
Logout

WORK DATA REPORTS

1. Presentation, Select One (required)

☒ Date Worked
☐ Volunteer Name
☐ Work Area

2. Select Filter(s), (optional)

☐ Volunteer Name
☐ Work Areas
☐ Types
☐ Date Range

From Date
To Date

Note: Filters are for selecting specific items (date ranges)
If not checked all items (dates) are used.

Print

Scheduling

The Scheduling System is one of the more involved features of VoltrakWeb, and requires careful reading of the instructions. There were several difficult tasks to accomplish in designing a scheduler for volunteers. If there were only several volunteers per day per work area, the tasks would be simple, and the screen display and printout would look like a calendar. However, our system must accommodate the possibility of dozens of volunteers working the same day in the same work area. Take this amount of data times thirty days and the sheet of paper would have to be the size of a tabletop!

Another difficult task was to avoid having to enter a volunteer on the schedule for each date worked. For example, if a volunteer worked every week Monday, Wednesday and Friday, this would require approximately 155 entries for just one year.

VoltrakWeb's Scheduling System has been designed to make schedule entries minimal, screen displays easy to scan, and printouts that can handle unlimited number of volunteers scheduled for a work area or project.

Edit Master Schedule Plan

The **Master Plan** of VoltrakWeb's Scheduling System carries a format of a volunteer's schedule; for any day (Monday through Sunday) the format can be weekly, biweekly or a single day. A Biweekly entry would begin on either week 1 or week 2, and a single entry would be for a certain week (e.g. 3).

Scheduling a Volunteer or Editing an existing record are accomplished on the same screen - To schedule a volunteer, follow these steps:

1. Select the work area in the upper right (volunteer already entered will appear in the grid).
2. Click on Add
3. Use the drop down box to select the volunteer (see general conventions on quick locating with a drop down box)
4. Enter the time in and out – use the format HH:MMAM (or PM); note that noon is 12:00PM.
5. Click on the day of week
6. Click on the frequency:
 - A **single** occurrence is one day during the month in a specified week
 - Weekly** is the day entered, every week
 - Bi-weekly** is every other week beginning with either week 1 or 2
7. Enter the week only for a single or bi-weekly schedule

For example, if a volunteer works Monday, Wednesday, and Friday on a weekly basis, three entries are required, one for each of the days. This format can then produce monthly schedules forever for this volunteer. NOTE on Biweekly schedules: if, e.g., a volunteer works Monday, biweekly, beginning in week 1, and there is no occurrence of Monday in Week one, the next work day will be in week three, NOT the first occurrence of Monday.

»Volunteer Records
»Work Data
»Medical Tests
»Training Programs
»Scheduling
View Schedules
Edit Master Schedule Plan
Print Schedules
Build a Month's Schedule
»Awards
»General Reports
»Setup and Utilities
»Sign In Utilities
»Applicant Tracking
Logout

SCHEDULE EDITOR

AddPrint
Work Area: 3 Main

	FullName	Time In	Time Out
View Delete	Adams, Jane J	8:00 AM	1:00 PM
View Delete	Blanchard, Marsha	10:00 AM	3:30 PM

Volunteer Name

Time in: 08:43PMTime out: 08:43PM

Week Day
☒ Monday
☐ Tuesday
☐ Wednesday
☐ Thursday
☐ Friday
☐ Saturday
☐ Sunday

Schedule for
☐ Single Day
☒ Weekly
☐ Bi weekly
Week:

SaveCancel

For example, if a volunteer works Monday, Wednesday, and Friday on a weekly basis, only three entries are required, one for each of the days. This format can then produce monthly schedules forever for this volunteer. NOTE on Biweekly schedules: if, e.g., a volunteer works Monday, biweekly, beginning in week 1, and there is no occurrence of Monday in Week one, the next work day will be in week three, NOT the first occurrence of Monday.

Build a Month's Schedule

The Monthly Schedules are built on demand from the Master Plan in three ways:

1. Selecting 'View and Print Schedules' from the Main Menu Schedule button. If the **current** Month's schedule has not been built, a message will ask you if you want to build it.
2. From 'View and Print Schedule,' if viewing a month already built and select a different month to view and that month has not been built, the message to build it will appear.
3. Select 'Build Schedule' from the Main Menu Schedule button and enter the Month and Year.

Changes in the Master Plan

Changes in the Master Plan will only affect schedules that have not yet been built. This difference is quite significant because rebuilding a month's schedule does not remove and rebuild any of the previous schedule entries for that month.

Rebuilding a schedule from a change in the Master Plan WILL add volunteers that have been added to the Master Plan after that month has been built. A month's schedule is not affected if the volunteer's Master Plan was simply changed, i.e. moved from Monday (weekly) to Wednesday (weekly), and rebuilt. Therefore, VoltrakWeb can preserve volunteers marked as absent or deleted. The system will only add volunteer (numbers) from the Master Plan that are not in the built schedule.

To have changes in the Master Plan reflected in the month's schedule, two options may be used:

1. Delete all records in the built schedule of the volunteer whose schedule has changed, then rebuild that month; the schedule will then treat that volunteer as a 'new' entry.
2. If the edits to the month's built schedule were not performed, or do not have to be preserved, then purge that month's schedule and build a fresh one. Note that purging a month, for example June, will remove June and all previous months. This should be done routinely to remove past data. Purging built schedules is done under Setup and Utilities.

To completely redo a month's schedule, i.e. start from 'scratch,' delete the month (below) and build it again. Remember that this will remove all edited changes.

View Schedules

This screen presents a week's schedule for a selected Work Area. When the screen first appears, the current week appears. To view a schedule, select a Work Area from the list box at the top of the screen; click on the box and type in known letters of the Work Area to reposition the list. Use the 'Week' and 'Month' boxes to view the schedule for different weeks or months. If a month and week are selected for a Work Area, and the Work Area is changed, the same week and month are displayed for the new Work Area.

If a month is selected that has no schedule built as yet, a message to that effect will appear, and the schedule may be built at this time.

Use the Reports button to view (and/or print) a Schedule for a selected day (or date range) listing all Work Areas. Use Volunteer Schedule for an alphabetical list, and Work Area to have the list grouped by Work Area. Have the Preview box checked for viewing.

Editing a built schedule

Once a schedule has been built, there are three different ways that it may be changed, none of which will affect the Master Plan:

1. Marking a volunteer as 'Absent' leaves the volunteer in the schedule, but not on the schedule views, printouts or postings, except on a special printout of absentees. Absent flags can only be removed from the Volunteer record using the button 'Schedule.'
2. Deleting a volunteer from the schedule. This removes the volunteer completely from the schedule, including the absentee lists, and cannot be retrieved.
3. Changing the date of a specific item. This allows movement of a volunteer's shift from one date to another.

When marking Absent or Deleted, a choice is given to have the change affect only the date (and work area) selected, or to have the change take place over a date range (for all work areas).

To change a volunteer's schedule:

1. Select View Schedules

2. Select the Work Area, Month, Year and week to change
3. Locate the volunteer to change
4. Select Change Date (date range will appear), Absent, or Delete
5. If Absent or Delete are selected, your choice is for just that date and work area (if Absent, they will still appear on the schedule printout, marked as absent, see below)
6. If a range of dates is selected, all work areas will be affected.

