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Office of Volunteer Relations
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Updated January 19, 2017
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User Levels

There are four user levels within VolunteerMatch.

The basic account is a volunteer account. Volunteers can track their own hours, sign up for projects, propose projects for approval, manage their profile and set up opportunity alerts.

Project Leaders manage individual projects. You may choose one of two levels of Project Leader roles – project admin or project leader.

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<thead>
<tr>
<th>Action</th>
<th>Leader</th>
<th>Admin</th>
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<tr>
<td>Add Participants</td>
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<tr>
<td>Edit Status</td>
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<td>Send Emails</td>
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<td>Run Reports</td>
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<td>Track Hours</td>
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Special Event Administrators are added to individual campaigns. Under that Special Event Campaign (e.g. “Alumni Association” or “College of Engineering”) an SEM admin can post and manage projects, manage participants, track hours for participants and run signup reports for their campaign. Any Full Site Administrator or SEM admin can add a new SEM admin to a campaign.

The highest admin level is the Full Site Administrator, who can manage events, create new campaigns, run reports, feature nonprofits, customize the homepage and send system-wide emails. The Office of Volunteer Relations serves as the Full Site Admin.
Volunteer Experience: Logging into Your Account

To create or log into your account, select “login” in the upper right-hand corner of your site. If you have an account, use your ID and password to log in.

You may search for opportunities without logging in. If you find an opportunity you would like to volunteer for you will be prompted to sign in when you click the “sign up” button. All logins are managed through the Ohio State University Alumni Association’s website. YOU DO NOT NEED TO BE AN ALUMNUS TO SIGN IN! If it is your first time logging in you will be prompted to search the system to see if you have an existing account with the university. If one is not found, you can create one immediately. After logging in you will be returned to the Ohio State VolunteerMatch website.

Volunteer Experience: Tour of Your Homepage

Welcome to your volunteering homepage. This is where you’ll find all the tools you need to get involved with the volunteering program at Ohio State.

Your Activities Tab

The Your Activities tab will display information based on your personal volunteer activity on the site. This tab contains a section of Action Item buttons, a Personal Hours Tracking Gauge, and a Your Volunteering Table.

Track Hours Button

This button is a quick way for you to track hours. When you select the button, you will see a pop up where you can select either an existing activity that you have either signed up or tracked hours for or enter a brand new activity that is not in the system.
Select Existing Activity
When you select an existing activity and click continue, you are presented with a second modal that allows you to enter a date, total number of hours volunteered, and answer any necessary hour tracking questions.

Add New Activity
When you select ADD NEW ACTIVITY, you will be directed to search for an Ohio State department. Enter the department name and location. If you find the department you worked with, select the organization by clicking “Track Hours”. Then, enter the opportunity and volunteering information and click “Save”. Still can’t find the organization? You can still track your hours! Click on the link at the bottom of the search results to manually input the organization’s information and track your hours.

Upon returning to the home page after tracking hours you will see a message in green confirming the hours have been tracked. The Activities Table will also update and display the activity and hours that were entered.

Suggest Button
Opportunity Builder allows you to suggest volunteer opportunities. Once approved by a program administrator, volunteers will be able to sign up to participate in your suggested activity.

Click on the "suggest" button. To suggest a project, click on "Suggest a new Opportunity" Give your opportunity a title and click “Select a Campaign” and, select the department page in which you would like your opportunity posted. If you do not see the department listed, contact the administrator for that department (found on the information section of the departmental microsite).
Fill out the remainder of the form including the description, location, date and time for the activity. You can also add in "comments" that will be visible just to the program administrator as they review your project.
To complete your entry, click ‘Save.’ Click ‘Edit’ to review your listing. Your proposal will now be reviewed by a program administrator.

Once you've proposed a project, you can click on "Suggest" to view the status of your listing. In the ‘Status’ column you'll see whether your listing has been approved, rejected or is still waiting for approval. If your listing has been rejected, you can click ‘Edit’ to modify your suggestion and resubmit it. You can also edit listings that have not yet been reviewed.

**Alerts Button**

This button will direct you to the alerts page where you can customize an email to be sent to you on a daily, weekly or monthly basis that displays opportunities based on your interests and location.

**Search Button**

This button will direct you to the search results page displaying available volunteering opportunities for your location. You can select filters to narrow your results.

