Oregon Episcopal School

VolunteerSpot Organizer Cheat Sheet

2013-2014
All organizer tasks require you to log on to VolunteerSpot (www.volunteerspot.com) using your organizer email and password

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| 1. Register for VolunteerSpot account | 1. Go to [www.volunteerspot.com](http://www.volunteerspot.com)  
2. Click on the word “Register” in the upper left of the screen  
3. From the “I would like to” drop down box, select “Register Organizer Account (Assistant Organizers too!)”  
   a. Fill in the rest of the boxes, click Next  
   b. Choose a password and type it in twice  
   c. For the Organization type choose Booster Club/PTA, click Next  
   d. Promotion code should be blank  
   e. You may want to uncheck “I want to receive special offers and promotions …”  
   f. You must check “I agree to VolunteerSpot Terms of Service”  
   g. Click Register  
4. VolunteerSpot will send you an email with a link that you must click to activate your account. |
| 2. Accessing a locked activity | 1. If the activity you would like to access is locked (a padlock in the right margin of your MyActivities list), click on the activity  
2. A message will pop up telling you who has the activity locked and for how long  
3. If the activity has been locked for more than 2 hours, you may unlock the activity  
*Exception if a room parent has the activity locked during the 1st 3 weeks of school please DO NOT unlock the activity without contacting the room parent.* |
| 3. Add a task to a day without any tasks | 4. Click on the MyActivities menu tab  
5. Select the activity to edit  
6. Click on the date where you want to add the task  
7. Select “Plan this Day”  
8. Select “Add a To Do Task”  
9. Give the task a name  
10. Select how many people you need  
11. Specify the time for the task  
12. Describe what the task entails  
13. Click Save  
14. Repeat steps 5 to 10 to add more tasks to the day  
15. Click Save  
16. Plan additional days  
17. When done with all changes to the activity click Close & Unlock to exit the activity |
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| 4. Add a task to a day with existing tasks | 1. Click on the MyActivities menu tab  
2. Select the activity to edit  
3. Click on the date where you want to add the task  
4. Select “Make Changes”  
5. Select “Add a To Do Task”  
6. Give the task a name  
7. Select how many people you need  
8. Specify the time for the task  
9. Describe what the task entails  
10. Click Save  
11. When done with all changes to the activity click Close & Unlock to exit the activity |

5. Add an activity | Contact the All School Volunteer Coordinator at oesvolunteer@oes.edu  
We ask that other organizers not add activities to ensure that we have premium features (such as the ability to add organizers) on all our activities and following a consistent naming convention. Only a premium user can create activities with access to premium. |

6. Copy a day to a new day in the same activity | 1. Click on the MyActivities menu tab  
2. Select the activity to edit  
3. Click on the date you want to copy  
4. Select “Copy”  
5. On the calendar that pops up, click on the date or dates to copy to (if you clicked on a date in error, click on the date again to unselect). You may also click on the square boxes above the calendar to select that day of the week in each week (for instance all Wednesdays) or the square box to the left to select all days in that week.  
6. Make sure the Copy To box says “This Activity”  
7. Click on Copy  
8. When done with all changes to the activity click Close & Unlock to exit the activity  
Caution – if tasks already exist on the date you are copying to, you will overwrite everything on that date.
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| 7. Copy a day from one activity to another   | 1. Click on the MyActivities menu tab  
2. Select the activity that has the day you want to copy to another (you need to be an organizer on both activities)  
3. Click on the date you want to copy  
4. Select “Copy”  
5. On the calendar that pops up, click on the date or dates to copy to (if you clicked on a date in error, click on the date again to unselect). You may also click on the square boxes above the calendar to select that day of the week in each week (for instance all Wednesdays) or the square box to the left to select all days in that week  
6. In the Copy To box select the activity where you want to copy this day  
7. Click on Copy  
8. When done with all changes to the activity click Close & Unlock to exit the activity   |
|                                             | *Caution – if tasks already exists on the date you are copying to, you will overwrite everything on that date.*                                                                                                                    |
| 8. Delete a task                             | 1. Click on the MyActivities menu tab  
2. Select the activity  
3. Click on the day with the task you wish to remove  
4. Select “Make Changes”  
5. Click on the red x to the right of the task you wish to remove  
6. Click OK when asked if you are sure you want to delete  
7. Click Save  

*Everyone signed up for this task on this day, will be notified by VolunteerSpot that the task has been deleted.  
If this is the only task on this day the whole day will be deleted. Click OK when prompted to remove the entire day.*  
8. To replicate this change to other days, see “Copy a day to a new day in the same activity”  
9. When done with all changes to the activity click Close & Unlock to exit the activity  

| 9. Delete a day                              | 1. Click on the MyActivities menu tab  
2. Select the activity  
3. Click on the day you wish to delete  
4. Select “Delete”  
5. Click ok if you really want to remove that day  