Absent? If a volunteer happens to be gone for a few weeks, the entries for the Monthly Schedule can be **flagged as 'Absent.'** This is helpful, because now VoltrakWeb can give you a printout of all scheduled volunteers that aren't going to be there, by Work Area.

For example, if a volunteer is going on leave for two weeks, select any date they are scheduled, **right** click on the record, select Absent by Date Range from the popup Menu, and enter the inclusive dates. This automatically removes them from all printouts without having to rebuild the schedule. Additionally, requesting an absentee report lists all absentees for a selected date range so that substitutes may be called.

Gone? If a volunteer has left for an indefinite period you can choose 'Delete' and delete them from all schedules that have been built by date range. If there is a serious question if they are returning at all, remove their records from the Master Plan as well; it only takes a minute to put them back in when they return. Of course, deleting a volunteer from VoltrakWeb will remove them from all month's schedules and the Master Plan.

Schedule Printing

The Print Request menu for Scheduling may be accessed directly under Scheduling on the Main Menu, or from the Schedule View screen with the button 'Reports.' All reports may be filtered by Single Volunteer, Volunteer Type(s), Work Areas and Date Range. The Date Range filter is mandatory. As a reminder, if all work areas (types) are to be chosen do not check these filters; VoltrakWeb assumes you want all if no filter is requested.

- »Volunteer Records
- »Work Data
- »Medical Tests
- »Training Programs
- »Scheduling
- View Schedules
- Edit Master Schedule Plan
- Print Schedules
- Build a Month's Schedule
- »Awards
- »General Reports
- »Setup and Utilities
- »Sign In Utilities
- »Applicant Tracking
- Logout

SCHEDULER PRINT MENU

1. Presentation, Select One (required)

☐ Daily Sign In Sheet
☐ Work Area Schedules - continuous
☐ Work Area Schedules - separated
☐ Volunteer Schedules - continuous
☐ Volunteer Schedules - separated
☐ List of Absentees by Work Area

☐ List of Absentees by Date
☐ List of Absentees by Volunteer
☐ Labels
☐ Export (name and address)
☐ Master Plan (Options 2 and 3 not used)

2. Select Filter(s), (optional)

☐ **Volunteer Name**

Adams, Jane J
 Allain, Kristy A
 Allen, Dorothy A.
 Anderson, Ruth L
 Bain, Barbara M
 Barreto, Mary Jane
 Becraft, William A
 Bell, Mary H
 Bissell, Donald C
 Blanchard, Marsha
 Brinkley, David J

☐ **Work Areas**

+ -

☐ **Types**

☐ Adult

☐ Community Service

☐ RSVP

☐ Aux Member

☐ Junior

☐ Student

Note: Check ONLY to limit (filter) the report to seleted items (e.g. Work Areas). If not checked, all items (e.g all volunteers) are used.

3. Date Range, inclusive (Required, except for Master Plan)

From:
 To:

Daily Sign In Sheet prints out daily schedules for the date range selected, alphabetized, with a place for the volunteer to initial. Changes or no shows for the day should be highlighted for easier identification when the sheet is posted. See Work Hours, above, for automatic hours posting from the sign in sheet.

Work Area schedules may be printed either in a continuous format (one work area after another), or separated (separate report for each work area) in a Memo Style format that may be forwarded to each Work Area. If a Schedule changes for a particular work area, just that work area's schedule may be printed.

Volunteer schedules are similar to Work Areas, being available in either a continuous format or separated by volunteer. Caution, although it is nice to have a separate schedule sheet for each volunteer to give them, 400 scheduled volunteers means 400 sheets of paper, at an average of 5 cents per page. However, if a volunteer is asking about their schedule, remember that the print request can be viewed, and then cancelled. Additionally, a volunteer's current scheduled dates for all months that have been built are available in the Volunteer Record with the button 'Schedule.'

Absentees, volunteers that are scheduled but ‘flagged as absent’ on selected dates of a Month’s schedule (not the Master Plan), may be printed in order of Work Area, Date, or Volunteer name.

Master Plan printing is available from the Schedule Print Request screen and from a button on the Master Plan screen. Note that the filter and date range selections on the Print Request screen do not apply to the printing of the Master Plan. The format is by Volunteer, listing their schedule format.

Deleting Schedules

It is very important to the efficiency of your database to Delete previous months’ schedules. To delete a schedule, click on the submenu Purge Schedules under Setup and Utilities. There is no reason to carry any schedule for a past month, as the Master Plan will provide the information on a volunteer’s schedule. Purging remove all back schedules from the month/year selected.

Awards

VoltrakWeb's Award Tracking System is fully automatic after the initial setup. Awards are based on a volunteer's Total Career Hours (accumulated hours) **at the time the Award Calculations are requested** and are compared against two different award levels based on the Volunteer Type.

VoltrakWeb tracks **only** the last award level received and date received, and the award level that is due. This information can be viewed on the Award screen, and for each volunteer, the information appears in the Volunteer Record under the Work Related tab.

Award Setup

There are two levels of awards (A and B) that track the first nine levels of awards given, then an incremental level that is added to the ninth and continues at that incremental increase. Award levels are based on Volunteer Types.

»Volunteer Records

»Work Data

»Medical Tests

»Training Programs

»Scheduling

»Awards

»General Reports

»Setup and Utilities

Code Files

Select Vol. to Archive

View/Retrieve Arc. Vol.

Arc./Ret. Daily Work

Arc./Ret. Yr. End Sum.

Purge Schedules

Set Award Levels

Set Label Size

User Passwords

Master Settings

Audit Log

Miscellaneous Defaults

»Sign In Utilities

»Applicant Tracking

SET AWARD LEVELS TO VOLUNTEER TYPE

Each Volunteer Type must have an associated Award Level Setup of A or B. See the Setup descriptions below.

	Volunteer Type	Award A or B
Edit	Adult	A
Edit	Aux Member	A
Edit	Community Service	A
Edit	Junior	B
Edit	RSVP	A
Edit	Student	B

Award Levels. The last level is an incremental level, increasing each award level after the ninth by that amount.

	A Levels	B Levels
First	<input type="text" value="100"/>	<input type="text" value="50"/>
Second	<input type="text" value="250"/>	<input type="text" value="100"/>
Third	<input type="text" value="500"/>	<input type="text" value="150"/>
Fourth	<input type="text" value="750"/>	<input type="text" value="200"/>
Fifth	<input type="text" value="1000"/>	<input type="text" value="250"/>
Sixth	<input type="text" value="1500"/>	<input type="text" value="300"/>
Seventh	<input type="text" value="2000"/>	<input type="text" value="350"/>
Eight	<input type="text" value="2500"/>	<input type="text" value="400"/>
Ninth	<input type="text" value="3000"/>	<input type="text" value="450"/>
Incremental	<input type="text" value="500"/>	<input type="text" value="50"/>

Cancel Changes

Save Changes

To set up the Award Levels:

1. Select Setup and Utilities from the Main Menu

2. Select Set Award Levels
3. Fill in Level A (and B for the second award levels, if used) with the first nine levels of awards
4. Enter the incremental level; this will be continually added to the previous level. Above, in the A Levels the 10th would be 3500, the 11th 4000, etc.
5. Assign each Volunteer Type a Level (A or B)
6. EVERY TYPE MUST HAVE A LEVEL A OR B ASSIGNED
7. Do not assign a B Level unless all level values are entered
8. If there are volunteer types that do not get awards, Level B can be used by setting the starting levels higher than would be attained (50000, 50001, 50002, etc. with an incremental of 1)

Award Calculations

Note that Awards are calculated on current Total Career Hours. If there is a 'shut off date' for awards, e.g., the end of the year, then run the calculations before posting any hours for the new year. Having a shut off date several months before awards were given was traditional because of the time needed to determine the volunteers receiving awards. With VoltrakWeb, the calculations may be run several months before to determine the approximate numbers of each level of award due, then run again closer to the award ceremony to include as many volunteers as possible.