**Personal Hours Tracking Gauge**

This gauge will display an hour goal and each time you track hours it will update your progress towards this goal. Clicking “Create” will display a modal that will allow you to edit a title, select a time period and a total number of hours. You can always update this goal by selecting “edit gauge” beneath the thermometer.
Your Volunteering Table
This table is displayed beneath the action item buttons and shows which opportunities you have signed up for, or tracked hours towards. The table displays the activity name, the organization or special event, the dates associated with that activity, and action icons that allow you to quickly take specific actions on that opportunity. There is also an option to add a new activity. When you track or edit hours, a message will display above the table in green confirming the success of the action.

Activity and Organization
You can click on the activity name. When clicking on the activity name you will be taken to the opportunity details page.
**Action Icons**
For each activity there will be Action Icons on the right side of the table. There are 5 different action icons that will allow you to track hours, add recurring hours, edit an existing hour entry, edit a recurring hour entry, and manage participants. If you hover over the action icons a message will display explaining the action.

- **Track Hours** – will display a modal to track hours for that activity.
- **Add Reoccurring Hours** – will display a modal to add a reoccurring hour’s entry for that activity.
- **Edit Hours** – will show after you have tracked hours for that activity and will display a modal to edit the previously track hours for that activity.
- **Edit Reoccurring Hours** – will show after you have added a reoccurring hour entry and will display a modal to edit the previously reoccurring hour for that activity.
- **Manage Participants** – will show when you are the Project Leader for that activity and will direct the volunteer to the Manage Participant page for that Activity.

**Add New Activity**
Clicking on Add New Activity will direct you to search for an Ohio State department. Enter the organization name and location. If you find the organization you worked with, select the organization by clicking “Track Hours.” Then, enter the opportunity and volunteering information and click “Save.” Still can’t find the organization? You can still track your hours! Click on the link at the bottom of the search results to manually input the organization’s information and track your hours. After selecting an organization or manually adding a new organization and adding the total number of hours volunteered, the date, answering the required questions, you
will be directed back to the home page. Upon returning to the home page after tracking hours you will see a message in green confirming the hours have been tracked. The table will also update and display the activity and hours that were entered.

“Impact Tab”
You will see a tab on your homepage that shows Ohio State’s overall goals and goal progress. There are a number of ways you can interact with this tab:

Site-Wide Goal
The graph at the top of the tab will show a site-wide volunteering goal, tracking real-time status.

Program Activity Graph
This graph displays site activity over time. You can switch between three different views: your personal, Ohio State volunteers in your state and the entire university’s activity.

Popular Causes
Here you’ll see the cause areas with the most sign-ups during the current month. Clicking a cause area displays related opportunities in your area.

Highlighted Volunteering Activities
Below your homepage tabs, you’ll see highlighted volunteering opportunities in your area. These are all local projects in the various university departments. Click on a project title to learn more about a specific opportunity, or select “MORE” to see additional opportunities. You can scroll through additional searches by selecting the arrow buttons.
Volunteer Experience: How Do I Find a Volunteer Opportunity?

Visit Ohio State VolunteerMatch at volunteer.osu.edu, enter in your location in the search bar, and select “search.” You’ll see filters on the left-hand side of the page. These filters take some of the most frequently used categories from the Advanced Search and allow you to quickly and easily narrow down your results based on these options.

Filtering Your Search Results

There are a total of 3 filter categories, Cause Areas, Show Me, and Suitable For. The Cause Area category will help you narrow down your search based on areas like animals, hunger, and disaster relief. There are a total of 27 cause areas; the filter column will display the 6 cause areas that have the most opportunities in your search area. The link to See All Cause Areas will display a modal with all 27 cause areas.

The Show Me category allows you to select local or virtual opportunities.

The Suitable For category explains if the opportunity is open to kids, teens, groups or seniors.
Selecting and Signing Up for an Opportunity

Once you have searched for an opportunity using the filters, click on the title of the opportunity that interests you to learn more. You’ll see basic information about the project, such as time, location, description and requirements.

To express your interest in the project, click “Signup.”

Complete the required information and click Send. If you are not already logged into your account, you will need to do so before continuing. You will be prompted to login/or create an account when you click “Signup.”

