

# VoRIS User Manual



VoRIS is a flexible secure volunteer management system with automation features that can help you manage thousands of volunteers at even complex events.

## *Volunteers*

- Volunteers are able to register themselves and modify their schedules as their availability changes.
- Volunteers have access to their own attendance reports.
- Volunteers may register on mobile phones or desktop computers.



## *Messaging*

- Unlimited emails are included with the system.
- Text messaging, from a phone number in your area, is also available.
- Both texting and email messages may be customized with personal information about the volunteer, such as their name, username, language, address, etc...
- Both texting and email messages may be customized with information about their assignments such as the start time, assignment name, event address, etc...
- Emails may be customized with your pictures.

## *Event Management*

- You may define an unlimited number of events and assignment types.
- The system contains a fully automated waiting list process. With parameters you define the system can keep waiting lists for assignments and automatically "promote" volunteers and notify them when someone cancels and they are next on the list.
- The system can automatically handle text and email reminders for your events using the parameters you set up. The wording for these reminders is up to you and may contain start times and any other information you need.
- Emails and text documents may contain links to your assignment orientation web pages or documents.
- The system contains extensive reports and exporting capabilities to help you keep up with the information you need about your events.

## *Usage Requirements*

- VoRIS is a secure hosted software service requiring only a web browser to use. No special hardware or software is required.



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## Register a volunteer – what the volunteers will see

The following gives the overall view of what a volunteer will see when they register on the system.

Go to your website - usually: <http://volunteer.your-web-domain.org>

### Registration introduction and header explanation

Go down the page filling out the form with information for a pretend volunteer. I suggest you enter a real email address so that you may see the email response to a registration and also be able to RECALL and change your registration.

In your own VoRIS system you will be able to modify:

1. The introduction to your registration page (seen below).
2. The logos seen on this page (even on your demo system you can change them).
3. You will be able to add more questions and modify several pieces of text on the page.

The screenshot shows the registration page for Westside Food Kitchen. The page has a dark blue header with navigation links: Home, Register, Check-In, Reports, Messaging, Admin Functions, and Logoff. Below the header is a blue banner with the text 'Westside Food Kitchen' and a photo of people in a kitchen. The main content area has a white background. It starts with a thank you message and a note about the demo system. Below this is a red button labeled 'Recall My Information' and a green box labeled 'Contact Information'. The 'Contact Information' section contains three input fields: 'Abbreviated Title', 'First Name', and 'Last Name'. A red oval is drawn around the 'Recall My Information' button and the 'Contact Information' section.

Home Register Check-In Reports Messaging Admin Functions Logoff

## Westside Food Kitchen

Thank you for your interest in the VSpark volunteer system. This is the demo volunteer system. You may sign up to volunteer at an imaginary event to help you learn how the system works.

(This registration page header text may be updated by clicking on the Admin Functions menu and selecting "Customize System Text".)

**PLEASE REMEMBER**

Click SAVE AND SUBMIT at the end of the page to save your new or revised information.

**Recall My Information** If you previously registered on this webpage, we will recall your information. Do not RECALL your information and type over it for another family member. That overlays the existing record.

**Contact Information**

Abbreviated Title  Example: Mr., Ms., Dr., Hon.

First Name

Last Name

See [Customizing Registration Text](#) later in this document.

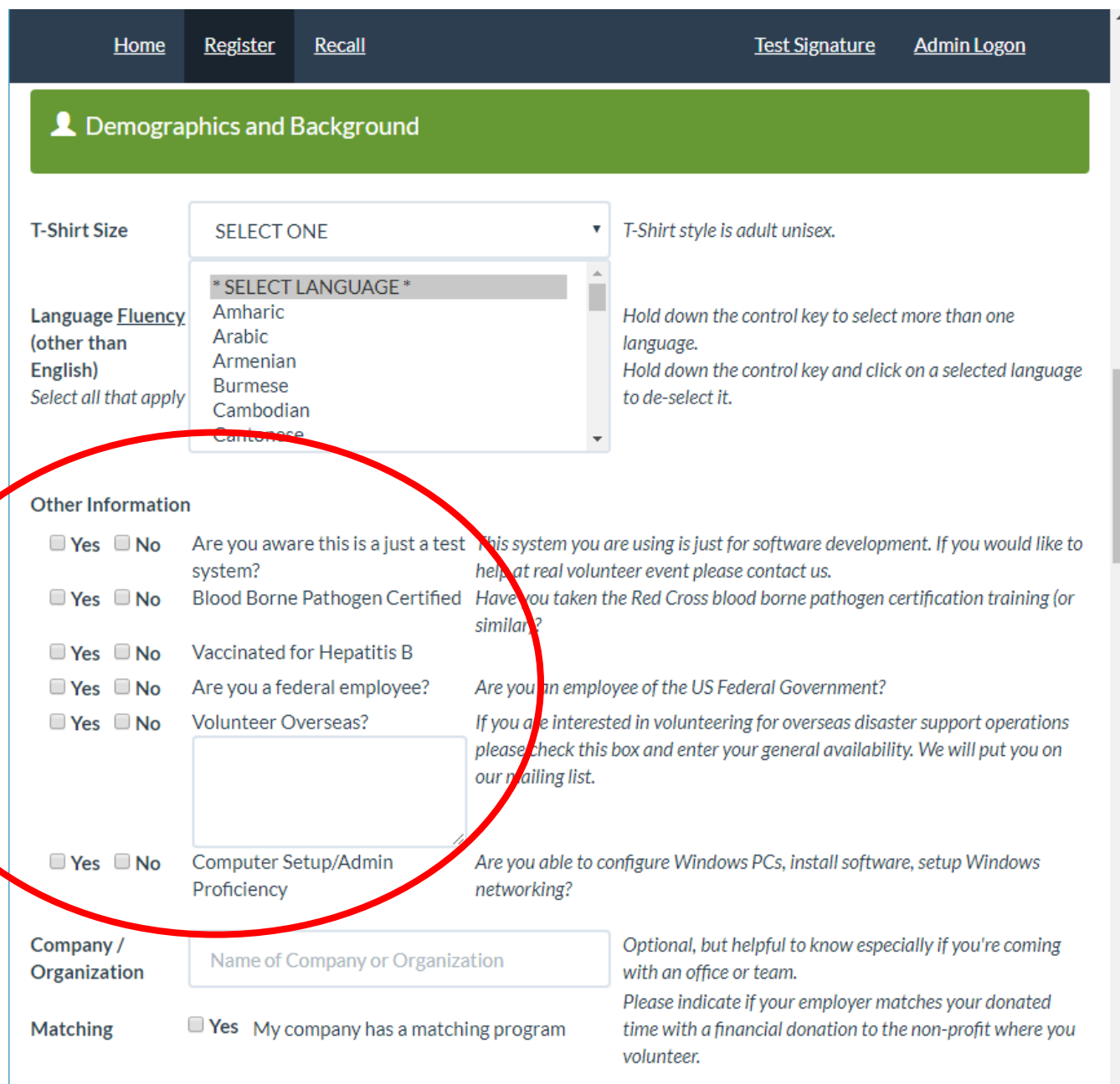
The system will ask name, address, email, phone, and ask for a user name and password.

Name on badge	Name on badge	Example: Dr. Jeff, Ms. King, Sam
Contact Phone with Area Code	Contact Phone with Area Code	
Confirm Phone	Re-Enter Phone with Area Code	
Phone Type	SELECT ONE	If possible, we would like to text you with occasional reminders and pertinent updates.
Mailing Address Line 1	Mailing Address Line 1	Include apartment, suite or box number, if applicable.
Mailing Address Line 2	Mailing Address Line 2	
City	City	
State	SELECT ONE	
Zip Code	Zip Code	
Email Address	Email Address	We recommend an email address unique to the registered volunteer instead of a shared office address or the personal address of a group leader for all group members. We will send personalized scheduling correspondence to this address.
Confirm Email Address	Re-Enter Email Address	
User Name	MIKEW	Establish your unique User Name. You may use your email address as your User Name unless another registered volunteer will be receiving correspondence at that same address.
Password	*****	Used to recall your information when you visit this site again so you can make changes and/or select additional volunteer opportunities. Your password must be at least 6 characters.
Confirm Password	Re-Enter Password	

The phone may optionally be used to send them text messages from the system. The user name and password allow them to get back into the system and change their registration or sign up for more events.

## Demographic information and other volunteer questions

One of the things you will be able to do is update/add volunteer questions. Questions asked of ALL volunteers are called volunteer “attributes” and show up in the Demographics and Background section after the OTHER INFORMATION title.



[Home](#) [Register](#) [Recall](#) [Test Signature](#) [Admin Logon](#)

### Demographics and Background

**T-Shirt Size** SELECT ONE T-Shirt style is adult unisex.

**Language Fluency (other than English)** Select all that apply

**\* SELECT LANGUAGE \***

- Amharic
- Arabic
- Armenian
- Burmese
- Cambodian
- Cantonese

Hold down the control key to select more than one language.  
Hold down the control key and click on a selected language to de-select it.

**Other Information**

☐ Yes ☐ No Are you aware this is a just a test system? This system you are using is just for software development. If you would like to help at real volunteer event please contact us.

☐ Yes ☐ No Blood Borne Pathogen Certified Have you taken the Red Cross blood borne pathogen certification training (or similar)?

☐ Yes ☐ No Vaccinated for Hepatitis B

☐ Yes ☐ No Are you a federal employee? Are you an employee of the US Federal Government?

☐ Yes ☐ No Volunteer Overseas? If you are interested in volunteering for overseas disaster support operations please check this box and enter your general availability. We will put you on our mailing list.

☐ Yes ☐ No Computer Setup/Admin Proficiency Are you able to configure Windows PCs, install software, setup Windows networking?

**Company / Organization** Name of Company or Organization Optional, but helpful to know especially if you're coming with an office or team.

**Matching** ☐ Yes My company has a matching program Please indicate if your employer matches your donated time with a financial donation to the non-profit where you volunteer.

All of the questions listed under OTHER INFORMATION are under your control. You may have no additional questions or any number.

See the section on configuring *Volunteer Attributes* in this document.



## Volunteer professions

Next each volunteer selects their PROFESSION. You may define any number of professions (skills) you need of your volunteers. They may be cooks, dentists, general volunteers, lawyers, computer experts, or any other professions which will help you manage your volunteer pool. You don't need to define professions you will not be using directly for your events.

You may divide up your volunteers into AREAS if that helps. Many reports are divided up into AREAS to help you better understand your events. If you have more complex volunteer events with medical professionals, legal professionals, or other specific sets of skills, you may want to divide your professions into AREAS.

For now select the event area of Dental and Profession of Dental Assistant. If the dental assistant profession required a license or certification then the system would also be asking questions related to that license.



[Home](#) [Register](#) [Recall](#) [Switch Organization](#) [Admin Logon](#)

Profession or Volunteer Classification

Event Area

Dental

Profession / Classification

Dental Assistant

Select the area appropriate to your profession / classification.

Events

Event

2017 Rose Bowl Clinic

To sign up for multiple events, complete your entire registration and assignment selections for the first event and click SAVE AND SUBMIT. Then come back to choose a second event and make assignment selections. Again, click SAVE AND SUBMIT to ensure its complete.

## Selecting the volunteer event

Your volunteers will then select their EVENT. You are able to have hundreds of events open for registration at any given time so name your events simply so volunteers can find them.

Event

2017 Rose Bowl Clinic

assignment selections for the first event and click SAVE AND SUBMIT. Then come back to choose a second event and make assignment selections. Again, click SAVE AND SUBMIT to ensure its complete.