This Award grid may be accessed directly for changes; be sure to click on Update if any row changes are made before moving to a different row.

<ul style="list-style-type: none"> »Volunteer Records »Work Data »Medical Tests »Training Programs »Scheduling »Awards Awards Global Update Report/Export Selections »General Reports »Setup and Utilities »Sign In Utilities »Applicant Tracking Logout 	AWARDS							
	Award Calculation		Search by		<input type="radio"/> Last <input type="radio"/> First <input checked="" type="radio"/> Number		<input type="text"/>	Search
	Update	Cancel	Last Name	First Name	Last Award	Date Received	Award Due	Career Hours
	Update	Cancel	Adams	Jane	500	09/30/2005	750	900
	Update	Cancel	Allain	Kristy	1000	08/31/2007		1290
	Update	Cancel	Allen	Dorothy	6000	09/30/2001	6500	6970
	Update	Cancel	Anderson	Ruth	1500	09/30/2005		1961
	Update	Cancel	Bain	Barbara	2000	09/30/2005	2500	2528
	Update	Cancel	Barreto	Mary Jane	1500	08/31/2007	2000	2303
	Update	Cancel	Becraft	William	500	09/30/2006	750	991
	Update	Cancel	Bell	Mary	2000	09/30/2006		2401.25
	Update	Cancel	Bissell	Donald	2000	09/30/2005	2500	2540
	Update	Cancel	Blanchard	Marsha	6500	09/30/2005		6817.5

The first time the calculations are run (if award levels were not entered on a data conversion), all volunteers that have passed an award level will be flagged as 'due.' This means that if you have entered previous volunteers into VoltrakWeb that have Total Career Hours from previous years, they will be flagged. There are several options to correct the system so subsequent years become automatic. Assuming all volunteers have been flagged:

1. Use the Award Grid to delete all awards from the due column for those that have already received that award. Note that this is time consuming, particularly if you have a large volunteer database.

2. An easier way would be to do the awards manually this first time, do the Award Calculations and then a Global Update (below). This will move all awards due to the award received column with the date entered on the Global Update. The system is now ready for automatic award calculations for the next year. Note that this will place an inaccurate date in those volunteer records whose award was given in past years; however, in subsequent awards received that date will be replaced with the new award date.

Posting Awards Received and Record Edit

Posting Awards Received is also completely automatic with VoltrakWeb. Simply click on the Global Update button and enter the date to which you want the awards posted (received). That's it!

If you need to post past awards, or edit the Awards in any way, you may edit the information directly in the Award Grid (above). Use the standard search at the top to locate a volunteer or use the bar at the right.

If you want to set an award due for any volunteer that is 'close' to receiving an award, this can be done with the edit

Award Printing

Click on Reports/Export function submenu of Awards to view the Print Menu for Awards. Alphabetical listing may be limited to only volunteers with awards due. Listing of Awards by levels list the volunteers (and count them) in each level from your Award Level Setup. Levels A and B are always separated into different reports.

Should a local word processor be chosen to write a merge letter to those receiving awards, VoltrakWeb has both data export and label printing.

Medical Tests and Training Programs

VoltrakWeb will track 9,999 Medical Tests and 9,999 Training Programs, each volunteer being assigned to as many as needed. For Medical Tests, Test Date, Due Date and Results are tracked; for Training Programs, Beginning Date and Completion Date are tracked. Entering a new Medical Test or Training Program is done under Setup and Utilities, Code Files.

Medical Tests are designed to be repetitive (but don't have to be), such as TB, which is usually an annual test. Training Programs, on the other hand, usually are given to a volunteer only one time. If you have a repetitive Training Program, use the Beginning Date as the next date the program is to be given (as Due Date for a Medical Program) and Completion Date as the date of the last program.

Tracking the history of medical tests and training programs is not recommended. For all practical purposes, particularly with a medical test, the only pertinent information is whether the volunteer has had the test (program), and if it is a recurring test (program) are they current.

Entering Volunteers

Medical Tests and Training program screens, volunteer entry and printing are essentially the same, so only the Medical Tests will be covered.

There are **two methods for entering and updating** medical test records, from the Main Menu, Medical Tests, submenu Medical Tests or directly from the Volunteer Record using the brown button 'Medical Tests.' The main difference is in convenience. If the data to be entered are for multiple volunteers, then the entry is quicker using Medical Tests from the Main Menu; the volunteer search is the same, but only the medical data section is displayed. If other information besides the medical test are being entered for a volunteer, then the more convenient entry would be under the Volunteer Record.

Entry under Main Menu, Medical Tests, then Medical Tests presents the volunteer search. When the volunteer is selected, the lower portion of the screen will display all tests available for that volunteer. If the history of tests are being tracked (not recommended), then a filter can be applied to limit the list to a single test.

To add a new record, click on the 'Add' button and complete the entry. If the test data are for a test already having a record, we recommend that 'View' is used to change the dates in the existing test record rather than add additional records for the same test.

»Volunteer Records

»Work Data

»Medical Tests

Medical Tests

Standard Letter

Reports

»Training Programs

»Scheduling

»Awards

»General Reports

»Setup and Utilities

»Sign In Utilities

»Applicant Tracking

Logout

MEDICAL TESTS

Search by
☐ Last
☐ First
☒ Number

	VN	Title	First Name	Last Name	Nickname
Select	53		Jane	Adams	
Select	90		Kristy	Allain	
Select	100		Dorothy	Allen	
Select	42		Ruth	Anderson	

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z ALL

Medical Test Filter

	Medical Test	Test Date	Results	Due Date
View Delete	TB Test	10/05/2007	Neg	10/05/2008

Medical Test for Adams, Jane J

Medical Test

Test Date
Results

Due Date

If the Medical Test button is being used under Volunteer Record, there is no option to filter the tests to a specific test.

Work Data

Medical Tests

Training Program

Daily Schedule

Master Schedule Entry

See Office

Volunteer Record

General

Title

Nickname*

SS No.*

Address*

City*

Home Phone*

Voltrak® Software | Benan Systems - Windows Internet Explorer

http://119.93.91.53/VolTrakWeb/medicaltest.aspx?vn=40

VOLUNTEER'S MEDICAL TEST DATA

Medical Test Data for : Meister, Adao

From :
To :

	Medical Test	Test Date	Results	Due Date
Select	TB Test	08/11/2007	Neg	08/11/2008
Select	Hepatitis	01/14/2006	Neg	01/14/2008

Printing

VoltrakWeb provides Lists, Letters, Labels and Export for Medical tests under Main Menu, Medical Tests, then Reports.