Once you’ve signed up for the opportunity, the project page will display the following options:

- **Status**: will show your attendance (e.g. will attend, may attend, waitlisted.) You can change your status by removing yourself from the project.
- **Waivers**: If you signed off on any waivers for this project, you can come back to this page to re-download the content.
- **Attachment**: If there were attachments sent to you when you signed up for the project (e.g. directions, waivers, information about the site, etc.), you can visit this page to re-download the content.
- **Opportunity Questions**: If you were asked opportunity specific questions when signing up for this project, you can visit this page to change your answers to these questions.
- **Calendar**: If there is a specific date for this project, you can choose to add it to your Google, Outlook, MSN or Yahoo calendar.
Posting and Managing Projects: MICROsites

Special Events & Projects
Special Event Manager offers a set of tools and features allowing you to effectively manage volunteer recruitment. Think of Special Events as containers, within which you can post as many Projects as you like. Projects have specific dates, times, and locations, though you can list ongoing or virtual projects as well. Follow the best practices later in this section to list these opportunities.

Each Special Event has its own customized microsite on VolunteerMatch where you can post your projects, event description, and photo. It also includes the ability to customize signup confirmation emails, schedule reminder emails, and set up auto hours tracking.

To manage your microsite, click Account in the top right, then click on Admin.

Depending on your access level, you will either be taken directly to the Special Event Manager for your microsite OR you will need to click “Special Event” in the orange bar, find the name of your microsite, and then click “Manage Event.”
Managing Your Special Event

You have many tools available to you through your Special Event Manager:

If Opportunity Builder has been enabled, you will see a pop up to approve projects that have been proposed. Click on “Click Here to View the Queue”. From there you can edit, approve or reject the project. You will also have the opportunity to add the proposer as the project leader or administrator and communicate with them about your decision.

Manage Administrators and Contacts

You can add additional administrators to your event. Special Event Admins have access just to this microsite and cannot run in-depth reports, though they can run the two reports in the signups and reporting box. Add new contacts when you want to update the project leader for a particular volunteer opportunity. If you would like expanded access for more indepth reports, please contact OVR.

Hours Tracking

You can track hours for your volunteers by selecting “Project Hours” then selecting the project. From there, enter in the date volunteered, the numbers of hours worked, and select each volunteer’s profile. Hours will be automatically added to their profile. You can also run reports on hours tracked towards your project.
Signups and Reporting
To run reports on who signed up for your project, click on “Run Signup Report.” You can then select one, or multiple projects, or see a specific date range. You may then export by selecting the excel icon. Keep in mind that depending on your administrative level you will see different information in this report. If you are a full site admin, you will see all user information, compared to a special event admin, who will see more limited information about each volunteer.

Manage Communications
Under “manage communications” you can email all project leaders, email all participants who have signed up for any of your project, email waitlisted volunteers or email participants from a specific project.

Manage Special Event
To edit your microsite, select “edit” under “manage special event.” You can also add a photo, which will appear on the homepage if your event is promoted, along with appearing on your campaign page.

Special Events Groups
Under “special event groups” you can see any groups that have been created.
Editing an Existing MICROSITE

To update an existing microsite click 'Edit' under 'Manage Special Event'. Enter the following information to complete the form.

**Excerpt & Description**
This is what will appear on your special event landing page

**Promote on Homepage**
**DO NOT CLICK ON THIS BOX.** The Office of Volunteer Relations will be promoting microsites in different ways; if this box is clicked OVR will edit immediately.

**Special Event Dates**
This date(s) for the campaign and projects will be visible on the site. For ongoing microsites, leave this date range long (e.g. through 1/1/2040).

**Recruitment Dates**
These are the dates within the Special Event Dates when volunteers can sign up for the projects under the campaign. **For ongoing campaigns, leave this date range long (e.g. through 1/1/2040).**

**Waivers**
If you desire, you can add a waiver (e.g. liability or photo waiver) that every participant on your microsite will be required to consent to during the signup process.