Event Location

1228 Rose Ave, Pasadena, CA 91000

More detailed directions will be available prior to your arrival.

Event Email

mikew@TheSparkTeam.org

Please add this information to your safe senders/callers list.

Event Phone

626 277 5111

Event Information

<https://seattlecenter.org/volunteers>

For each date select an assignment or "Not Attending This Day." If your preferred assignment is full, a waiting list option may be shown. If you choose to be on the waiting list for your preferred assignment (i.e. Computer Support) you will be given the option to select an alternate assignment (i.e. General Support). If an opening becomes available in your preferred assignment and you are moved from the waiting list, you will receive an email notice of this change. If you also selected an alternate assignment, you will be automatically canceled from the alternate assignment.

Admin Code

For administrative or instructed use only.

Day	Type	Assignment
Mon Oct 23	Set Up	Not attending this day
Tue Oct 24	Set Up	(G) Food Preparation - Set Up, 1st Shift @ 9:00AM to 4:00PM
Wed Oct 25	Set Up	(G) General Support - As Assigned @ 9:00AM to 5:00PM * Waiting List *
	You are on a waiting list.	Alternate: (G) Food Service - Wednesday Lunch & Set Up @ 11:30AM to 5:30PM
Thu Oct 26	Clinic	(D) Dental X-Ray Computer Station @ 6:00AM to 6:00PM
Fri Oct 27	Clinic	


Next your volunteers will select their assignments. They have a single selection each day. The list shows the name of the assignment plus the start and end times. VoRIS automatically handles **Waiting Lists** for you. As you can see in the example above, their selected Wednesday assignment put them on a waiting list. They selected an alternate assignment for Food Services on Wednesday.

With waiting list processing, if someone with the assignment cancels, those waiting are automatically "promoted" and emails and text messages go out to alert the volunteer that they are no longer on the waiting list.

The available ASSIGNMENTS may be restricted by PROFESSION. Therefore if you have assignments for dentists, or airline pilots, we can limit dentist or pilot ASSIGNMENTS so they are only seen for volunteers identified as the required professions. This is especially helpful with volunteer assignments which require some special certifications, licenses, or insurance.

## Liability waiver

The next part of registration (as you scroll down) is the LIABILITY WAIVER. You have complete control over the wording of this waiver and also what this section is called. You may change the wording in the RED box below calling this section the “Volunteer Agreement” or something else.

 **Liability Waiver**

Thank you for volunteering at our event. Each volunteer is required to read and sign this Volunteer Agreement and Liability Waiver as a condition of participating in the event.

By signing below, I, the undersigned volunteer, agree to provide services to as a volunteer. As a condition of volunteering, I agree as follows:

1. I am donating my services and I am not entitled to any present or future salary, wages, or other benefits.
2. I knowingly assume the risk of participating as a volunteer. In consideration of participating as a volunteer, I, for myself, my spouse, my legal representatives, heirs, and assigns, hereby forever unconditionally waive all claims (in law, equity, or otherwise) against this organization, and their respective subsidiaries, affiliates, partners, officers, trustees, officials, employees, and agents, and volunteers, arising out of my participation in the these events.
3. In compliance with the federal and state privacy laws, I agree to hold in confidence all personal and protected health information I may overhear or come in contact with during and following the performance of my volunteer duties. I further agree not to access, or remove from the premises, personal and protected health

Your volunteers will be reading and signing this waiver during the registration process.

## Signing the liability waiver

At the end of the Liability Waiver they will be signing that they understand it on the screen. This is done with the mouse on desktop computers or if you have a touch screen device, such as a tablet or smartphone, this can be done by touching the screen.



## Completing the registration

To complete the registration just press the red [Save and Submit] button. The system checks the form for completeness and saves the information.

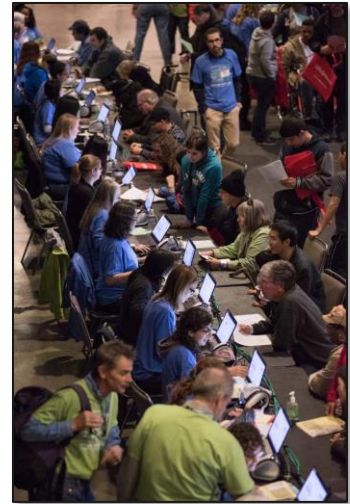
## Registration notifications

Once they have submitted their registration, your volunteers will receive an email which verifies all their information and gives them their schedule. If you have configured text messaging, they will also receive a text message confirming their registration.

## Configuring your system

You will be configuring the following parts of your volunteer system.

1. Define **assignments** – Your system may have any number of assignments defined broken down into sections such as Dental, Vision, Medical, and General volunteers.
2. Define **volunteer attributes** – These are questions that will be asked of all volunteers. These questions may optionally expand into additional questions. For example if you ask if the volunteer is a federal employee additional questions may then popup asking what department.
3. Define **volunteer professions** – Volunteers identify their profession when volunteering. You only need to define the general professions you need at your clinic. These professions are things like Dentist, truck driver, optician, nurse. Using these professions VoRIS is able to limit the types of volunteer assignments the system allows them to select.
4. Define your **registration questions** – You may define any number of questions in your system. These questions may be associated with specific assignments or with volunteer attributes (asked of all volunteers). With these questions you are able to ask dentists if they are bringing an assistant or if a general volunteer is able to lift 25 lbs.
5. Define your **events / clinics** – Your system may contain any number of events. These events are collections of dates and assignments. With an event each assignment may have a maximum number of volunteers specified which enables the VoRIS automated waiting list processing.
6. Define your **messaging** – VoRIS may send text messages and emails to your volunteers either manually or using automation rules. These messages may be customized to include assignment details for the volunteer and other information.
7. Configure the **system text** – With VoRIS you are able to define the text that appears in many places on the volunteer registration page.



## Define your assignments

Menu: Admin Functions → Assignment Definitions

You may have any number of specific assignment types defined in the system. You may have just two, general volunteer and computer tech, or break things down into hundreds of specific assignment types.

These assignment definitions are then connected to an event. You may have one volunteer event needing just nurses, general volunteers, and cooks. Another event needs lawyers, cooks, event managers, line control volunteers, parking volunteers....

Home Register Check-In Reports Messaging Admin Functions Logoff

### Setup Assignment Definitions and Defaults

These are the assignments which may be selected for volunteer opportunities.

General Volunteers export add assignment

	Area	Name	Public Assignment Default	Setup Needed Default	Event Needed Default	Wait List Default	Start Time Default	End Time Default	Max Vols Default	Linked Profs	All Prof	
Edit	Gen	Computer Support	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	07:00:00	18:30:00	10	0	<input checked="" type="checkbox"/>	Delete
Edit	Gen	Event Manager	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	07:00:00	18:30:00	20	0	<input type="checkbox"/>	Delete
Edit	Gen	General Volunteer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	07:00:00	18:30:00	100	0	<input checked="" type="checkbox"/>	Delete
Edit	Gen	Volunteer Registration	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	07:00:00	18:30:00	10	0	<input checked="" type="checkbox"/>	Delete

Assignment definitions may be associated with specific professions or they may be generally open to anyone who signs up. Examples:

- A dentist assignment is only available to people who identify themselves with a dental profession.
- A general volunteer assignment is available to anyone who signs up.
- Anyone can sign up as a lawyer because hey, how hard is it to be a lawyer?

Parameter specifics when defining an assignment:

- **ALL PROF** -- Check *ALL PROFESSIONS* if any profession will be able to select this assignment. If the assignment is "public", which means people can see it, then it will be available to all professions. General volunteer assignments are usually ALL PROF. But an assignment like a doctor needs licensing and special skills. So specific doctor professions are connected to the assignment allowing the doctors to select that assignment.
  - NOTE: This is optional. You may not need this control of your assignments and set them all up as ALL PROF. Don't make your system more complex than it needs to be.
- **SETUP NEEDED DEFAULT** -- Check this and when you associate this assignment with an event it will be automatically added to all the setup/takedown days of the event.

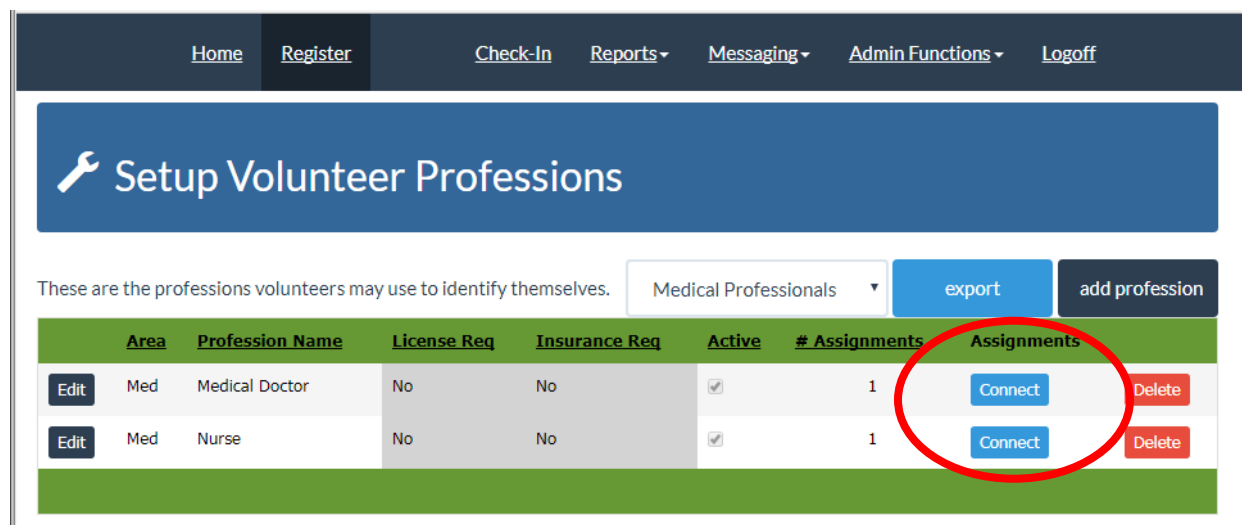
- **EVENT NEEDED DEFAULT** -- Check this and when you associate this assignment with an event it will be automatically added to all the clinic/event days of the event.
- **PUBLIC ASSIGNMENT DEFAULT** -- If this is checked then volunteers can see this assignment if it is allowed for their profession. If not checked then this assignment is only seen if they use the special event password. This is just the default and may be overridden by event.
- **START TIME / END TIME** -- These are just the defaults and may be overridden by event.
- **WAIT LIST DEFAULT** -- Will this assignment allow waiting list processing? This is just the default and may be overridden by event.
- **ASSIGNMENT NAME** -- If the Assignment name is highlighted in yellow then the assignment is "public" by default but does not have "all professions may volunteer" checked. This means that only volunteers identified as specific professions will see this assignment and be able to select it. Check the "linked professions" column, which is a count of the professions linked to this assignment, to make sure you have linked professions.

Please note that most of these parameters are just defaults. When you add this assignment to an event these are the initial values. But you can change these values for specific events.

## Professions

Each volunteer signing up will identify their “profession” as it relates to your clinic. You will only need to define professions that relate to your clinics such as doctors, nurses, dental assistants, etc.... The profession allows us to control the assignments a volunteer may select. For example, a volunteer identified as a nurse can not select a dentist assignment. This prevents errors.