The screenshot shows the 'MEDICAL TESTS' section of the VoltrakWeb interface. On the left is a blue sidebar menu with options: »Volunteer Records, »Work Data, »Medical Tests, Medical Tests, Standard Letter, Reports, »Training Programs, »Scheduling, »Awards, »General Reports, »Setup and Utilities, »Sign In Utilities, »Applicant Tracking, and Logout. The main content area has a yellow header 'MEDICAL TESTS' and a dropdown menu 'Select Medical Test First' with 'MMR' selected. Below this are five numbered sections: 1. Select Printout (with checkboxes for List, Letters, Labels, Export, and a note for volunteers not entered), 2. Select Limitations (optional) (with checkboxes for Volunteer Type and Status), 3. Order of Presentation (with radio buttons for Alphabetical and Due Date), 4. Select Inclusive Start Dates (with checkboxes for date range and input fields for Beginning and Ending Dates), and 5. Labels - enter the number of Blank Labels on the first sheet (with a text input field set to 0 and explanatory text). An 'Edit Letter' button is next to the 'List' checkbox, and a 'Print' button is at the bottom right.

MEDICAL TESTS

Select Medical Test First MMR

1. Select Printout

☐ List Edit Letter

☐ Letters

☐ Labels

☐ Export

☐ List for Volunteers not entered
(Options 3 and 4 below not applicable)

2. Select Limitations (optional)

Volunteer Type		Volunteer Status	
<input type="checkbox"/> Adult	<input type="checkbox"/> Junior	<input type="checkbox"/> Active	<input type="checkbox"/> Pending
<input type="checkbox"/> Aux Member	<input type="checkbox"/> RSVP	<input type="checkbox"/> Inactive	<input type="checkbox"/> Resigned
<input type="checkbox"/> Community Service	<input type="checkbox"/> Student	<input type="checkbox"/> OnLeave	

3. Order of Presentation

☒ Alphabetical

☐ Due Date

4. Select Inclusive Start Dates

☐ (Date Range Required for Letters)

Beginning Date 01/18/2011

Ending Date 01/18/2011

5. Labels - enter the number of Blank Labels on the first sheet

0 *Use only 30 labels per sheet; labels are generated from the top of the column down, not across.*

There MUST be more than one record being requested.

Print

Before choosing any print options a Medical Test (Training Program) must be selected from the drop down box.

Reminder Letters are ‘merged’ for you automatically. VoltrakWeb supplies this portion of the letter:

June 12, 2011

Jane Adams
80 Seaview Court # 503
Scottsdale, AZ 79827

Dear Jane:

The following Medical Test is due:

TB Test
Beginning: Monday, June 13, 2011

The remainder of the letter is from the letter you have written under Medical Tests , Standard Letter from the Main Menu, or from the Edit Letter button on the Medical Print Menu. This letter body should be written, if possible, as a generic letter that will apply to all medical tests. It can, of course, be easily changed depending on the Medical Test selected. Note that VoltrakWeb uses New Times Roman, 12 point for the first part of the letter.

Export provides an excel sheet of the names, addresses and test dates of the volunteers should a local mail merge be desired.

List for Volunteers not entered lists all volunteers that have not been entered in the database for the test selected. This is of particular importance to check to make sure all volunteers that require certain tests have had these tests added to their Volunteer Record. Without a record entry, these volunteers will not show up on any list for that test, and can easily be overlooked. This list, along with a standard list based on a due date range ending prior to the current date, gives you both those **volunteers that are not scheduled as well as those that are overdue**.

General Reports

Inactivity/Activity

The **Inactivity** feature of VoltrakWeb is based on the last work date of volunteers (Volunteer Record, Work Related tab), and provides reports for those not having worked (posted hours) since a selected date or for a specified number of days. Filters are available for Volunteer Type and Status, and you may specify the order as Alphabetical or by Last Day Worked.

This feature is particularly useful in providing a list of volunteers not having worked recently that can be used as a worksheet to determine those volunteers that should be resigned and archived.

» Volunteer Records

» Work Data

» Medical Tests

» Training Programs

» Scheduling

» Awards

» General Reports

Inactivity/Activity

Longevity

Monthly Calculations

Monthly Reports

Year End Reports

Year to Year Comparisons

Volunteer Statistics

» Setup and Utilities

» Sign In Utilities

» Applicant Tracking

Logout

ACTIVITY/INACTIVITY REPORTING

1. Select Printout

☐ List

☐ Letters

☐ Labels

☐ Export

Edit Letter

2. Select Limitations (optional)

Volunteer Type

Volunteer Status

☐ Adult

☐ Active

☐ Aux Member

☐ Inactive

☐ Community Service

☐ OnLeave

☐ Junior

☐ Pending

☐ RSVP

☐ Resigned

☐ Student

3. Order of Presentation

☒ Alphabetical

☐ Last Day Worked

4. Select Work Date Limit

☒ Not worked since (Inactivity)

☐ Worked from (Activity)

☐ Not worked for (Inactivity)

☐ Worked for (Activity)

Date01/18/2011

of days0

Selections for 4 are either those not working (Inactivity) or for those having worked (Activity). Note to change the body of letter if using it for 'Activity'.

5. Labels - enter the number of Blank Labels on the first sheet

0

Use only 30 labels per sheet; labels are generated from the top of the column down, not across.

There MUST be more than one record being requested.

Print

The **Activity** feature provides the same information as above except for those volunteers working.

Letters apply only to Inactivity. These letters are partially mail merged from the database with the remainder of the letter written by the user with the 'Edit Letter' button on the print menu.

The first part of the letter is:

June 12, 2011

Jane Adams
80 Seaview Court # 503
Scottsdale, AZ 79827

Dear Jane:

Our records show that you have not volunteered since 6/30/2008.

Longevity

The Longevity Reporting System is based on the volunteers' Work Start Date. If you are not sure if all volunteers have this date, from the Volunteer Records, Main Menu, select the submenu No Work Start Date. All Longevity reports may be limited by Volunteer Type or Status, and also by Work Start Date Range (except 5 Year Grouping).