*Everyone signed up for this tasks on this day, will be notified by VolunteerSpot that the tasks have been deleted.*  

| 10. Delete an activity                       | **DON’T!!!**  
Please contact the All School Volunteer Coordinator at oesvolunteer@oes.edu if you think you need an activity deleted.  
• If you are the primary organizer, clicking the red x to the right of the activity in MyActivities list will delete it. Please don’t click on this X  
• If you accidentally delete an activity contact the All School Volunteer Coordinator  

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| 11. Change/Edit a day for date based activities | 1. Click on the MyActivities menu tab  
2. Select the activity to edit  
3. Click on the date you want to change or edit  
4. Select “Make Changes”  
5. Click on the Edit button to the right of the task you wish to change  
6. Make your changes to one or more of the elements that define the task (name, number of people, start/stop times, description)  
7. Click Save  
3. Change any other tasks that need changing  
4. When done with changes to all tasks that need to be changed, click Save  
5. When done with all changes to the activity click Close & Unlock to exit the activity |
| 12. Change/Edit a non-date-based activities (projects) | 1. Click on the MyActivities menu tab  
2. Select the activity to edit  
3. Click on Edit Spots  
4. To add a task  
   a. Select “Add a To Do Task”  
   b. Give the task a name  
   c. Specify the time for the task (if there is one)  
   d. Describe what the task entails  
   e. Click Save  
5. To delete a task  
   a. Click on the red x to the right of the task you wish to remove  
   b. Click OK when asked if you are sure you want to delete.  
6. Click Save  
7. Click Close & Unlock to exit the activity |
| 13. Move an entire day | VolunteerSpot does not have a move feature.  
1. You will need to follow the instructions for “Copy a day to a new day in the same activity” (task #5)  
2. Then follow the instructions for deleting a day (task #8) |
| 14. Move a task from one day to another | Individual tasks cannot be moved.  
1. If tasks already exist on the day you want to move to, follow the instructions to Change/Edit a day (task #10)  
2. If no tasks exist you may plan the new following the instruction in “Add a task to a day without any tasks” (task #2)  
3. Then follow the instructions to delete a task (task #7) |
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| 15. Change Welcome Message, Location, or Activity Name | 1. Open the activity through MyActivities  
2. Click on the green Details tab  
3. Click Make Changes  
4. Click in the appropriate box to edit or add text, there are character limits for each field and VolunteerSpot will tell you when you have reached those limits  
5. Click Save  
6. Click Close & Unlock to exit the activity  | **Changes will not take effect until the activity is closed using the Close & Unlock button.** |
| 16. Create a URL for sign-ups | 1. Open the activity through MyActivities  
2. Click on the Create a Link option in the menu on the left  
3. A large box will pop up with several options  
   a. Click in the box in the green banner – this will highlight the URL. Press ctrl/control and C simultaneously on your keyboard  
   b. Move to the document where you want to place the link. Paste the URL into that document  
   c. Alternatively you can create a hyperlink (where you don’t see the URL, but can access it by clicking on a word or phrase – usually underlined blue text). See the instructions for creating a hyperlink in task # 16  
4. Click Close & Unlock to exit the activity | |
| 17. Create a URL hyperlink | A hyperlink is where the URL is not visible, but can be accessed by clicking on some text. The “live” text is usually blue and underlined. If a document is created in plain text a hyperlink will not be possible (no other formatting, such as colored text or bolding, will work either). If your document will support hyperlinks,  
1. Copy the URL per the instructions in “Create a URL for sign-ups”  
2. Highlight the words you want the user to click on to be taken to your URL  
3. From the menu of the message you are creating select Insert  
4. Select Hyperlink  
5. Place your cursor in the Address box and press ctrl and V simultaneously to paste the URL in this box  
6. Make sure “Existing File or Web Page” is highlighted on the left side  
7. Click OK  
8. The text should become underlined and blue | These instructions are for Microsoft Outlook, other software may have slightly different terminology and/or process |
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<tbody>
<tr>