Menu: Admin Functions → Professions



Home Register Check-In Reports Messaging Admin Functions Logoff

### Setup Volunteer Professions

These are the professions volunteers may use to identify themselves. Medical Professionals export add profession

	Area	Profession Name	License Req	Insurance Req	Active	# Assignments	Assignments
Edit	Med	Medical Doctor	No	No	<input checked="" type="checkbox"/>	1	Connect Delete
Edit	Med	Nurse	No	No	<input checked="" type="checkbox"/>	1	Connect Delete

You only need to define the professions that relate to your events. If you don't need pilot or medical doctor or school teacher skills at your events, you do not need to set up those professions in your system. In most organizations most of your volunteers will just sign up as "general volunteers" and not need to specify a specific profession.

Depending on the complexity of your events you may break down your volunteers by AREA. If your events don't have a lot of specialized skills such as medical doctor, scuba diver, astronaut, or lawyer then you may just have one area (general) and a few professions.

## Connecting professions to assignments

Professions will often be connected to assignment definitions. This is how you limit dentist assignments to only those with a dentist profession. General volunteers or nurses or lawyers can't sign up as dentists. They won't even see that assignment when they register since it will not be “connected”.

	Area	Profession Name	License Req	Insurance Req	Active	# Assignments	Assignments
Edit	Med	Medical Doctor	No	No	<input checked="" type="checkbox"/>	1	Connect Delete

The way to do this is to open the professions page then use the blue [Connect] button to select the assignments this profession will have access to.




This connection process is all optional. You may not have assignments which need to be restricted by profession. Most of your assignments may be defined with ALL PROF checked (*all professions*).

## Volunteer Attributes

To create a Volunteer Attribute, which is seen by all volunteers, click on menu:

**Admin Functions → Attributes**


**Setup Volunteer Attributes - questions for all volunteers**

These are the attributes volunteers may select to describe themselves. These are not associated with a specific volunteer opportunity. These are shown for all volunteers. add attribute

	Attr Name (75 char)	Screen Order	Explain Attr (500 char)	Conditional Question(s)	Comment?	On Badge?	Badge Code	Active?	
<span>Edit</span>	Are you aware this is a just a test system?	1	This system you are using is just for software development. If you would like to help at real volunteer event please contact us.	* none *	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<span>Delete</span>
<span>Edit</span>	Blood Borne Pathogen Certified	1001	Have you taken the Red Cross blood borne pathogen certification training (or similar)?	* none *	<input type="checkbox"/>	<input checked="" type="checkbox"/>	BBP	<input checked="" type="checkbox"/>	<span>Delete</span>
<span>Edit</span>	Vaccinated for Hepatitis B	1002		* none *	<input type="checkbox"/>	<input checked="" type="checkbox"/>	HepB	<input checked="" type="checkbox"/>	<span>Delete</span>
<span>Edit</span>	Are you a federal employee?	1200	Are you an employee of the US Federal Government?	Federal Employees	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<span>Delete</span>

Click the [Add Attribute] button to add a new volunteer attribute.

All of these attributes display as a ☐ Yes ☐ No set of checkboxes. The volunteer will have to select one of these to continue.

**Attr Name** is the wording the volunteer will see on the registration page to the left of the checkboxes.

**Screen Order** allows you to control the order the attributes appear on the registration page.

**Explain Attr** is the wording to the right of the checkboxes.

**Conditional Questions(s)** points to the associated question set. This allows you to connect a series of additional questions to an attribute if the volunteer selects YES for the attribute. See the next topic on **Volunteer Attribute Sub Questions**.

**Comment** if checked also displays a text field for the volunteer to enter additional data.

**On Badge?** If checked then this attribute prints on the default volunteer badge.

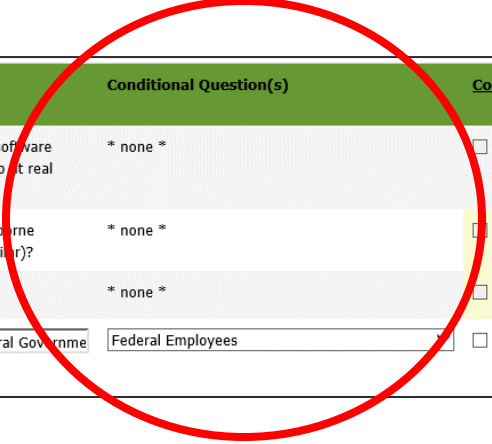
## Volunteer Attribute Sub-Questions

In some cases you may want to ask all your volunteers more complex questions than just yes/no questions. In this case you may setup Volunteer Attribute Sub-Questions. With this feature a volunteer attribute is setup and associated with a Registration Question Set. If the volunteer checks YES for the attribute then a series of other questions, including dropdownlists, yes/no questions, and text questions may be asked.

To do this first setup a Registration Question Set. See the section of this document titled Registration Question Sets.

Next create a volunteer attribute. See the previous section for these instructions.

When creating a volunteer attribute with associated sub-questions select a previously defined question set.



	Attr Name (75 char)	Screen Order	Explain Attr (500 char)	Conditional Question(s)	Comment?
<a href="#">Edit</a>	Are you aware this is a just a test system?	1	This system you are using is just for software development. If you would like to help it real volunteer event please contact us.	* none *	<input type="checkbox"/>
<a href="#">Edit</a>	Blood Borne Pathogen Certified	1001	Have you taken the Red Cross blood borne pathogen certification training (or similar)?	* none *	<input type="checkbox"/>
<a href="#">Edit</a>	Vaccinated for Hepatitis B	1002		* none *	<input type="checkbox"/>
<a href="#">Update</a> <a href="#">Cancel</a>	<input type="text" value="Are you a federal employee?"/>	<input type="text" value="1200"/>	<input type="text" value="Are you an employee of the US Federal Government"/>	<input type="text" value="Federal Employees"/>	<input type="checkbox"/>

To use sub-questions, just use the Conditional Questions dropdownlist to select your previously setup Question Set.

See the topic Registration Question Sets for information on creating the question sets used here.

With one of these volunteer attributes if the volunteer answers yes to a question then the additional questions popup for them to answer. If the respond no for the volunteer attribute question then the additional questions do not show up.

## Registration Question Sets

Your system may be configured with Registration Question Sets which may be connected to Assignments and/or Volunteer Attributes. These are questions which only display if the volunteer selects certain assignments or if they click YES for the associated volunteer attribute.

As an example if you have a dentist that selects a dentist assignment, they may get a question set containing questions like “are you willing to work 2 dental chairs?”. General volunteers may be asked questions about lifting. Cooks may be asked questions about their cooking experience.

Or you may have a volunteer attribute asking all volunteers, regardless of their assignments, if they are a federal employee. If they answer yes then they will see other questions about their department.

Assignment Questions are optional and it may be for you that most of your assignments do not have extra questions. An example of a question set is shown below.



☒ Assignment Specific Questions (If Any)

☒ Yes ☐ No

Are you comfortable doing a lot of walking or standing and going up and down stairs?

☒ Yes ☐ No

I understand that the times indicated next to my selected assignment(s) are the start (check-in) and end times for my shift(s).

☒ Yes ☐ No

I understand that Directors and Leads will do their best to honor the assignment I selected, but I realize that flexibility is critical to the success of the Clinic and that I may be moved to other assignments relative to my expertise dependent on where there is the greatest need.

☒ Yes ☐ No

I understand that set-up and take-down days are physically active. While I won't be required to lift heavy items, I am prepared to be moving a lot.

To create a question set use menu: **Admin Functions → Setup Registration Questions**

Click the black [add question set] button to add the header for a question set. Enter the question set name and description. Then click on the blue [Questions] button to add all the questions.

✓ Setup Questions for this Question Set

### Question Set: Federal Employees

These are the questions within this question set. Active questions show up on the volunteer registration page if the assignment is selected.

add question

	Sort Order	Question Label	Question	Type		Use Count	Require Yes	Active	
Edit	100	Federal Emp Dept	Please select the department of the US Federal Government?	Drop down	answers	0	True	True	Delete
Edit	200	Retired	Are you retired?	Yes/No		0	False	True	Delete

To add answers for a DropDownList click the orange [answers] button and type in the items for the dropdownlist. Click the [add answer] to add more answers. The answers are shown in alphabetical order. The Answer # shown is the internal number used if you need reporting done on the answers.

✓ Dropdown List Options


add answer

	Answer	Active	Answer #	
Edit	Air Force	<input checked="" type="checkbox"/>	36	Delete
Edit	Army	<input checked="" type="checkbox"/>	35	Delete
Edit	Coast Guard	<input checked="" type="checkbox"/>	37	Delete
Edit	Dept of Health and Human Services (HHS) - non-uniformed	<input checked="" type="checkbox"/>	39	Delete

These Question Sets may be used with Volunteer Attributes or Assignments.

## Customizing registration text

Menu: Admin Functions → Customize System Text

 **System Text - Customizing Registration**

☐ Show Inactive?

export

	Template Name	Template #	SYS	Type	Description
Edit	Liability Insurance	408	SYS	Text Part	Used on the Registration Page next to the liability field if they have identified a profession needing a license. It is intended to explain their liability insurance need and procedures (if any).
Edit	Registration - Below Event	411	SYS	Text Part	This is the text on the registration page below the events drop down list.
Edit	Registration Disclaimer	405	SYS	Text Part	This the liability waiver that all volunteers must sign. Don't change the Text Piece Name!
Edit	Registration Event Dropdown	410	SYS	Text Part	This is the explanation on the registration page of the event dropdown list field.
Edit	Registration Header	404	SYS	Text Part	This is the welcome message at the top of the Volunteer Registration page. Be very careful changing this.
Edit	Registration Student Explanation	407	SYS	Text Part	This is displayed on the Registration page when the Healthcare Student box is checked. Careful, mess this up and registration stops working!!! Best to copy and test!
Edit	State of Licensure	409	SYS	Text Part	This is the explanation on the registration page of the State of Licensure field
Edit	Successful Registration Page	406	SYS	Text Part	This is the page that is displayed immediately after a volunteer successfully registers or submits updates. ** This is also used if they edit their registration and don't enter an event. This is hard coded into the system! **

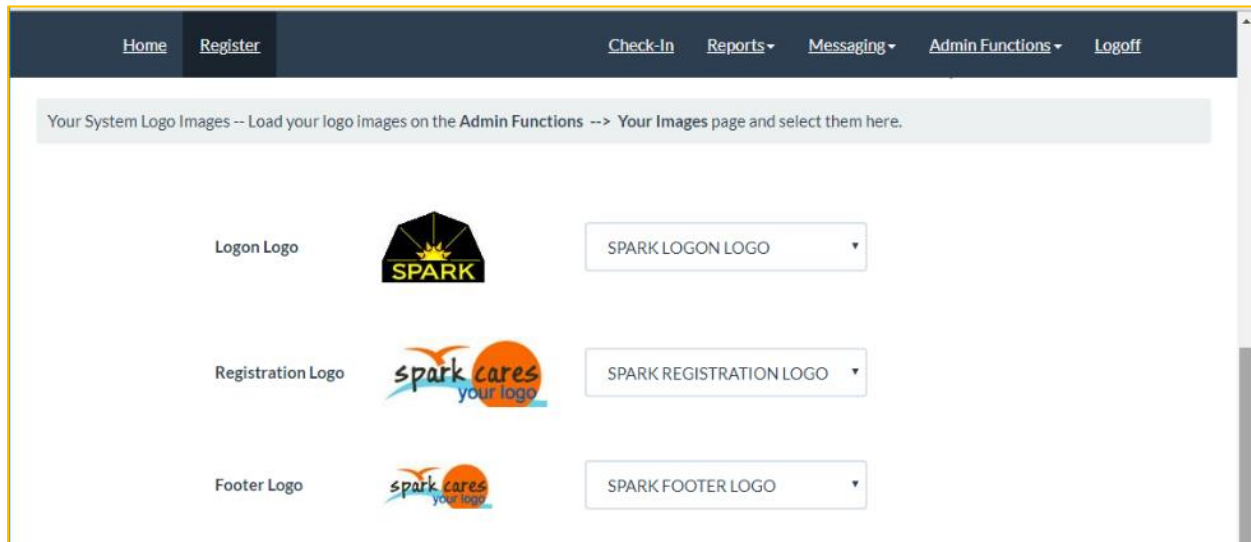
This is where you fine tune your registration system. You are able to update the wording in many different places to make the system match your needs.