»Volunteer Records	LONGEVITY REPORTING	
»Work Data	Longevity Reports are based on (Work) Start Date, which all volunteers should have. To check, go to Volunteer Record and select Reports.	
»Medical Tests	1. Select Printout	
»Training Programs	<input type="checkbox"/> Volunteer List	<input type="button" value="Edit Letter"/>
»Scheduling	<input type="checkbox"/> 5 Years In Service List (Date Range not used)	
»Awards	<input type="checkbox"/> Standard Mailing Labels	
»General Reports	<input type="checkbox"/> Labels with dates/Phone Numbers	
Inactivity/Activity	<input type="checkbox"/> Folder Labels (30/page, 2 col)	
Longevity	<input type="checkbox"/> Export to Excel Format	
Monthly Calculations	2. Select Limitations (optional)	
Monthly Reports	Volunteer Type	Volunteer Status
Year End Reports	<input type="checkbox"/> Adult	<input type="checkbox"/> Active
Year to Year Comparisons	<input type="checkbox"/> Aux Member	<input type="checkbox"/> Inactive
Volunteer Statistics	<input type="checkbox"/> Community Service	<input type="checkbox"/> OnLeave
»Setup and Utilities	<input type="checkbox"/> Junior	<input type="checkbox"/> Pending
»Sign In Utilities	<input type="checkbox"/> RSVP	<input type="checkbox"/> Resigned
»Applicant Tracking	<input type="checkbox"/> Student	
Logout	3. Order of Presentation	
	<input checked="" type="radio"/> Alphabetical	
	<input type="radio"/> Start Date	
	4. Select Inclusive Start Dates	
	<input type="checkbox"/> (Date Range Required for Letters)	
	Beginning Date	<input type="text" value="01/18/2011"/>
	Ending Date	<input type="text" value="01/18/2011"/>
	5. Labels - enter the number of Blank Labels on the first sheet	
	<input type="text" value="0"/>	Use only 30 labels per sheet; labels are generated from the top of the column down, not across.
	There MUST be more than one record being requested.	
	<input type="button" value="Print"/>	

This system serves several purposes:

1. **Years in Service** – The list figures the number of years of service for each volunteer. Since only a very few hospitals give awards based on years of service, VoltrakWeb does not track awards in this area, without special modification.
2. **Mail merge export** – There is no VoltrakWeb automatic merge letter available, but this feature allows you to communicate with, e.g., volunteers that have begun work in the previous 2 weeks. Many of our hospitals use this to send a letter to all incoming volunteers. Labels are also available.
3. **‘Rolodex’ labels** – The second label available has name, address, phone #, work start date, and birth date, which can be used for a folder label or ‘rolodex’ card. This feature is under Longevity so that labels on just recently added volunteers may be printed.
4. **Folder Labels** – This label has only the volunteer name and number and uses a different size label, 30 per page, 2 columns.

Monthly Reporting System

This feature provides for the automatic reduction of daily-posted work hours to usable summaries by Volunteer Type and Work Areas. One of the most time consuming tasks is to manually calculate the total of each volunteer's hours for the month; even more time consuming is to manually determine who worked in each Work Area, the hours for each volunteer, and the total hours for that Work Area. In fact, the latter is so time consuming, many departments don't even provide that information. VoltrakWeb does this totally automatically.

Hours for the month are summarized and kept in special summary tables. These tables become the basis for all Month, Year End and Year to Year comparison reports.

Monthly Calculations

In order to provide Monthly (Year End and Year to Year) reports, each month's posted work hours must be summarized (calculated). This also permits the deleting (and archiving) of posted work hours to keep that table small and more easily edited. Calculations should be performed when all the hour data for that month has been entered. It is not necessary to refrain from entering work data for subsequent months until the desired month is calculated.

The calculation routine places information in three separate summary tables: one for totals by Work Area, the second for totals by Volunteer Type, and a third that carries the names, hours, and work areas of all volunteers working in a given month. The latter table permits volunteers that are no longer volunteering to be deleted (or archived) without losing data for year end reports. Months may also be re-calculated in the instance that data were inadvertently not posted.

DO NOT re-calculate a month in which volunteers or work data have been deleted or archived.

To perform the monthly calculation:

1. Post all work hours for a given month
2. Request Monthly Calculations (Main Menu, General Reports)

That's it, VoltrakWeb does the rest.

Monthly Reports

There are a variety of Monthly Reports from a summary page to individual Memos to each Work Area listing the names and hours of volunteers. Since all VoltrakWeb's reports may be viewed first, the best way to see what each report gives you is to calculate a month and view all the reports.

The reports for the work areas with the volunteers' names require the special summary table mentioned above. Generally these data are not archived, but there is an archive feature available.

» Volunteer Records

» Work Data

» Medical Tests

» Training Programs

» Scheduling

» Awards

» General Reports

Inactivity/Activity

Longevity

Monthly Calculations

Monthly Reports

Year End Reports

Year to Year Comparisons

Volunteer Statistics

» Setup and Utilities

» Sign In Utilities

» Applicant Tracking

Logout

MONTHLY REPORTS

1. Monthly Report(s) for:

Month
December
Year
2010

2. Select Report(s)

☐ Summary Page
☐ Work Areas, Hours by Volunteer Types
☐ Work Areas, with Volunteer Names
☐ Memo to Work Areas

+

-

☐ Volunteer List

Limit to type
(none)

☐ Inactive Work Areas

Print

Work area reports with volunteer names may be requested as a continuous report or separated as a memo. The memo option allows the selection of the work areas. **Note that this is a different selection** process. Only those selected will be used, as opposed to most of VoltrakWeb filters wherein if a filter is not selected, all available are used. If all work areas are to be selected, after selecting the option and then clicking on the ‘+’ add button, click on the first work area (highlighting) then scroll down to the last and Shift-Click on the last. This should highlight all areas. Individual areas may be selected by Ctrl-Clicking on the selection.

Year End Reporting System


This reporting system is essentially the same as the Monthly Reporting System. VoltrakWeb does not distinguish between calendar and fiscal years, but uses the 12 months starting with the Month and Year that are entered on the Print Request screen. If not all 12 months are available, the totals will be for available months, and each report will indicate how many months were available for the report. To get year to date reports, use Year End reports after all months have been calculated for the quarter(s) desired. There is an additional Year End report listing work area totals by Month, in addition to Volunteer Type.

YEAR END REPORTS

1. Year-end Report(s) for:

Beginning Month 
Beginning Year

2. Select Report(s)

- ☐ Summary Page
- ☐ Work Areas, Hours by Volunteer Types
- ☐ WorkAreas, Hours by Month
- ☐ Work Areas, with Volunteer Names
- ☐ Memo to Work Areas
- ☐ Volunteer List Limit to type 
- ☐ Inactive Work Areas

Resetting Year to Date Hours

This is a special feature to replace all Year to Date hours in the volunteers' records with zero. Since this is only a field value (no dates) it must be done either on a calendar basis or fiscal basis, regardless if Year End reports are generated for a fiscal year. This Year to Date hour total only appears in the Volunteer Record and on the Volunteer Accumulated Hour Report, and not in any of the Year End Reports. Therefore, it is often easier for volunteers viewing the Accumulated Hour Report if it is based on a calendar year.

Resetting Year to Date hours should be done soon after all hours for the previous year have been entered. It is not necessary to refrain from posting hours in the new year, VoltrakWeb will only use the date range of hours that has been selected. For example, if year to date hours are to be set back to zero for the year beginning Jan 2011, a Jan 2010 year end report should be selected for the reset. VoltrakWeb will set the year to date hours to zero as of Dec 31, 2010, then calculate and add any hours posted on or after Jan 2, 2011.

Year to Year Reporting System

There are two reports available in this Print Request (General Reports, Year to Year comparisons).

1. Monthly Totals – This report produces a report of monthly totals for each year in the system.
2. Work Area Totals – This report is for a maximum of 10 running years, listing the Work Areas and their total hours for each of the years requested (and available).

Both reports are requested from a beginning month and year so that calendar or fiscal reports are available.