<td>18. Checking status of tasks (includes Report and Export functions)</td>
<td>There are 4 ways to do this:</td>
</tr>
<tr>
<td></td>
<td>1. Go into the each day and look</td>
</tr>
<tr>
<td></td>
<td>a. Open the activity through MyActivities</td>
</tr>
<tr>
<td></td>
<td>b. Click on the day to view</td>
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<tr>
<td></td>
<td>c. Select “View Status” this shows all tasks on that day, who has signed up, and how many of the desired spots are filled</td>
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<tr>
<td></td>
<td>d. You may print this (see #2 in this section – task #18), or close without printing.</td>
</tr>
<tr>
<td></td>
<td>2. Create a report using the Report option</td>
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<tr>
<td></td>
<td>a. Open the activity through MyActivities</td>
</tr>
<tr>
<td></td>
<td>b. Click on the Reports option in the menu on the left</td>
</tr>
<tr>
<td></td>
<td>c. Click on Day or Month</td>
</tr>
<tr>
<td></td>
<td>d. In the dialogue box to the right of your selection select the specific day to report (if you selected the Day option) or the specific month to report (if you selected the Month option)</td>
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<tr>
<td></td>
<td>e. Click on View &amp; Print</td>
</tr>
<tr>
<td></td>
<td>f. This opens a new browser window</td>
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<tr>
<td></td>
<td>g. To print, use your browser print commands</td>
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<tr>
<td></td>
<td>h. To copy all or part of the report into another document, highlight the text you would like to copy, press the ctrl/control key and C simultaneously, move to the new document and press ctrl/control V</td>
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<tr>
<td></td>
<td>i. Close the browser window containing the report</td>
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<td></td>
<td>j. Click Close on the report selection box</td>
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<td></td>
<td>3. Weekly emails from VolunteerSpot with a preview of the upcoming week</td>
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<td></td>
<td>a. Each Friday VolunteerSpot sends an email with a preview of the coming week (if there is nothing scheduled, no preview is sent)</td>
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<tr>
<td></td>
<td>b. This email is sent to all organizers on the activity and shows tasks for the week, what is filled and not filled and who is signed up</td>
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<tr>
<td></td>
<td>c. This email is automatically sent and does not require any action from organizers</td>
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<td></td>
<td>4. Export the activity to Excel</td>
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<tr>
<td></td>
<td>a. Export downloads all the tasks for all dates in the activity to an Excel readable file (the file has a .csv file extension rather than an .xls or .xlsx)</td>
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<tr>
<td></td>
<td>b. Open the activity through MyActivities</td>
</tr>
<tr>
<td></td>
<td>c. Click on the Export option in the menu on the left</td>
</tr>
<tr>
<td></td>
<td>d. Answer the prompt asking whether to Open or Save</td>
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<tr>
<td></td>
<td>e. If you choose to Save, the file will be in your default folder for downloads. When you go into Excel to review move to that folder and make sure file type says “All Files”. The file will have the same name as the activity with a .csv extension</td>
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If you used options 1,2 or 4, Click Close & Unlock to exit the activity
**Task # / Name** | **Step-by-Step Instructions**  
---|---  
19. Add Volunteers that have not signed up themselves | 1. Open the activity through MyActivities  
2. Click on the date you wish to assign the volunteer  
3. Select “Make Changes”  
4. Click on the Assignments button to the right of the task and below the edit button where the volunteer will be helping  
5. Click in the box that says “Click Here to Add a Volunteer”  
6. If the person’s name is listed, click on their name  
7. If it is not listed  
   a. Click on “New Volunteer”; in the box that pops up type their name and email. The phone number is optional  
   b. Click Save  
8. You may add as many volunteers as there are slots to fill  
9. Click Save when finished  
10. This returns you to the task list, you may continue to add volunteers to other tasks  
11. Click Save when you are done adding volunteers  
12. Click Close & Unlock to exit the activity  