## Setting your logos

Your customer setup page now contains controls to allow you to select your logos. Logos are added to the VoRIS cloud storage by uploading the images in the menu **Admin Functions → Your images and files**. See the section of this document titled “Adding images and files to your VoRIS system” for more information on how logos may be added to your system. Logos are just a specially formatted image.

Your customer setup page is located at: **Admin Functions → Customer Setup**

Scroll down to see the System Logos section.



The system has three different logos defined.

1. The Logon Logo is displayed on the volunteer and administrator logon page.
2. The Registration Logo is displayed on the volunteer registration page. Both on the mobile version and the desktop version.
3. The Footer Logo is displayed on the bottom of each page.

Logos on your pages are optional but help brand your volunteer website.

When you upload images, you mark them as a “logo” to make them easier to find and get them sized to the correct size. Only images marked as a logo will show up on the drop-down lists for this page.

You may want a temporary holiday logo or some other temporary logo?

## Creating volunteer events

Your system supports any number of events. They may occur simultaneously in different parts of the world or you may just have a single event per month at a local community center.

### Basic event information record

Menu: Admin Functions → Events

You may set up any number of events. The basic event record defines the contact information for your event, address, contact email, phone, the event URL, and many other parameters.

The screenshot shows the 'Edit Volunteer Event' interface. At the top, there's a navigation bar with links: Home, Register, Check-In, Reports, Messaging, Admin Functions, and Logoff. Below this is a blue header with a person icon and the title 'Edit Volunteer Event'. The main form area has a 'save' button and a list of fields with their respective descriptions:

- Full Name:** Sample Event. Full name of the volunteer event. This is used in text and email messages and on the registration pages.
- Short Name:** Sample. 12 character name used in some reports to identify this event.
- Address:** 111 Main St., Pasadena, CA 91104. Full address where the volunteers would report.
- Contact Email:** mikew@TheSparkTeam.org. Displayed on registration page.
- Contact Phone:** (000) 555-1212. This shows up on the registration page and may be inserted into automated text and email messages.
- Event URL:** http://www.TheSparkTeam.org. If this specific event has a web page for information put it here. It needs the "http://".
- Waiting List?** ☒ Yes. Allow waiting list processing? Unchecking this box turns off the process that automatically fills waiting list assignments and will not let anyone new on a waiting list.
- Registration Open?** ☒ Yes. Check yes to allow volunteers to see and sign up for this opportunity.
- Special Admin Code:** [field with a small icon]. This is the "Admin Code" seen on the volunteer registration page that

SHORT NAME	This will appear on some reports.
CONTACT EMAIL	This email is shown on the registration page after they select the clinic. This allows you to have different contact emails for each clinic.
EVENT URL	Each event may have their own description web page shown on the registration page and/or sent with the registration emails. Or this may just point to your overall website.
WAITING LIST	Will this clinic using the automated waiting list processing?
REGISTRATION OPEN	Is this clinic accepting volunteer registrations?
SPECIAL ADMIN CODE	If a volunteer enters this code on the registration page they can sign up for any assignment including assignments with a waiting list.

<b>Local Event Time</b>	May 5 2019 3:59AM ▼	This is the local time for the event -- it identifies the time zone and daylight savings time status. Used for some automated messages and for the volunteer scan in time. It should be set to the local time for the event at the time the page is displayed. Therefore if right now it is 8:15 am in Texas, the site of this clinic, then set it to 8:15 am even if your headquarters is in California.
<b>Success Text</b>	Text Successful Registration ▼	This Text Message Template is sent with a successful registration or change in registration.
<b>Success Email</b>	Email Registration or Update ▼	This Template is the email sent with a successful registration or change in registration.
<b>Success Page</b>	Successful Registration Page ▼	This Template Page is displayed as their success page after registration.
<b>Waiting List Email</b>	Email Waiting List Change (automated) ▼	This Template is an email optionally sent when their waiting list is status changed manually by the administrator.
<b>Automation Exclude?</b>	<input type="checkbox"/> Yes	If this is checked the event is excluded from "All Events" automated message rules. To build automated message rules for this event you will then need to assign them specifically to this event.
<b>Show in Mobile?</b>	<input checked="" type="checkbox"/> Yes	
<b>Patient Event</b>	2015 Pasadena Clinic ▼	If there is an event in the PaRIS patient system for this event indicate it here.

- LOCAL EVENT TIME** This sets the time zone for your event so that all the dates and times recorded show up properly.
- SUCCESS TEXT** This is the text message sent when they successfully register for a clinic or update their registration
- SUCCESS EMAIL** This is the email sent. (See the Messaging menu, templates)
- SUCCESS PAGE** When they successfully register for your clinic this is the text of the success page.
- WAITING LIST EMAIL** This is the email they are sent when their waiting list status is changed.
- AUTOMATION EXCLUDE** Most of your events will want to be part of the automation process (automatic messages, automatic waiting list process) but in some rare cases they may not.
- SHOW IN MOBILE** Should this clinic show up in your mobile data.
- PATIENT EVENT** If you are also using the PaRIS patient system from Spark this is where you specify the connect patient system.



The basic clinic record also defines the days for the clinic. An event can just be one day or any number of days.

[Home](#)
[Register](#)

[Check-In](#)
[Reports](#)
[Messaging](#)
[Admin Functions](#)
[Logoff](#)

Success Email

Email: New Reg or Update

Waiting List Email

Email: Waiting List Email

Registration Success Page

The text on the successful registration web page is updated by selecting the "Admin Functions" and the "Customize System Text" option.

This Template is the email sent when a successful registration for an event registration.

This Template is an email optionally sent when their waiting list is status changed manually by the administrator.

Scheduled Days for this Event:


Date	Type	
09/17/2017 Sun	Set Up	delete
09/18/2017 Mon	Event	delete
09/19/2017 Tue	Event	delete

Enter Date:

add date

Day Type:

Clinic




Software built by [The SPARK Team, LLC](#)

[Contact us](#) to find out more about Spark volunteer systems.

Your organization can be registering volunteers with this software at your next event!

[Privacy Notice](#)
[Terms and Conditions](#)




## Associate assignments with an event

Menu: Admin Functions → Event Assignments

Once your basic event record is defined, you will then associate assignments with that event. You may have General Volunteers assigned every day but nurses only on a single day. You can setup as many assignments as needed. This could be hundreds of different types of assignments or only a few.

[Home](#) [Register](#) [Check-In](#) [Reports](#) [Messaging](#) [Admin Functions](#) [Logoff](#)

 **Create/Edit Assignments for an Event**

Designate the assignments and parameters for the indicated volunteer event. To add an assignment to a volunteer event check the DEFINE checkbox and press the [Create Assignments] button.

Event

Sample Event

Create Assignments

export

Area

General Volunteers

Define	Area	Assignment	Public Default?	Public Days	Days	Question Sets		
<input checked="" type="checkbox"/>	Gen	Computer Support	yes	3	3	Computer Support Sample	<a href="#">edit</a>	<a href="#">delete</a>
<input checked="" type="checkbox"/>	Gen	Event Manager		0	3		<a href="#">edit</a>	<a href="#">delete</a>
<input checked="" type="checkbox"/>	Gen	General Volunteer	yes	3	3	General Volunteer Sample	<a href="#">edit</a>	<a href="#">delete</a>
<input checked="" type="checkbox"/>	Gen	Volunteer Registration	yes	3	3		<a href="#">edit</a>	<a href="#">delete</a>

"Public" assignments can be seen by volunteers who have access to the assignment without an "admin code" on the registration page. If a dentist assignment is "public" it may be seen by dentists since their profession is linked to that assignment. General volunteers cannot see the dentist assignment. Since the assignment "general volunteer" is marked available to all professions if that assignment is also marked "public" then it is seen by everyone.

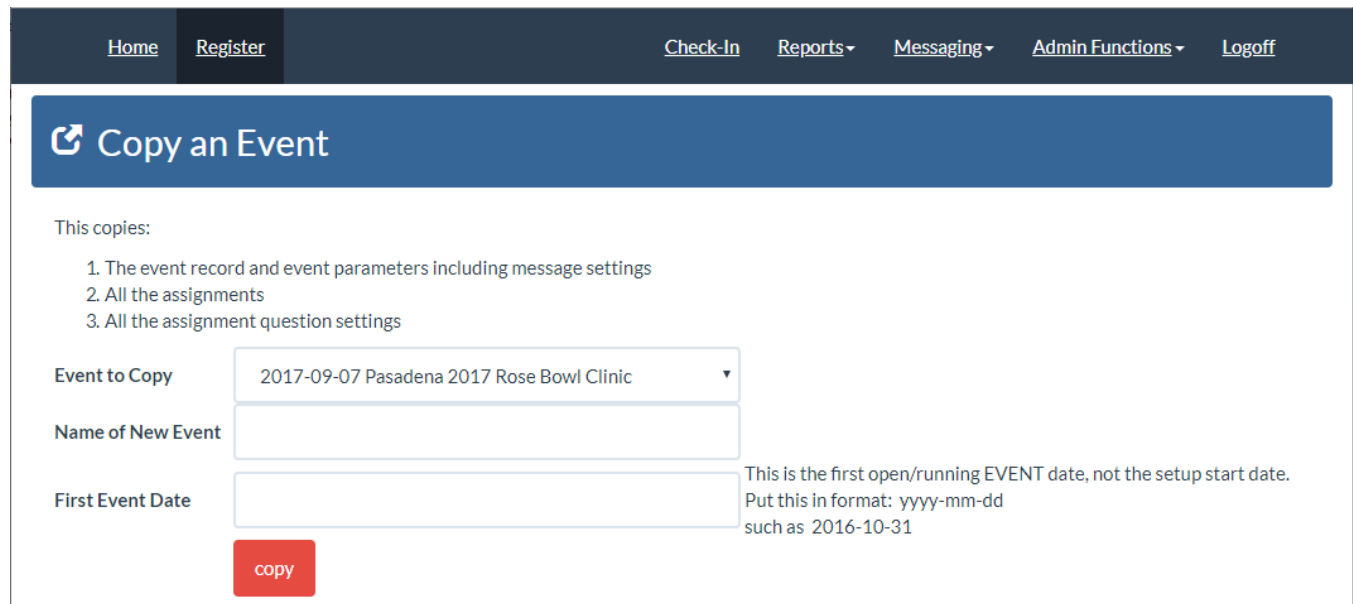
"Public" assignments can be seen by volunteers who have access to the assignment without an "admin code" on the registration page. If a dentist assignment is "public" it may be seen by dentists since their profession is linked to that assignment. General volunteers cannot see the dentist assignment. Since the assignment "general volunteer" is marked available to all professions, if that assignment is also marked "public" then it is seen by everyone.

## Faster way to create new events

If you have complex events with 50 or more types of assignments it can take a few minutes to set up a new event clicking through and making sure event assignments are setup correctly. However, after that event is created you can just COPY that event to create new similar events making the process very quick.