Volunteer Statistics

This report counts volunteers by Volunteer Type and Volunteer Status. Additionally, an age grouping is performed for those volunteers that have a birth year in the system. Age groups are under 20, 20-29, 30-39, 40-49, 50-59, 60-69 and over 70.

Setup and Utilities

Setup and Utilities provides a number of routines from initial setup to ongoing operational routines. There are certain options that are made available only to the Master Password, which must be used on the Login entry.

Also, see the section on 'Getting Started' for additional information on some of these options.

Code File Entry and Deletion

Code Files are used to track:

- Work Areas
- Volunteer Types
- Volunteer Status
- Medical Tests
- Training Programs
- Skills
- Referral Sources
- Languages

Each table carries a code number ('CC') and a description ('DP'). VoltrakWeb tracks this information in various related data tables by number, not description; what is presented on the screen for the user is the description. The Code File Entry screen provides access to these files for adding, changing and deleting items from these files.

Descriptions may be edited without changing the tracking of an item. For example, E.R. can be changed to Emergency Room without affecting any of the related tracking systems.

Adding a new entry into a Code file:

1. If there is any question whether an entry is already present, it is advisable to preview (Print) the list of entered items first; removing duplicate entries can seriously and adversely affect tracking systems.
2. Select the code file from the radio button selections.
3. Set the Printing Options to Order by Number.
4. Since a unique number must be entered, click on 'All' at the bottom of the grid to ascertain the next available number by scrolling to the bottom of the list.
5. Click on Add and enter both the number and description of the entry.
6. The new entry will now be available on all related screen displays.

All Code files will accept 9,999 entries except Volunteer Types is limited to 10 (1-10) and Work Areas to 5000 (5000-9999).

Work Areas are used for tracking volunteer hours and assignments, and for summarizing hours by work area in the Monthly, Year End and Year to Year reports.

There are specific code ranges for hospital versions from 5000 to 9999. These are detailed in VoltrakWeb Setup, above, and come up on the screen when the Work Area Code file entry is requested. They permit group summaries in the Monthly and Year End reports for Main Facility Work Areas (5000-8999) and Out of Facility Work Areas (9000-9999).

Archiving and Deleting

Databases, just as word processing, need to be cleaned up occasionally; removing records no longer being used makes applications run faster, and data searching and viewing easier. All VoltrakWeb archives are carried in the existing database, and all have retrieval options. All archives are backed up with the client database.

Archiving is provided for three areas in Voltrak:

Volunteer Archive

Work Data Archive

Month and Year end summary data that carry volunteer names

Select Volunteers to Archive

Volunteers may be archived ONLY under Setup and Utilities. An Add/Remove box is provided in which multiple volunteers may be selected for archiving. Use Ctrl-Click (or double click) on the name to select more than one volunteer.

NOTE: Archiving volunteers may also remove all work data and all related support data such as assigned work areas, skills, etc. These data, for the most part, become quickly outdated; should a volunteer be retrieved they would be of little value, and can be re-entered as easily as updated. It is recommended that all work data for any months in which the volunteers are going to be deleted, be first archived. [Currently this is not being done, but will be a distinct probability in the near future.]

Archiving volunteers is not a requirement in VoltrakWeb. Volunteers may also be deleted from the Volunteer Record. It is recommended that a volunteer profile be printed prior to performing volunteer deletion.

View/Retrieve Archived Volunteers

This submenu provides a standard volunteer search for volunteer selection, as well as a list print for all volunteer that have been archived.

When the volunteer is selected either with the name search and View, or by entering the volunteer number, the volunteer record is displayed with full edit option. Additionally, there are two buttons available, one to retrieve the volunteer and the other to print the volunteer's profile. A volunteer is retrieved with full demographic data, including last work date and work area, and career (accumulated) hours.

Note that additional filter routines are being considered for viewing (printing) archived volunteers, and will likely be based on their last work date. This will aid in the removal of unnecessary records.

Archive/Retrieve Daily Work

It is recommended that Posted Work Data older than two years be archived. Data are archived by Month/Year range, and can be retrieved at any time.

Because of the large number of records that these data can reach there are not only routines to Archive, but to View (print) and Delete.

VoltrakWeb, at this time, does not lease by capacity, but by the number of volunteers. However, hosting costs are based on database capacity. Should Work Data and/or volunteer photos (stored as jpeg) become larger than average for the same number of volunteers, a client may be asked to remove unnecessary data and/or use bmp formatting for volunteer photos. Other wise our lease fees are based on the number of volunteers, regardless of the capacity (size) of the database.

Retrieval of Work Data uses the same screen as Archiving, and is done by Month/Year range. Data retrieved that no longer has a corresponding volunteer record will show with a blank name on any work data or summary reports.

Note that any Monthly Calculations should not be performed on older retrieved work data. Since volunteers may also have been archived or deleted, recalculations may cause a significant reduction in some totals and volunteer listings.

Archive/Retrieve Year End Summay

Doing the monthly calculations creates the Summary Data used for Monthly, Year End and Year to Year reporting. One of the tables used for the summary data carries the volunteer names for a given month, and are used for Month/Year End volunteer lists and department lists with names. When reports with the volunteers' names are no longer required, these data can be archived. Data for the summary page, work area hour by type, and by month, and Year to Year comparisons are always available.

Retrieval is available for these data.

Purge Schedules

Scheduling purging removes all monthly schedules that have been built backward from the month that is entered. This should be done for two reasons:

1. To remove all built schedules no longer in use
2. To remove and then rebuild a current month's schedule where significant changes have been made in the Master Schedule. Note that purging will also remove any editing that has been done to that schedule (volunteers marked absent or deleted from the schedule for any dates). To preserve editing and add new volunteers, simply rebuild the schedule without first purging; this will only add information on volunteers that were not originally in that month's schedule, and will not change any data for volunteers already in the built schedule.

Set Award Levels

»Volunteer Records

»Work Data

»Medical Tests

»Training Programs

»Scheduling

»Awards

»General Reports

»Setup and Utilities

Code Files

Select Vol. to Archive

View/Retrieve Arc. Vol.

Arc./Ret. Daily Work

Arc./Ret. Yr. End Sum.

Purge Schedules

Set Award Levels

Set Label Size

User Passwords

Master Settings

Audit Log

Miscellaneous Defaults

»Sign In Utilities

»Applicant Tracking

SET AWARD LEVELS TO VOLUNTEER TYPE

Each Volunteer Type must have an associated Award Level Setup of A or B. See the Setup descriptions below.

	Volunteer Type	Award A or B
Edit	Adult	A
Edit	Aux Member	A
Edit	Community Service	A
Edit	Junior	B
Edit	RSVP	A
Edit	Student	B

Award Levels. The last level is an incremental level, increasing each award level after the ninth by that amount.