**Waitlist Options**
Turning on this feature will enable the waitlist for all projects under this campaign. You can choose to allow volunteers to see their placement (e.g. that they are 3rd out of 30 on the waitlist), and allow Project Leaders or Admins to override the waitlist (meaning that they can move someone up or down).
Auto Add Hours Options
Do you want to allow hours to be automatically added for a project? **Choosing yes will give you the option to turn this feature on/off for each project. If you choose no, this option will not be available for any of your projects.**

Opportunity Builder
You can opt to allow your microsite to accept volunteer-proposed projects or not. When an opportunity is proposed all administrators for the site will receive an email. You will then see a queue of proposed projects where you can approve or reject the opportunity. **This is important if you will be asking others to submit volunteer opportunities to you for approval and posting.**

Click 'Submit' to save the Special Event information.

Special Event Contact
This is the designated recipient for all project sign-up emails for a Special Event. In the event that you are recruiting Project Leaders for a Special Event, the Project Leaders become the recipient of sign-up emails for the specific project. Click 'Manage Contacts' under Manage Project Contacts. Use the 'Add New Contact' link on the right hand side of the page to add a new contact to a Special Event. Fill out the form and click 'Submit' to save the contact.

Edit your Special Event and select the appropriate contact in the Special Event Contact field. If the new Special Event contact does not have an existing VolunteerMatch account, they will receive a verification email after they are added. Please note that the Special Event and its projects will not be visible on the site until the account has been verified.
Adding and Editing Projects

To create a new opportunity, go to “add a project.” You can edit an existing project by selecting it in the quick tool drop down and selecting “edit project content.

1. Required: Give your opportunity a title. Then select a campaign and in most cases, this will be YOUR department/college/unit.

2. Required: Add the location of your opportunity including address. Note: if this is a virtual opportunity just click on virtual and the required address information will no show.

3. Required: Project Date and Time. Provide start and end date and start and end time for the project. If this is an on-going project just click “Ongoing.”

4. Required: How many volunteers do you need or can you accommodate an unlimited number of people?
5. **Required:** Write a description of your opportunity. Be as specific as possible so volunteers have a clear understanding of the expectations. (i.e. walking and picking up litter for 2 hours)

6. **Optional:** Skills and Requirements. What experience do you seek in your volunteers? (i.e. Graphic Design, Accounting, etc.)

7. **Required:** “NO” is the standard answer for this section. Your microsite is the non-profit benefitting from this opportunity.

8. **Required:**
- Tag your project with 1-3 categories (cause areas).
- Indicate the # of Volunteers Needed. After this # of signups is reached, the Project stops accepting signups or moves to a waitlist.

9. **Optional:** Tag your project with Keywords and if it is suitable for Groups, Kids, 55+ or Teens. Keywords will not appear on the Project Sign Up page.
Multi-Zip
The default search radius on VolunteerMatch is 20 miles. By utilizing Multi-ZIP Coverage, you can post your volunteer opportunity across a broader range of ZIP codes, such as a specific city, county, state or even nationwide. Your listing will appear in regions contained within the ZIP code range you select.

Automatically Add Hours
This tool is designed to make it easy for your site administrators to automatically track participants’ hours for projects they are managing.

How it works: As Special Event Administrators post projects, they can now opt to automatically track hours for all participants after the project occurs, including answering hours tracking custom questions. Just set it and forget it, knowing that your reporting will be complete at project end!

Adding Photos
Special Event Manager allows you to display photos on project pages. Images are a great way to bring your listing to life, encourage volunteers to get involved, and highlight upcoming events.

Please upload a high quality image in JPEG, GIF, or PNG format. You’ll get best results if the image uploaded is no larger than 1 or 2 MB. We will automatically resize the image for best display.

You can edit or delete your photos on your Special Event Manager dashboard and selecting "Photo Manager" under "Customize Projects."
**Project Custom Questions**
Use the Custom Question Manager to add and manage questions that will accompany your listings. When a volunteer signs-up for a listing the questions that are selected for that listing will be asked.

You can edit or delete your questions on your Special Event Manager dashboard and selecting "Custom Question Manager" under "Customize Projects."

**Signup Confirmation Email**
Use the Greeting Manager to save customized greetings for your listings. The content for the greeting you select for your listing will be emailed to volunteers who sign-up for that listing. You can edit or delete your greeting on your Special Event Manager dashboard and selecting "Greeting Manager" under "Customize Projects."

**Signup Confirmation Email Attachments**
Select the documents you wish to send with the volunteer greeting email. You can edit or delete your documents on your Special Event Manager dashboard and selecting "Document Manager" under "Customize Projects."