Important  
time saver!

To COPY and event use menu: Admin Functions → Copy Event



The screenshot shows a web application interface for copying an event. At the top is a dark navigation bar with links: Home, Register, Check-In, Reports, Messaging, Admin Functions, and Logoff. Below this is a blue header bar with a refresh icon and the text 'Copy an Event'. The main content area lists what is copied: 1. The event record and event parameters including message settings, 2. All the assignments, and 3. All the assignment question settings. There are three input fields: 'Event to Copy' (a dropdown menu showing '2017-09-07 Pasadena 2017 Rose Bowl Clinic'), 'Name of New Event' (a text box), and 'First Event Date' (a text box). To the right of the date field is a note: 'This is the first open/running EVENT date, not the setup start date. Put this in format: yyyy-mm-dd such as 2016-10-31'. A red 'copy' button is at the bottom left of the form.

This is the way you will create all your events. It is so much faster! Even if the event needs a little modification afterward this is much quicker.

**EVENT TO COPY** This is the event you will copy. All the assignments, questions, and general settings are copied.

**NAME OF NEW EVENT**

**FIRST EVENT DATE** This is the date of the first clinic day of your new event. Not the setup days. If there are setup days in the event being copied that will also be copied.

- If the event being copied has 1 setup day and 3 clinic days then that is how the new clinic will look.
- All assignments and starting times will be copied.


## Setting up assignment specific questions

Menu: Admin Functions → Questions to Assignments

You may have questions you want asked when a volunteer selects a specific assignment. If someone is a general volunteer you may want to know if they can lift 25 lbs. or if they select a dentist assignment you may want to know if they are able to bring some of their own instruments.

Previously we setup some QUESTION SETS. How we associate questions with specific assignments is using QUESTIONS TO ASSIGNMENTS.

[Home](#) [Register](#) [Check-In](#) [Reports](#) [Messaging](#) [Admin Functions](#) [Logoff](#)

 Associate Question Sets with Event Assignments

Select the Assignments for this Question Set. First select the Question Set, then the event, then just the JOIN checkbox to indicate which assignments should be associated with this Question Set. After selecting, or unselecting, the JOIN checkboxes click the [Save Changes] button.

Question Set

Computer Support Sample :: These questions will be assoc

save changes

export

Event

Sample Event

Assign	Area	Assignment	Public Default?	Other Question Sets
<input checked="" type="checkbox"/>	General Volunteers	Computer Support	yes	
<input type="checkbox"/>	General Volunteers	Event Manager		
<input type="checkbox"/>	General Volunteers	General Volunteer	yes	General Volunteer Sample
<input type="checkbox"/>	General Volunteers	Volunteer Registration	yes	

Above you can see we have selected the “Computer Support Sample” question set and the event “Sample event”. Just check the box under ASSIGN next to the assignments which should have these questions.

Multiple assignments may have the same questions.

## Cutting off registration

Sometimes you may have an event where you need to be able to verify medical licenses or do some specific kinds of background checks on volunteers before they register. If so, you may want to cut off the registration a few days before their reporting date. This is done with the events "Registration Cut Off" setting available separately with each event.

Registration Open?	<input checked="" type="checkbox"/> Yes	Check yes to allow volunteers to see and sign up for this opportunity
Registration Cut Off	2 days before assignment at ▼	When do we cut off registrations for daily assignments? If you need lead time to verify licenses or do background checks then you may need to set this parameter to give yourself some time. This parameter is applied by day, not to the first day of an event. Therefore if you have an event that is Monday through Friday and you set this parameter to "2 days before", on Wednesday volunteers can still sign up for assignments on Friday but not on Thursday. The use of the Special Admin Code bypasses this check. When VoRIS admins register or edit a volunteer it also bypasses this check.

This setting allows you to specify the number of days before an assignment starts when the system will not allow volunteers to register. This parameter is applied by day, not to the first day of an event. Therefore if you have an event that is Monday through Friday and you set this parameter to "2 days before", on Wednesday volunteers can still sign up for assignments on Friday but not on Thursday. The use of the Special Admin Code bypasses this check. When VoRIS admins register or edit a volunteer it also bypasses this check.

To the volunteers the registration page will look like the following:

Day	Type	Assignment
Sat Apr 4	Clinic	Registration is closed for this date
Sun Apr 5	Clinic	Registration is closed for this date
Mon Apr 6	Clinic	Registration is closed for this date
Tue Apr 7	Clinic	Registration is closed for this date
Wed Apr 8	Clinic	Not attending this day ▼
Thu Apr 9	Clinic	Not attending this day ▼
Fri Apr 10	Clinic	Not attending this day ▼

If you give a volunteer the event "Admin Code" then they can still see and register on the hidden dates. And when administrators are logged on they will also NOT have the dates hidden so they can still sign up anyone anytime.

## Bulk Changes

Menu: Admin Functions → Questions to Assignments

Another big time saver is the BULK CHANGES feature.

Important  
time saver!

The screenshot shows a web application interface for making bulk changes to assignments. At the top is a navigation bar with links: Home, Register, Check-In, Reports, Messaging, Admin Functions, and Logoff. Below the navigation bar is a large blue header with a white arrow icon and the text 'Make Bulk Changes to Assignments'. The main content area contains several form fields: 'Event:' with a dropdown menu showing '2017 Rose Bowl Clinic'; 'Event Date:' with a dropdown menu showing '\* All Days \*'; 'Field to Change:' with a dropdown menu showing 'Start Time (format: 07:30 or 15:00)'; and 'New Value:' with a text input field containing '07:30' and a 'select all' button. To the right of these fields is a red 'make changes' button. Below the form fields is a table with three columns of assignment items, each with a checkbox and a description. The table is scrollable.

<input type="checkbox"/> (D) ADCF Staff (0)	<input checked="" type="checkbox"/> (G) Interpreter (Mandarin) - 1st Shift (17)	<input checked="" type="checkbox"/> (M) Lab Director Shadow (0)
<input checked="" type="checkbox"/> (D) Dental Assisting (87)	<input checked="" type="checkbox"/> (G) Interpreter (Mandarin) - 2nd Shift (11)	<input checked="" type="checkbox"/> (M) Mammography Lead (7)
<input checked="" type="checkbox"/> (D) Dental Assisting - CEREC Crowns (1)	<input checked="" type="checkbox"/> (G) Interpreter (Other Lang) - 1st Shift (13)	<input type="checkbox"/> (M) Massage Therapy - Traditional Types for Volunteers (2)
<input checked="" type="checkbox"/> (D) Dental Assisting Expanded Function (1)	<input checked="" type="checkbox"/> (G) Interpreter (Other Lang) - 2nd Shift (12)	<input type="checkbox"/> (M) Medical Director (10)
<input checked="" type="checkbox"/> (D) Dental Director (12)	<input checked="" type="checkbox"/> (G) Interpreter (Spanish) (0)	<input type="checkbox"/> (M) Medical Director Shadow (0)
<input type="checkbox"/> (D) Dental Director Shadow (0)	<input checked="" type="checkbox"/> (G) Interpreter (Spanish) - 1st Shift (31)	<input type="checkbox"/> (M) Medical Instruments & Supplies (9)
<input type="checkbox"/> (D) Dental Equipment Tech (0)	<input type="checkbox"/> (G) Interpreter (Spanish) - 2nd Shift (33)	<input type="checkbox"/> (M) Medical Instruments & Supplies Lead (6)
<input type="checkbox"/> (D) Dental Equipment Tech AM (0)	<input type="checkbox"/> (G) Interpreter (Spanish) - Early AM Patient Line (0)	<input checked="" type="checkbox"/> (M) Medical Lab - KP Staff (1)
<input type="checkbox"/> (D) Dental Equipment Tech Lead (13)	<input type="checkbox"/> (G) Interpreter (Vietnamese) (0)	<input type="checkbox"/> (M) Medical Lab - Phlebotomist (3)
<input type="checkbox"/> (D) Dental Equipment Tech PM (0)	<input type="checkbox"/> (G) Interpreter (Vietnamese) - 1st Shift (0)	<input type="checkbox"/> (M) Medical Lab - Tech (1)
<input type="checkbox"/> (D) Dental Floor Manager (7)	<input type="checkbox"/> (G) Interpreter (Vietnamese) - 2nd Shift (9)	<input type="checkbox"/> (M) Medical Triage (72)

This page allows you to select an event, select a date, select an assignment, and then select a field to change. This allows you to update all the starting times for selected events all at once or change the ending times or the volunteers needed for the assignment.

## Adding images and files to your VoRIS system

You may add images, for website logos and to include in messages, and also add files to be sent with your messages. These items are stored in the VoRIS cloud as individually encrypted files only accessible by your system.


The following formats are supported.

- Adobe Acrobat PDF files (preferred format)
- Microsoft Word files
- Microsoft Excel files
- JPG images
- GIF images
- PNG images

If you are uploading a file we suggest you avoid the use of Word or Excel files. These run the risk of a volunteer's email system marking the email as SPAM or blocking opening of the file. PDF files are the safest.

To upload your image or file go to menu **Admin Functions → Your images and files**

Click the [Add New] button at the top.

 **Adding an image or file to the System**

**Name:**

This is the name of this item in VoRIS. This name will be used in your messages to refer to this file. This is not the name of the file on your PC before you upload it.

**File Use:**

▼

To use logo images select the "file use" as one of the logo types and then in the Customer Setup page select one of these images to use on your web pages.

**Image Resizing:**

▼

Images will be resized to be no more than this width and height. For logo images the resizing is fixed. If you are uploading just a file (PDF, Word, Excel...) then there is no resizing.

**Image/File:**

Type in the VoRIS name for the image or file. This is not the file name on your hard drive but rather the name you will know this file by in your VoRIS cloud storage. You will use this name in the message tags.

Notice if you select the file type to be a General Image you will then have Image Resizing options. Therefore you do not need to size the image with some other tool before you upload it.

Press [Add] to upload and add it to your VoRIS cloud storage.

## Messaging

VoRIS contains a variety of messaging options. Some of the options allow sending either text messages or emails. If you send emails you will need to build an email template first. These templates can contain a wide variety of substitutable tokens to personalize the messages for each volunteer.

### *Your from email address*

When you sign up for VoRIS we will setup a FROM email address for your account. This is usually an email address you are already using to communicate with your volunteers. This might be:

[volunteers@dentalassociation.org](mailto:volunteers@dentalassociation.org)

[volunteers@HealthFoundation.org](mailto:volunteers@HealthFoundation.org)

You will decide the email address to use and provide it to us when we are building your system. While you can't change this yourself you may send Spark a new email address at anytime.

### *Your from texting phone number*

When you sign up for VoRIS you may optionally sign up for text messaging. Your account will be setup with a texting phone number which only your organization uses. This allows volunteers to text you back and get questions answered if you wish to support that option.

When you sign up you will provide an area code and prefix and a texting number in that area will be setup for use with your system.



## Message email templates

To send emails the text and formatting of the email will need to be setup ahead of time. You may setup any number of email templates. You may setup an email template to be used once or setup an email to be used over and over with automation.