	A Levels	B Levels
First	<input type="text" value="100"/>	<input type="text" value="50"/>
Second	<input type="text" value="250"/>	<input type="text" value="100"/>
Third	<input type="text" value="500"/>	<input type="text" value="150"/>
Fourth	<input type="text" value="750"/>	<input type="text" value="200"/>
Fifth	<input type="text" value="1000"/>	<input type="text" value="250"/>
Sixth	<input type="text" value="1500"/>	<input type="text" value="300"/>
Seventh	<input type="text" value="2000"/>	<input type="text" value="350"/>
Eight	<input type="text" value="2500"/>	<input type="text" value="400"/>
Ninth	<input type="text" value="3000"/>	<input type="text" value="450"/>
Incremental	<input type="text" value="500"/>	<input type="text" value="50"/>

Cancel Changes

Save Changes

Set Award Levels to Vol Type

Award Levels must be entered AFTER Volunteer Types have been entered, and BEFORE an award calculation is performed. Two levels of awards are available and volunteer types are assigned to one of the two levels.

Every volunteer type **MUST** have an Award 'A' or Award 'B' assigned.

Every Level **MUST** be filled in for 'A Levels.' Every level **MUST** also be filled in for 'B Levels' if any volunteer type has been assigned a 'B.'

If a new volunteer type is entered into the code file, be sure that new type gets assigned an Award A or B.

Leaving any blanks will cause an error message in attempting to run Award Calculations.

Set Label Sizes

The defaults are already set for a 1"x2 5/8" labels, three columns, 30 labels per page (Avery number 5160). These defaults may be changed for other labels sizes. See Getting Started for label adjustments.

User Passwords

The **Master Password** allows full access to all features of VoltrakWeb, and should NOT be used unless these features need to be accessed.

User Passwords should be assigned to all users (staff); volunteers, unless acting in a staff capacity, do not get passwords. Certain Setup and Utility submenus are not available with user passwords. Each user password also has an email address and name entry that may be entered, but is not required. When a user logs into VoltrakWeb, this information, if available, is used as a return address when any email request is sent. If the user email data are not entered the default sender's name and email address will be used. (Note that this is not currently implemented, but will be by Fall 2011.)

Master Settings

With the Master Password, both the Master Password and default email settings can be changed.

Master Password – it is highly recommended that this only be changed if this password has been given to other users other than the administrator. Benan Systems also uses this password to gain access for support issues. Benan Systems should be advised of any Master Password change, although the password itself does not have to be sent.

Audit Log

VoltrakWeb has an Audit Log that tracks users by password, providing time in and out and indicating if critical data have been changed in the database.

This Audit Log can be enabled/disabled from this submenu as well. It is recommended that the Audit Log be enabled and checked periodically.

There is a routine to remove past records for this system.

Miscellaneous Defaults

Posting hours manually (Work Data or Volunteer Records) is either by entering Time In and Time Out, or by entering Bulk Hours. The normal default is by Time In, which can be changed to Bulk Hours on these screens. The option to temporarily change this entry is still available on screen.

Search routines to locate a volunteer's records may be set to search by Volunteer Number, Last name or First name. The Default Setting may be set here to always come up either as Volunteer Number or Volunteer Last name. It can always be temporary changed on the screen.

SignIn Utilities

SignIn Utilities permits access to the part of the database associated with the volunteer sign in.

Edit SignIn

If a volunteer signs in and fails to sign out on the same day, they are stopped from signing in again or out on a subsequent date. Their record may be edited under this submenu by either deleting the sign in record, or completing the record with the volunteer's sign out time.

View Daily Activity

Volunteers that have signed in for the current day's date are presented with their name, sign in time and work area. Volunteers that have already signed out for the day, or that have had hours manually posted for the current day, are listed in a second grid.

The active grid also has a print option particularly useful for an emergency list providing all volunteer names that are currently in the facility, the time they came and their work location.

The combination of both the active grid and the lower grid of those that have completed volunteering for the day provides information on whether the volunteer is currently working, or has worked for the day and has left.

Personal Message

All personal messages that have been posted to the sign in system and not read are listed. These include two from the Volunteer Record: the See Office which is an automatic notification, 'Before you sign in, please check with the office.', and the Personal Message that is entered by the user. A third group message is available under Volunteer Lists. Messages that have been read are automatically deleted.

Message alerts (medical tests and training programs due) are not actual messages that are posted, but only temporary messages displayed when a volunteer signs in.

Individual or all messages may be deleted from this submenu

General Message

A Volunteer 'bulletin board' is always associated with the volunteer sign in number pad, and can be viewed at any time.

This submenu provides a rich text memo field to change that message. Note that the size of the Message Center is not large and messages should be kept as short as possible to avoid the volunteers from scrolling down to view the entire message.

Applicant Tracking

VoltrakWeb has a complete tracking system for applicants so they don't become part of VoltrakWeb's volunteer database until they have been accepted. This system is designed to track their Application (date sent and date returned), Interview and Orientation (scheduled dates), all with automatic reminder letters. Additionally, Skills and desired Work Areas are also tracked for each applicant to assist in placement.

»Volunteer Records

»Work Data

»Medical Tests

»Training Programs

»Scheduling

»Awards

»General Reports

»Setup and Utilities

»Sign In Utilities

»Applicant Tracking

Applicant Tracking

Alphabetical Listing

Alpha Listing/Phone #'s

List, Work Areas/Skills

Reminder Letters/Labels

List, Letter Check

Logout

APPLICANT TRACKING

Add

Search by ☒ Last ☐ First ☐ Number

Search

	Title	First Name	Last Name	Nickname
View	Mr.	Jerry	Spanner	
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z ALL				

Letter
Interview Reminder
Orientation Reminder
Transfer to Volunteer

Letter Templates
Individual Profile

Save
Delete
Cancel

Applicant Record

Title

Nickname

Address*

City* State* Zip

Home Phone Work Phone (999-999-9999)

Vol Type

Date of Birth Gender ☒ Male ☐ Female

Application given Interview

Application returned Orientation

Reminder Letters Sent ☒ Application ☒ Interview ☐ Orientation

First Name* MI Surname*

Work Areas

Central Supply

Skills

Accounting
Computer Input

Memo

Paragraph Font Size Color

B I U abc x x

[Rich Text Editor Icons]

Reminder Letters - If letters are sent, VoltrakWeb keeps track that these letters have been sent so a request for a group printing for the same date range will not give duplicate mailings.

Reminder Letter Merge – VoltrakWeb performs the merge up to the end of the first paragraph. The remainder of the letter is written by the user (and saved). To write or change these letters, select Letter Templates on the applicant screen, then use the drop down box at the top of the rich text edit screen to select the letter to modify.

Email –Individual Email will be added by Fall 2011. Consideration is being given to also adding group email related to application, orientation and reminder due dates.

Transfer to the volunteer database is automatic with a click of the button ‘Transfer to Volunteer.’

Printing

There are two printing routines for the Applicant Tracking system: individual letters directly from the applicant screen on brown buttons and Group printing from submenu options under Applicant Tracking.

Individual Letters are available for Interview, Orientation and Letter, and are on the brown buttons of the applicant screen. Selection provides the automatically merged letter in a rich text screen (Letter is blank), which can then be edited in its entirety. Printing is directly to the local default printer by clicking on the printer icon.

Group printing has the following options available from the Applicant Tracking submenus:

- Alphabetical Listing
- Alphabetical Listing with phone #
- Alphabetical Listing with Skills and Work Areas
- Reminder Letters/Labels/Export – This provides a Print Request screen from which you may select a List, Letter, Export and Labels for Application return, Interview or Orientation, based on a date range.
- List, letter check – This report lists applicants with a True (sent) or False (not sent) for the three reminder letters.