20. Inviting people to sign-up using VolunteerSpot | There may be situations where you want to use VolunteerSpot invitation feature to invite people to sign-up rather than a URL. This would be used in a case where only some people qualify because of training or certification requirements.  
1. Open the activity through MyActivities  
2. Click on the Invite option in the menu on the left  
3. Enter email addresses in the To: box. Follow the VolunteerSpot instructions to the right of the To box for proper formatting. If you would like to send invitations to prior year volunteers contact oesvolunteer@oes.edu for a list of the names & emails  
4. Compose your message to volunteers. Note the message can’t exceed 1024 characters (this is letters and spaces and includes everything in the Message box). VolunteerSpot does not tell you when you have exceeded the limit. If you think you might be close or have gone over copy (highlight and press ctrl C) and paste (ctrl V) the text into http://charactercounttool.com/, an on-line tool that will count the characters for you.  
5. Click Send Invitations  
6. Click OK on the pop up that says Your invitations will be sent out shortly  
7. Click Close & Unlock to exit the activity
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| 21. Send a Message or Thank You using VolunteerSpot | You can send a message to all or some of the volunteers for your activity. Thank Yous have their own menu option, but are just a specialized message. The steps are the same.  
   1. Open the activity through MyActivities  
   2. Click on the Message (or Send a Thank You) option in the menu on the left  
   3. Click on Select Recipients  
   4. A box pops up that allows you to select recipients by Status, by date, or individually.  
      a. The list will include any one that was invited using a VolunteerSpot invitation, anyone who has ever visited whether they have signed up or not, and those that were signed by the organizer, even if they subsequently cancelled.  
      b. Status includes  
         i. Viewed - those that visited the activity but did not sign-up  
         ii. Not viewed – those that were invited by VolunteerSpot invitation, have not visited the activity  
         iii. Signed-up – those that signed-up for one or more tasks  
         iv. Declined – those that were invited with a VolunteerSpot invitation and clicked on the response “No Thanks”  
   5. Click on Save List  
   6. Compose your message to volunteers. Note the message can’t exceed 1024 characters (this is letters and spaces and includes everything in the Message box). VolunteerSpot does not tell you when you have exceeded the limit. If you think you might be close or have gone over copy (highlight and press ctrl C) and paste (ctrl V) the text into http://charactercounttool.com/, an on-line tool that will count the characters for you.  
   7. Click Send Message  
   8. Click OK on the pop up that says Your message will be sent out shortly  
   9. Click Close & Unlock to exit the activity |
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<td>22. Change organizer information</td>
<td>1. Open the activity through MyActivities&lt;br&gt; 2. Click on the green Organizer tab&lt;br&gt; 3. Click on the organizer’s name&lt;br&gt; 4. Enter the new information in the fields provided (the email address can’t be changed here, see instructions for Organizer Email Change)&lt;br&gt; 5. Click Save&lt;br&gt; 6. Click Close &amp; Unlock to exit the activity&lt;br&gt; <em>The change will not take effect until the activity is closed using the Close &amp; Unlock button.</em></td>
</tr>
<tr>
<td>(name, title, phone number)</td>
<td></td>
</tr>
<tr>
<td>23. Add Organizers</td>
<td>Contact the All School Volunteer Coordinator at <a href="mailto:oesvolunteer@oes.edu">oesvolunteer@oes.edu</a> with the organizer’s name and email. Organizers can only be added by a premium user. Organizers must be registered with VolunteerSpot (i.e. have a VolunteerSpot log-on) before they can be added.</td>
</tr>
<tr>
<td>24. Change Primary Organizer</td>
<td>You will need to be a premium user to do this. Contact <a href="mailto:oesvolunteer@oes.edu">oesvolunteer@oes.edu</a> for the promotion code needed to upgrade. 1. Log on to VolunteerSpot&lt;br&gt; 2. Temporarily upgrade your account to premium (upgrade lasts 5 days).&lt;br&gt; a. Click on MyInfo in the orange menu bar&lt;br&gt; b. Click on Upgrade in the left menu&lt;br&gt; c. Enter the code provided by <a href="mailto:oesvolunteer@oes.edu">oesvolunteer@oes.edu</a> in the promotion code box at the bottom of the page&lt;br&gt; d. Click Register for Premium&lt;br&gt; 3. Click on the MyActivities orange menu tab&lt;br&gt; 4. Open the activity that needs to be changed&lt;br&gt; 5. Click on the green Organizer tab&lt;br&gt; 6. Click in the box that says “Change Primary Organizer”&lt;br&gt; 7. Select the new primary organizer (they must already be an assistant)&lt;br&gt; 8. Click Ok when asked if you are sure you want to change Primary Organizer&lt;br&gt; 9. Click Close &amp; Unlock to exit the activity</td>
</tr>
<tr>
<td>25. Organizer Email Change</td>
<td>How you change your Organizer email address depends on what kind of change you need - an activity-specific Primary Organizer Change or a Universal Email Change. 1. <strong>Primary Organizer Change</strong>&lt;br&gt; To change the Primary Organizer of any activity to a new person or to yourself at a new email address but KEEP your current email address active in VolunteerSpot see the instructions for Change Primary Organizer (task #23)&lt;br&gt; 2. <strong>Universal Email Change</strong>&lt;br&gt; To replace your current email address with a new email address check VolunteerSpot’s Help option for the latest instructions&lt;br&gt; a. Click Help in the blue menu bar (to the left of the Log-in)&lt;br&gt; b. Type “change email” in the search box&lt;br&gt; c. Select the option that most closely matches what you want to do and follow the instructions</td>
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| 26. Volunteer Email Change | Volunteers should contact the Activity Organizer/room parent and request a change. To change a volunteer email:  
   1. Open the activity through MyActivities  
   2. Click on the green Volunteers tab  
   3. Click on the volunteer’s name  
   4. Enter the new information in the fields provided  
   5. Click Save  
   6. Click Close & Unlock to exit the activity |
|                        | If volunteers are involved in multiple activities or prefer not to contact each activity organizer, VolunteerSpot can make the change to the email address in all activities (Universal Email Change). Check VolunteerSpot’s Help option for the latest instructions:  
   a. Click Help in the blue menu bar (to the left of the Log-in)  
   b. Type ‘change email’ in the search box  
   c. Select the option that most closely matches what you want to do and follow the instructions |