[Home](#)
[Register](#)
[Check-In](#)
[Reports](#)
[Messaging](#)
[Admin Functions](#)
[Logoff](#)

Build and Test Message Templates

Template Type: Email Templates ☐ Show Inactive?
 add template
export

	Template Name	Type	Description	SYS	Automation Rule	Last Sent	Msgs Sent	Template #	
<span>Edit</span>	Dental Welcome Test	Email	Welcome and orientation email to dental volunteers		Dental Orientation	4/2/2019	693	15	<span>Make Inactive</span>
<span>Edit</span>	Email Last Minute Reminder	Email	A last minute (e.g. 1 week to go) reminder for all volunteers about their schedule and to read orientation materials.			10/15/2017	2,761	24	<span>Make Inactive</span>
<span>Edit</span>	Email Registration or Update	Email	This is the email sent with their registration.	SYS		1/2/2019	7,032	4	<span>Make Inactive</span>
<span>Edit</span>	Email Schedule Reminder	Email	Email to remind people of their scheduled events and assignments			9/28/2015	1,501	14	<span>Make Inactive</span>
<span>Edit</span>	Email Waiting List Change (automated)	Email	This is sent when a volunteer has an AUTOMATED change in their waiting list status.	SYS		5/5/2016	297	12	<span>Make Inactive</span>
<span>Edit</span>	General Support Welcome	Email	General Support welcome and orientation email		test 2	12/10/2017	1,125	18	<span>Make Inactive</span>
<span>Edit</span>	Password Recovery Email	Email	This is the email sent for password recovery.	SYS		5/7/2017	237	6	<span>Make Inactive</span>
<span>Edit</span>	Reminder about TOMORROW's Assignment Email	Email	Send the email about the next days assignment.		Reminder of Start Time	3/5/2016	7	21	<span>Make Inactive</span>

**AUTOMATION RULE** If this email template is used with automation then the rule is highlighted here. See message automation documented later in this document.

**LAST SENT** When was this message last sent.

**MSGs SENT** How many emails have been sent with this template?

## Including images in your emails

Including images is now very easy using VoRIS tags in the text of your messages.

The image below shows the email template setup page. The first line in the email text shows how to insert a VoRIS image into your emails using the “%% image” tag and the image name. It is that simple.

The screenshot shows the 'Edit Message Template' interface. The 'Item Name' is 'Dental Welcome'. The 'Type' is 'Email'. The 'Description' is 'Welcome and orientation email to dental volunteers'. The 'Test with Volunteer' is 'ANSTON2, KADIE /Dentist - General'. The 'Test with Event' is 'Pasadena 2017 Rose Bowl Clinic'. A red circle highlights the text '%% Image Clinic Email Banner 2018 %%' in the 'Test with Event' field. A green callout box points to this text with the instruction: 'Include the VoRIS tag in the text of the message where you want the picture.'

Notice the tag format is the text “%% image” plus the name you have given to your image in VoRIS. Followed by “%%”. Example:

%%image **dental volunteers** %%

%%image **2019 Denver Clinic waiting line** %%

You may include any number of images in your emails. You might have a monthly email that includes a number of interesting images from your clinics.

See the section in this document on the message tags available with this system.

## Including files in your messages

You may also include files with your messages to your volunteers. This is done by first uploading the file into the VoRIS cloud storage and then including the %%FILE tag in your messages.


The first step is to upload the file into the VoRIS cloud. The following formats are supported.

- Adobe Acrobat PDF files (preferred format)
- Microsoft Word files
- Microsoft Excel files

If you use Word or Excel files you run the risk of a volunteer's email system marking the document as SPAM or blocking opening of the file. PDF files are the safest.

To upload your file go to menu **Admin Functions** → **Your images and files**

Click the [Add New] button at the top.

 **Adding an image or file to the System**

**Name:**

Parking instructions

**File Use:**

File

**Image Resizing:**

Keep Original Size - width:2000px, height:2000px

**Image/File:**

D:\Trash\Parking Instructions.pdf

Browse...

Add

This is the name of this item in VoRIS. This name will be used in your messages to refer to this file. This is not the name of the file on your PC before you upload it.

To use logo images select the "file use" as one of the logo types and then in the Customer Setup page select one of these images to use on your web pages.

Images will be resized to be no more than this width and height. For logo images the resizing is fixed. If you are uploading just a file (PDF, Word, Excel...) then there is no resizing.

Type in the VoRIS name of the file. This is not the file name on your hard drive but rather the name you will know this file by in your VoRIS cloud storage. You will use this name in the message tags.


File Use should be set to FILE.

Image Resizing is disabled.

Image/File – use the [Browse] button to locate your file.

Press [Add] to upload and add it to your VoRIS cloud storage.




The uploaded file will then appear in your image/files list.



## Your Images & Files

Sort, Add, Delete Images and Files

Add New

	Image/File Name	Type	Width	Height	Size K	Logo	DateAdded	Added By	
<a href="#">View</a>	PARKING INSTRUCTIONS	Adobe PDF	0px	0px	147K	<input type="checkbox"/>	2/26/2020 4:16:43 PM	MIKEW	<a href="#">Delete</a>
<a href="#">View</a>	CLINIC EMAIL BANNER 7	 image/png	760px	285px	49K	<input type="checkbox"/>	12/4/2018 12:57:39 PM	MIKEW	<a href="#">Delete</a>
<a href="#">View</a>	SPARK LOGON LOGO	 image/gif	93px	65px	3K	<input checked="" type="checkbox"/>	12/3/2018 2:30:40 PM	MIKEW	<a href="#">Delete</a>
<a href="#">View</a>	SPARK REGISTRATION LOGO	 image/gif	150px	63px	3K	<input checked="" type="checkbox"/>	12/3/2018 2:27:35 PM	MIKEW	<a href="#">Delete</a>

You may now include this file as a link in your messages by using the VoRIS message tag “%%File”. These tags are included in the text of your messages.

Example:

Dear volunteer,

Thank you for volunteering for our Olympia, Washington clinic this weekend. Click the following link to see the parking instructions. %%File [Parking Instructions](#) %%

Thank you

## Message Tags for customizing volunteer messaging

VoRIS supports over 50 “tags” that allow you to insert information specifically for the volunteer receiving the message. You can insert their name, their assignments and starting times, their t-shirt size, languages, their volunteer barcode or QR code, and many other pieces of information. Below is a list of these tags.

### Inserting Data Token Tags from Volunteer's Registration Data

The system has the following variables which may be substituted into emails, text messages, and badges, not the registration page. To use them you must surround it by double %% characters. (case doesn't matter)

Examples:

%%FirstName%%

%%School%%

%%Email%%

%%EventAddress%%

The following variables may be used with this "%%" syntax. Notice there are no blanks in the token names.

%%VolKey%%      The unique volunteer number. Prefix with the letter V to print bar codes for volunteer name labels.

%%FirstName%%    This displays the first name in proper case format. For example Mike and Kathy.

%%FirstNameCase%%    This displays the first name in upper case format. For example MIKE and KATHY.

%%LastName%%    This displays the first name in proper case format. For example Whaley, Smith.

%%LastNameCase%%    This displays the names in all upper case.

%%Title%%        Name fields for volunteer.

%%ProfAbrv%%     Professional abbreviation such as RN, DDS, MD, etc...

Address1

Address2

City

Zipcode

StateName        Volunteer's address

Phone

UserName        The logon name the user specified. It may be their email address.

BadgeName       The name the volunteer requested for their badge.

TShirtSize       Small, Medium, Large, ...

Languages	The list of languages the volunteer claimed on their registration.
Residency	0 = no, 1 = yes
HealthCareStudent	0 = no, 1 = yes
School	If they are a healthcare student this contains the school name.
FacultySupervisor	The name of their faculty supervisor if they are a student and plan to operate at your clinic as a medical student.
SignatureDate	The date they signed the registration record.

#### ***Other volunteer registration data***

FirstAdded	The date they first registered.
LastUpdated	The date they last updated their registration record.
CompanyMatch	Yes or No if their company provides a company match donation of some kind when they volunteer.
CompanyMatchProgram	The description of the company match program.
CompanyName	This is the name of the volunteer's company if they specified a company match.
EmergencyName	Their emergency contact name.
EmergencyPhone	Their emergency phone number.
License	If their profession requires a license this is their license number.
LicenseComment	They may have entered a comment with their license number.
LicenseStateName	The state of their license.
LicenseDate	The date their license expires.
EventNameShort	The short name for the event for this email.

#### ***Event specific tags***

EventNameFull	The full name for the event for this email.
EventAddress	The physical address of this event.
EventURL	The URL for more information about this event.

### **Inserting the volunteers assignments for a specific event**

There is a special substitution value called

%%ASSIGNMENTS%%

This inserts the volunteers assignments into the email if an event has been selected. Only assignments at the selected event.

### Inserting all future assignments for a volunteer

There is a special substitution value called

%%ALLASSIGNMENTS%%

This inserts all their future volunteer assignments into the text. If they are signed up for two future events then a separate table for each will be inserted into the text. This will be followed by the QUESTIONS for those assignments so a separate questions token is not required when you use All Assignments.

### Adding a volunteers assignment answers to their email

Volunteers may be asked any number of questions associated with their assignments. If they are a general volunteer they may be asked if they can lift 25 lbs. If they are a dentist they may be asked if they are bringing an assistant. This questions tag includes these questions and answers in their email. This is often used in the response email to their registration.

%%QUESTIONS%%

This will insert a table of all their question answers for the questions associated with their assignments.

### Get all the events open for registration

This token is to help you with volunteer outreach. Include this token to insert a table into your email of all of your events which are currently open for registration. It skips events marked "Automation Exclude" in the event record.

%%OpenEventList%%

### Create the volunteer barcode in their email

This token may be inserted into an email to generate the volunteer 1D barcode. Include this in an email to allow your volunteers to the email and barcode and bring it in to speed up the first day of volunteer check in processing.

%%Barcode%%

### Create the volunteer QR code in their email

This token may be inserted into an email to generate the volunteer 2D barcode. Include this in an email to allow your volunteers to the email and barcode and bring it in to speed up the first day of volunteer check in processing. This requires a barcode scanner capable of reading 2 dimensional bar codes like QR codes. This type of barcode may be more forgiving when resized like on a phone screen.

%%QRCode%%

## Direct volunteers to register for more events – giving them their RECALL link

This token is to help when you are emailing about volunteers registering for additional events or making changes. This will insert a link into your email for the volunteer RECALL page with a parameter for the volunteer's user name. This way they don't need to remember to click RECALL on the registration page, and they don't need to remember their user name. This may help prevent duplicate registrations.

%%RecallPageLink%%

## Special Tokens for including specific assignments in messages

%%GetDate(10/23/15)%%

This inserts the date "10/23/15" into the text. Just to follow the pattern of this section of tokens.

%%GetAssignName(10/23/15)%%

This will insert the assignment name for 10/23/15 into the text at this point. It will not insert a waiting list assignment. If there is an alternate it will insert the alternate. It will substitute \*none\* if there is no assignment that day so it should only be used with a query that makes sure there is an assignment.

GetAssignName(Tomorrow)

GetAssignName(Today)

%%GetStartTime(10/23/15)%%

This will insert their starting time on the specified day. It will not insert a waiting list assignment. If there is an alternate it will insert the alternate. It will substitute \*none\* if there is no assignment that day so it should only be used with a query that makes sure there is an assignment.

GetStartTime(Tomorrow)

GetStartTime(Today)

%%DayName(10/23/15)%%

For inserting the day of week name.... but mostly useful with TOMORROW and TODAY used as the date.

DayName(Tomorrow)

DayName(Today)

## Special Tokens for Patient Data from PaRIS

%%PatientsToday%% This will substitute the number of registered (not served) patients today if there is a connected PaRIS clinic.

%%PatientsTotal%% This will substitute the total number of registered patients in the connected clinic.



%%PatientValueToday%% This will substitute the total value of patient services recorded today.