Instructions for Using VoltrakWeb's Photo ID

Photos are best generated by a digital camera using a PC with the necessary software for downloading and editing. The photograph should be at reasonable close range capturing the shoulders, allowing a little latitude for editing. Generally the editing software that comes with the camera (e.g. HP Photo Smart with HP cameras) has cropping, image resizing and ability to save in a bmp format.

A directory needs to be created on the PC to hold the uploaded pictures; once uploaded to VoltrakWeb, they should be moved to a second 'inactive' photo directory. Note that VoltrakWeb's export functions do not export photos.

Photo images have different extensions (jpg, bmp etc.); VoltrakWeb uses both bmp and jpeg (jpg) formats, **although bmp are preferred for capacity reasons**. Also, created images are often automatically given a file name often consisting of 'IM' plus a number and extension, like IM000034.jpg. Identifying the picture you want is not easy unless it is either renamed, or the photos to be uploaded into VoltrakWeb are kept separate from those already uploaded.

In VoltrakWeb's loading procedure, pictures can be browsed to pick the right volunteer before the image is put on the volunteer's record.

To prepare and upload an image to VoltrakWeb:

1. Take the picture(s) and upload to into your PC; both an 'active' directory should be used with a subdirectory for photos having been uploaded to VoltrakWeb.
2. Use image editing software and, if necessary, crop and enhance the picture to create a square close-up image
3. Resize the picture to a 125 by 125 pixel image
4. Save this image in bmp format (preferred) or jpeg (jpg)
5. From the Volunteer's Record, click on the brown button 'Load Picture' to bring up the picture browse and upload screen
6. Browse to locate the correct photo
7. Click on Upload to load photo into VoltrakWeb

Volunteer SignIn Module

General

The screenshot displays the Volunteer SignIn Module interface. On the left, there are input fields for 'Volunteer Number' (42) and 'Work Area Number' (9000), with a 'Total Career Hours' field showing 1961. A 'Change Area' button is visible. The center features a numeric keypad (0-9) and 'Sign In' and 'Sign Out' buttons. On the right, a 'General Message Center' window is open, displaying a welcome message and a list of capabilities: 'see office' alert, personal message, and Med test and Training alerts 2 weeks prior to date.

General Message Center

Volunteers, welcome to your new message center!

Each time you sign in, check this center to see if there are general messages from the Volunteer Office.

This system will also have these message capabilities:

- 'see office' alert
- personal message
- Med test and Training alerts 2 weeks prior to date

The Volunteer SignIn Software provides a real time sign in and out system for volunteers. The system automatically records the time and date of the sign in and out and calculates the hours worked and automatically updates the volunteer's record.

A special password must be entered under Setup and Utilities, User Passwords, with Sign In rights. This may be a simple password and is used only to bring up the volunteer sign in number pad. This system is designed to remain up 24/7; volunteers will use only their volunteer ID number to sign in and out.

The volunteer sign in is designed to be used on a touch screen monitor, so only the monitor should be made available, hiding or locking up the PC, mouse and keyboard. If a touch screen is not available, only the mouse should be made available.

It is also recommended that this PC be dedicated to this function and all other options usually available to users be made unavailable. Only an internet connection is required.

New volunteers should be given their volunteer number (ID). If possible, prior to a new volunteer signing in, staff user should enter their beginning work area under the volunteer's record, Work Related tab in the field Last Work Area. This will then appear for them when they sign in.

Sign in Operating instructions

The steps a volunteer should follow are in the upper left corner of the SignIn Screen; these instructions ‘move’ as each step is executed. To assist volunteers that have not used the SignIn, we suggest that a portion of this manual be reproduced for them, and perhaps their ID number written on the back of their volunteer badge.

Additionally, one step that is often forgotten by volunteers just learning to sign in, is to sign out. It may help to put a large message on the Sign In’s bulletin board to ‘Please remember to Sign Out!’

These are the steps for a volunteer signing in:

1. Touch Sign In
2. Enter your ID number on the keypad (note there is a Name Search button)
3. Touch OK – your number and name will be displayed on the left, black on yellow
4. If the name is correct, and your work area is also displayed and is correct, touch Finish
5. If the name is incorrect, touch Cancel and try again or get assistance.
6. If the name is correct and the work area is missing enter the work area number on the keypad (note there is an Area Search button)
7. If the name is correct and the work area is not, click on Change Area to enter a new work area (number or use Area Search)
8. If both name and work area are now entered, touch Finish.
9. DO NOT close the sign in screen

Signing out only requires the volunteer number and verification that the correct number was entered

1. Touch Sign Out
2. Enter volunteer ID and touch OK
3. Touch finish if name is correct.

For most volunteers that volunteer in one work area and have that work area in their record, they need only to:

1. Touch Sign in
2. Enter their ID number and Touch OK
3. Verify the name and area displayed
4. Touch Finish (assuming data are correct)

If a volunteer has already signed in, or has failed to sign out for a previous date, a message will appear and the sign in procedure cancelled.

As soon as OK is touched, Personal messages, alerts to see the office or notification of an upcoming Medical Test or Training Program are presented to the volunteer.

Set Status to All

Volunteer status is used to limit the volunteers that are able to sign in. The default setting is set to allow only volunteers on Active Status to sign in. By clicking on this option, the limitation is lifted and all volunteers may then sign in. (See Setup and Utilities, Miscellaneous Defaults.)

Note that the code for ‘Active’ status that is used is 1. Please check to make sure that VoltrakWeb’s active status code is 1. (Setup and Utilities, Code Files, Volunteer Status). If it is not ‘1’ this option should not be used and should be set to all; the utility line should read ‘Set Status to Active.’

Manual Updates and Printing

The manual is presented as a PDF download and can be viewed, printed and/or saved locally so it is available at any time.

There is a revision date on the cover page that should be noted. VoltrakWeb Software will most likely always be in a state of updating with changes and new additions. The manual will be adjusted as these application updates are implemented, and the revision date changed. Generally, a notification will be sent to all clients advising of major changes and additions.

Suggestions for using the manual:

1. Clicking on Manual, Main Menu will bring up the PDF preview of the manual.
2. Print sections by page number, or print the entire manual
3. Save the manual for desktop use
 - Use the icon to save the manual to a known location (directory)
 - Once saved, right click on the VoltakWebManual.pdf file and select 'new' and then 'create shortcut'
 - Drop and drag the new shortcut to the PC desktop; the manual will then be available without having to log into VoltrakWeb

Contact Information

Note that there may be additions to our contact information periodically. Our email list, particularly, will change as we begin to separate certain areas of our support, such as Info, TechSupport, Training, Accounting, etc., and provide direct emails for to areas.

Benan Systems LLC
11445 E. Via Linda Ste 2 #475
Scottsdale AZ 85259
800 865 8725

www.voltrak.net

Voltak@msn.com

Info@Voltrak.net

Tech support

Training support

Accounting

Main company email address

Currently a company contact, but will soon be used primarily for prospective clients
possible addition

possible addition

possible addition

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