**Pre and Post Project Alerts**
Project Alerts allow you to set up a customized e-mail that will automatically be sent to project attendees a set number of days before a project starts (pre-project alert) or after a project ends (post-project alert). Select “Alert Manager” under “Customize Projects” to edit.

The e-mail can have any message you like, including important project details, directions to the event, maps and parking permits, a reminder to track hours, etc.
Adding a Project Leader

Once you have posted your project, don’t forget to assign your project leader or admin. On the details page OR the Manage Participants page, you can click Edit to “add project leader”.

Once on the Manage Participants page, select “Edit” in the opportunity admin/leader box and enter in the contact’s email address. The Project Leader must have an existing Ohio State VolunteerMatch account.

To learn the difference between project leader and project administrator see next page.
Managing Participants

The Manage Participants Page is a one-stop tool that empowers you to manage participants with simple filters and bulk actions.

Getting to the Manage Participants Page

If you are the leader for a specific project, you will find a megaphone icon in your “Your Volunteering” table next to the project name. By clicking on this icon, you will be brought to the Manage Participants Page.

If you are assigned by someone else as a project leader, you will also receive an email with a direct link to the page.

Opportunity Admins and Leaders

There are two admin levels to manage a project – a Leader and an Admin (details about the permissions to the right).

For each project, you choose between recruiting for a leader or assigning an admin/leader. If you choose to recruit, a volunteer can sign up for the position.

To recruit a leader, select “Edit” to under “Opportunity Admin” box. Select "Recruit a leader". If you’d like to write a position name and description, that will appear as a volunteer signs up.

To assign a Leader or Admin, follow these steps:

1. Select “Edit” under “Opportunity Admin”
2. Select “Assign Leader” and “Next”
3. Enter the email of the leader (note that the email must be associated with a VolunteerMatch account)
4. Select the admin level you would like the user to have

If needed, you can reassign or remove the Admin/Leader by selecting “Edit.”
Managing Participants: Attendee List

Through the Manage Participants interface, you can gather information about each participant’s signup (how and who signed them up, if they’ve confirmed), see if they’ve completed their questions, add or remove participants, send emails to groups or track hours for attendees.

SELECT & TAKE BULK ACTION
Check the top box to select all volunteers or select individuals to take bulk actions (icons at top right):

- Change attendance (remove, move to waitlist)
- Email selected participants
- Track hours for volunteers

ATTENDANCE VIEW
Through this filter, you can view the different lists for your program. Your default view will show attending. To view waitlisted or removed attendees, click on the appropriate list.

SORT & FILTER
Click the gray arrow to sort or filter based on the available options. Once you select an option, the list will automatically update.

STATUS
The column shows 3 statuses:
- Attending (confirmed): a volunteer who signed themselves up or has confirmed.
- Attending (not confirmed): a volunteer who was signed up by someone else & has not yet confirmed.
- Attending (ext. guest): a guest who was signed up by someone else and doesn’t have access to confirm.

Additional statuses will show in other views or in export:
- Removed: not attending
- Waitlist: on the waitlist

SIGNUP METHOD
Shows how the volunteer was added to the project:
- Self: signed up themselves.
- Admin: an admin assigned them to the project from the participants page.
- Host: signed up using Guest Signup.

QUESTIONS STATUS
If the volunteer has answered all of their signup questions, this will show “complete”. If not, this column will show “incomplete.”

SIGNED UP BY
If the volunteer was signed up by an admin or a host, the name of the admin/host will appear in this column.
Managing Participants: Advanced Tools

Managing the Waitlist
If there are volunteers on the waitlist, select "Waitlist" from the Attendance View to manage the waitlist.

To reorder the waitlist, click on the icon to edit waitlist order.

Select a participant and drag and drop their name to the new desired order. Select save to update the new order.

Reports
To export your attendee list to excel, select the icon to export:
This will create an excel file of all participant information (including waitlist and removed attendees). This will include: participant name, email, status, signup method, signed up by information, host email, number of hours tracked, and project questions answers.

**Tracking Hours**
To track hours for participants, go to your attending Attendance View. Select all (or some) attendees, then select the Hours Tracking icon:

Enter a date, the number of hours volunteered select “Next” to answer the required hours tracking questions.

You can choose to notify participants - they will receive a standard email with the number of hours tracked, and the opportunity to view the hours that have been tracked.