%%PatientValueTotal%% This will substitute the total value of patient services in the connected clinic for all days.

### Including VoRIS customer loaded images in your emails

You may include any of the images you have uploaded into VSpark in your emails. Use the following syntax:

%%IMAGE your image name /center %%

It starts with "%%IMAGE", then the exact name you have given to your image in the VoRIS system, then the optional alignment specification, then "%%". The alignment may be /RIGHT or /LEFT or /CENTER and is optional.

Example: If your image name is "Happy Volunteers"

use: %%IMAGE happy volunteers %%

or: %%image HAPPY VOLUNTEERS /Right %%

### Including links to VoRIS cloud files in your emails

You may need to send out parking instructions or out-of-state sign up documents or floor plans to help volunteers navigate your clinics. When you need to do this you may upload the file into VoRIS (see menu Admin Functions --> Your Images & Files) and then include a link to the files in your messages using the following. Check the section of this document titled "including files in your messages" to learn more about uploading your files to include them in emails.

syntax:

%%FILE your VoRIS file name %%

%%FILE Parking Instructions Pasadena Clinic %%

It starts with "%%FILE", then the exact name you have given to your file in the VoRIS system.

Example: If your file name is "Feedback Form"

use: %%FILE Feedback Form %% in your email text.

### Inserting HTML Tags in your messages

You are able to format the text by directly inserting HTML tags into emails, badges and Text Pieces, not text messages, by using "<%>" instead of "<" and ">". Obviously this is VERY dangerous if you don't know what you are doing! Ask Mike for the HTML tags to modify the text if you are not familiar with HTML. Email is extremely limited in the HTML it will support. In fact some HTML will work in a few email systems and not others!

Common things:

<%i%>italics<%i%>

`<%b%>bold<%/b%>`

`<%h4%>larger text<%/h4%>`

`<%small%>smaller text<%/small%>`

To get a numbered list use:

`<%ol%> <%li>numbered list item one<%/li%>`

`<%li>numbered list item one<%/li%>`

`<%/ol%>`

To get a bulleted list use:

`<%ul%>`

`<%li>numbered list item one<%/li%>`

`<%li>numbered list item one<%/li%>`

`<%/ul%>`

To include a link to a file in an email or text message

include the following:

`<%a href='http://www.cdafoundation.org/files/MedicalTriage.pdf' %>click here for file<%/a%>`

## Testing your message formatting

Once you have setup your email or text message templates testing them for proper formatting is quick and easy. Do the following:

1. Open the message template
2. Select a test event
3. Select a "test with volunteer" -- their data will be used in the test but the message will not be sent to them.
4. Fill in the SEND TEST TO EMAIL with your email address.
5. Click [Test]

An email will be generated, substituting all the tags you have included, and it will be sent to your email address. This allows you to test your message before sending it.

**Edit Message Template**

Template Name	Dental Welcome Test	save
Type	Email	<input checked="" type="checkbox"/> Active
Description	Welcome and orientation email to dental volunteers	
Test with Volunteer	ANSTON, BETTY /General Support	Just to help you remember where this is used
Test with Event	Pasadena Clinic 2015	
	Send Test to Email: mikew@thesparktear	test
	<%img src="http://volunteers.TheSparkTeam.org/images/ClinicImages2.jpg" height="215" width="760" /%><br%>Dear Mr. Whaley, Our clinic is fast approaching, but there is much for the us to do in the next month. You will be hearing from us periodically with reminders and updates. Right now we could use your help in encouraging your friends, staff,	

## *Volunteers may opt out of emails and text messages*

Volunteers may opt out of any of your messaging at anytime. For emails there is a link at the bottom of each email which allows them to stop the emails. This link looks like the following:

To remove yourself from volunteer system emails [click here](#).

For text messages the volunteer just needs to respond with "stop" to turn off text messaging.

## *Problem emails – bounces and complaints (SPAM)*

When an email is sent to a bad email address with a “permanent” bounce then that volunteer has their status changed to “Stop Email”. If an email address continues to send to bad email addresses your emails may be blocked or marked as SPAM. By stopping emails to these bad addresses your sending address stays clean and usable.

Reasons for a permanent bounce:

1. The email address is invalid. For example `mike@yahoo.com`
2. The domain does not exist. For example [mike@yahoo2.com](mailto:mike@yahoo2.com)
3. The email mailbox doesn't exist. For example [mikemike@yahoo.com](mailto:mikemike@yahoo.com)

If the bounce is “transient” then the volunteer’s status is not changed to “Stop Email”.

1. The volunteer’s email box is full.
2. The receiving email server is down.

If the volunteer does not want the email they may mark it as “SPAM” on their local email program. When they do that most email programs will then report that back to the sending email system as a “complaint”. If complaints are ignored then the major email vendors may begin to block your emails. For this reason if a complaint is forwarded to our email server we change that volunteer’s status to “Stop Email”.

## *Sending Bulk Messages*

Much of your time will be spent communicating with your volunteers. The first step in messaging is to create the wording for your appointment reminder messages using [messaging templates](#). In the messaging section see the topic on email templates.

Messages may be customized with message template tokens to include all kinds of information about the volunteer and their assignment. You may also include images and links to files.

Menu: **Messaging → Email Templates**

Edit the template named "Reminder about assignment". We have included a sample which may be fine for your events.

Menu **Messaging → Texting Templates** (if you are using text messaging)

"Reminder about assignment" is the name of the texting template.

Once you have created your message templates the following pages describe how you may send these messages to a variety of sets of volunteers.


## Sending bulk messages by assignment

This page allows you to select an event and then send messages to a subset of your volunteers by selecting the assignments. The number in ( ) shows the number of volunteers who have selected that assignment.

If you select “\* All Days\*” a single volunteer may show up in the counts for two different assignments. However, they will receive the message only once.

Menu: **Messaging → Bulk by Assignment**

[Home](#) [Register](#) [Check-In](#) [Reports](#) [Messaging](#) [Admin Functions](#) [Logoff](#)

 **Send Bulk Messages by Assignment**  
Inventory: Text messages remaining: 281

Event: 2017 Rose Bowl Clinic

Event Day: Wed 2017-10-25 ☐ Only Checked In? [select all](#)

☒ Text Message ☐ Email

Text Msg to Send: Since it looks to be raining tomorrow everyone can park on the north side of the building in the covered parking. We are looking forward to seeing everyone! Thanks again for volunteering.

[send msgs](#)

You may use all the message substitution tokens to personalize the message.

Only assignments with volunteers will show up in the list of assignments below. The ( ) value shown is the number of volunteers signed up for that assignment type.

<input checked="" type="checkbox"/> (D) Dental Director (2)	<input checked="" type="checkbox"/> (G) Interpreter Lead (3)	<input checked="" type="checkbox"/> (M) Mammography Lead (1)
<input checked="" type="checkbox"/> (D) Dental Equipment Tech Lead (2)	<input checked="" type="checkbox"/> (G) IT Lead (1)	<input checked="" type="checkbox"/> (M) Medical Director (2)
<input checked="" type="checkbox"/> (D) Dental Floor Manager (1)	<input checked="" type="checkbox"/> (G) IT Support (3)	<input checked="" type="checkbox"/> (M) Medical Instruments & Supplies Lead (1)
<input checked="" type="checkbox"/> (D) Dental Hygiene Lead (2)	<input checked="" type="checkbox"/> (G) Logistics Director (1)	<input checked="" type="checkbox"/> (M) Medical Triage Lead (2)
<input checked="" type="checkbox"/> (D) Dental Sterilization Lead (4)	<input checked="" type="checkbox"/> (G) Logistics Director Shadow (1)	<input checked="" type="checkbox"/> (M) Mental/Behavioral Health Lead (1)
<input checked="" type="checkbox"/> (D) Dental Sterilization Manager (2)	<input checked="" type="checkbox"/> (G) Medical Escort & Waiting Areas Lead (3)	<input checked="" type="checkbox"/> (M) Nutrition Lead (2)
<input checked="" type="checkbox"/> (D) Dental X-Ray (Panorex & Nomad) (1)	<input checked="" type="checkbox"/> (G) Medical Exit Lead (2)	<input checked="" type="checkbox"/> (M) Patient Intake Lead (2)
<input checked="" type="checkbox"/> (D) Dental X-Ray Computer Station (5)	<input checked="" type="checkbox"/> (G) Patient Entrance Lead (1)	<input checked="" type="checkbox"/> (M) Pharmacy Lead (1)
<input checked="" type="checkbox"/> (D) Dental X-Ray Lead (1)	<input checked="" type="checkbox"/> (G) Patient Exit Lead (2)	<input checked="" type="checkbox"/> (M) Physical Therapy Lead (1)
<input checked="" type="checkbox"/> (D) Dentist - CEREC Crowns Lead (1)	<input checked="" type="checkbox"/> (G) Patient Line Manager Day Shift (1)	<input checked="" type="checkbox"/> (M) Primary Care Director (1)

## Sending bulk messages by volunteer profession

This method allows you to send messages to a list of volunteers by selecting the event, the day of the event, and the professions of the volunteers. You may send either text messages or emails. If you are sending text messages you may just type in the message, you do not need a text message template.

You may also select a single event or select “\* All Database Volunteers \*” to select all the volunteers in your database by profession.

Menu: **Messaging → Bulk by Profession**

The screenshot shows a web application interface for sending bulk messages. At the top is a navigation bar with links: Home, Register, Check-In, Reports, Messaging, Admin Functions, and Logoff. Below this is a blue header with a white arrow icon and the title 'Send Bulk Messages by Volunteer Profession'. The main form area includes: an 'Event:' dropdown menu set to '\* All database volunteers \*' with a tooltip explaining that this selects all volunteers; an 'Event Day:' dropdown set to '\* All Days \*' with a 'select all' button; radio buttons for 'Text Message' (selected) and 'Email'; a 'Text Msg to Send' text area with a tooltip about message substitution tokens; and a red 'send msgs' button. Below the form is a green banner with instructions: 'Only professions with volunteers will show up in the list of professions below. The ( ) value shown is the number of volunteers signed up with that profession.' This is followed by a table of professions with checkboxes and counts.

<input type="checkbox"/> (D) Dental Assistant (215)	<input type="checkbox"/> (M) Chiropractor (23)	<input type="checkbox"/> (M) Registered Nurse (328)
<input type="checkbox"/> (D) Dental Assisting Student (25)	<input type="checkbox"/> (M) Dietician/Nutritionist (8)	<input type="checkbox"/> (M) Technologist - EKG/ECG (1)
<input type="checkbox"/> (D) Dental Equipment Technician (21)	<input type="checkbox"/> (M) Emergency Medical Technician (18)	<input type="checkbox"/> (M) Technologist - Mammography (7)
<input type="checkbox"/> (D) Dental Hygiene Student (67)	<input type="checkbox"/> (M) Licensed Practical Nurse/Licensed Vocational Nurse (17)	<input type="checkbox"/> (M) Technologist - Radiology/X-Ray (9)
<input type="checkbox"/> (D) Dental Hygienist (172)	<input type="checkbox"/> (M) Massage Therapist (4)	<input type="checkbox"/> (M) Technologist - Ultrasound (11)
<input type="checkbox"/> (D) Dental Lab Technician (12)	<input type="checkbox"/> (M) Medical Assistant (44)	<input type="checkbox"/> (M) Veterinarian (2)

Only the professions signed up for your clinic will be shown in the list. The number (ooo) next to each profession is the number of volunteers with that profession who will get your message.



## Sending bulk messages using complex rules

Sometimes you need to send bulk messages using complex rules. Examples

- Send a message to all registered dentists who have not yet signed up for the Los Angeles clinic but live in California.
- Send a message to all out of state nurses registered for the Denver clinic.
- Send a message to all general volunteers about the Rules of Conduct if they have not already received the message in the last year.

Bulk message queries are setup by Spark. If you have a requirement for a special bulk message query just email Spark at [support@TheSparkTeam.org](mailto:support@TheSparkTeam.org) with the requirements. We will be able to setup the special query in a few days at no charge.

[Home](#) [Register](#) [Check-In](#) [Reports](#) [Messaging](#) [Admin Functions](#) [Logoff](#)

### Queries Available for Bulk Messaging

Contact The Spark Team to have additional queries created for your messages. [add query](#)

	Query Name	Query #	Description	Updated
<a href="#">View</a>	ALL Volunteers in DB	17	ALL volunteers in the database who do not have the REGISTRATION FLAG checkbox set on in the Admin page for the volunteer. This is NOT limited by their registering for any event.	6/1/2017 2:28:57 PM
<a href="#">View</a>	Area Dental	9	All volunteers with a clinic DENTAL assignment (not waiting list)	3/7/2016 12:45:21 PM
<a href="#">View</a>	Area General Volunteers	12	All volunteers with a clinic GENERAL assignment (not waiting list) for the selected event.	3/7/2016 12:45:55 PM
<a href="#">View</a>	Area Vision	11	All volunteers with a clinic VISION assignment (not waiting list)	3/7/2016 12:45:37 PM
<a href="#">View</a>	Assigned Tomorrow	14	Get volunteers assigned TOMORROW, not wait listed. Used to send the reminder for tomorrow's starting time.	3/7/2016 12:46:15 PM

Select the query to send a message directly with a query. You will see the page below.

[Home](#)
[Register](#)
[Check-In](#)
[Reports](#)
[Messaging](#)
[Admin Functions](#)
[Logout](#)

## Send Bulk Messages with Query

Query Name
Area Dental

Query Description
All volunteers with a clinic DENTAL assignment (not waiting list)

Event:
Pasadena Clinic 2015

Subject Line for Emails
Spark Team Test System

Send Message
Email: Dental Welcome Test #15

display results

export results

send msgs

Page 1 of 11

	Name	Area	Profession	Event	Assignments
<a href="#">edit</a>	ANSTON1811, BELLA	D	Dentist - General	Pasa 2015	Dentist - Restorative
<a href="#">edit</a>	ANSTON1888, BEATRICE	D	Dental Assistant	Pasa 2015	Dental Assistant
<a href="#">edit</a>	ANSTON2418, BECKY	D	Dental Assistant	Pasa	Dental Assistant

**[DISPLAY RESULTS]** This button executes the query so that you may see the volunteers that would receive the message. This helps verify the query is working as you think it should.

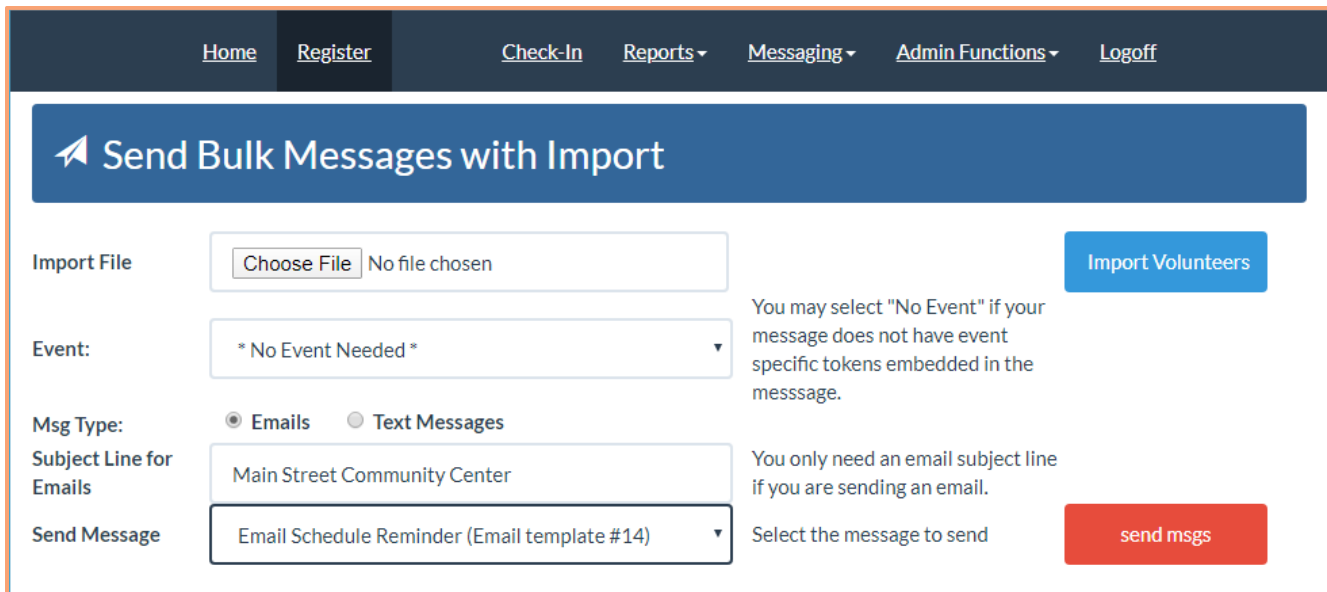
**[EXPORT RESULTS]** This button exports the list of volunteers in CSV format. You may want to create a report with the list. Or you may want to edit the list and use the BULK MESSAGE IMPORTS option (see the Messaging menu) to send to an edited list.

**[SEND MSGS]** This button sends the messages. For emails the messages are put into a queue and sent in the next few minutes. See the BULK MESSAGE HISTORY menu option under MESSAGING to see the progress.

## Sending bulk messages using an import of volunteers

VoRIS allows dozens of ways to export lists of volunteers. Almost every report also allows the data to be exported. If you have a specialized list of volunteers, or need to export a list of volunteers and then add/remove a few names, you may create a volunteer list in a file and then import that list to send the selected messages.

Menu: Messaging → Bulk Message Imports



The screenshot shows a web interface for sending bulk messages. At the top is a navigation bar with links: Home, Register, Check-In, Reports, Messaging, Admin Functions, and Logoff. Below this is a blue header with a white arrow icon and the text 'Send Bulk Messages with Import'. The main form area contains several fields: 'Import File' with a 'Choose File' button and 'No file chosen' text; 'Event:' with a dropdown menu showing '\* No Event Needed \*'; 'Msg Type:' with radio buttons for 'Emails' (selected) and 'Text Messages'; 'Subject Line for Emails' with a text input containing 'Main Street Community Center'; and 'Send Message' with a dropdown menu showing 'Email Schedule Reminder (Email template #14)'. To the right of these fields are two text boxes: one explaining that 'No Event' can be selected if no event tokens are embedded, and another explaining that only an email subject line is needed. There are two buttons: a blue 'Import Volunteers' button and a red 'send msgs' button.

Choose the file of volunteers and click the [Import Volunteers] button.

Select the event/clinic, type in the subject line for the emails (if you select a text message to send the subject line is ignored), and then select the message template to send.

### Details about the format for the imported files

With this page you may import files of volunteers to send bulk messages. This allows you to export and maintain specialized lists of volunteers and then add/remove individual volunteers to get the exact list you need. The system allows the import of **TAB delimited \*.txt files**. If you have CSV files (comma delimited) or XLS files (Excel pre 2007) or XLSX files (Excel 2007+) you should first open them in EXCEL and then SAVE AS to TAB delimited \*.txt. See the image to the right.

The files must include a first row of column names and one of the columns must be named VolKey (any case). The VolKey is the unique identifier for each volunteer in the VoRIS system. This bulk message system only uses the VolKey column. All other columns are ignored and only used to help volunteer system admins understand the list of volunteers.

Many of the exports in the VoRIS system include the unique VolKey value for each volunteer in your system. Invalid VolKey values are ignored and duplicate values are ignored.

The easiest way to generate a file to import is to use an export from the VoRIS reporting system. Any export which includes the VOLKEY column can be used. If you need a unique volunteer list you may be able to export a

similar list and edit the list manually. If you have something more unique email [support@thesparkteam.org](mailto:support@thesparkteam.org) and we may be able to help you.

Your file or spreadsheet may include duplication volunteers. VoRIS will sort the data and create a unique volunteer list sending the message to each volunteer only once.

Only the first 100 records of your import file are displayed after the import but all the unique matching volunteers will get your message.

**NOTE:**

In some cases your source spreadsheet may have hundreds or thousands of blank rows in it. This is just a feature of "Excel" and happens depending on how you create the list. If you import the volunteers and it shows thousands of records imports when you were expecting hundreds then this is probably the problem. VoRIS will ignore these blank rows but you may also open the TXT document and delete them.

## Message automation

Message automation can save hundreds of hours. It can automatically send out reminders, thank you messages at the end of the day, messages around general volunteer procedures and documents needed for medical professionals. The logic behind each automated message can be straight forward, such as all the volunteers at an event, or more detailed such as all the medical students at a certain clinic. When you have an idea for an automated message Spark will help you set them up if you have any questions.

Menu: Messaging → Message Automation

Home

Register

Check-In

Reports

Messaging

Admin Functions

Logoff

⌚ Setup Automation Tasks

add task

	Task Name	Event	From Date	To Date	Time (hours)	Limit	Query	Text Msg	Email	Rule #	
edit	Dental Orientation	* ALL Events *	10/1/2015	10/2/2018	13.25	One per month	Morning Status Check [2]	Text Successful Registration [1]	Dental Welcome Test [15]	12	delete
edit	Patient Numbers @ End of Day	Pasa 2015	10/22/2015	10/25/2018	17.95	Per Day / Event	Checked In Today [15]	End of Day Volunteer Message [22]		4	delete
edit	Reminder of Start Time	* ALL Events *	10/18/2015	10/25/2018	9.9	Per Day / Event	Assigned Tomorrow [14]	Reminder about TOMORROW's Assignment Text [20]	Reminder about TOMORROW's Assignment Email [21]	1	delete

Above are a few examples.

TASK NAME	Just an identifier to help you remember what the automated run is for.
EVENT	Is this for a single clinic or all clinics? Or is it disabled?
FROM DATE	Only run this automated rule for this date range.
TIME	Military time. When to execute the rule.
LIMIT	You may limit each volunteer to getting this message once a month, one per each day of the event, once per event.
QUERY	Which Bulk Message Query to use to select the volunteers for this automation task?
TEXT MSG	If this automation task is sending a text message then select it from the Texting Templates.
EMAIL	If this automation task is sending an email message then select it from the Email Templates.

## Interactive Texting

You system will be able to both send and receive text messages. You can set up bulk queries to send out text messages or send them one at a time to a specific phone number. When you receive text messages they will be forwarded to an email address you provide.

Menu: Messaging → Send/Rec Text Messages

[Home](#) [Register](#) [Check-In](#) [Reports](#) [Messaging](#) [Admin Functions](#) [Logoff](#)

📱 Text Message Processing (from 6262381004)

Send Text To:

160 character left

☐ Just show received text messages?

Limit to phone:

Direction	Date		From	To	Volunteer	Message	Comment	Status
Received	3/22/2019 10:46:54 AM	<input type="button" value="respond"/>	6262775111	6262381004	0	Thanks	Phone matched multiple volunteers	
Sent	3/22/2019 10:46:16 AM	<input type="button" value="respond"/>	6262381004	6262775111	0	(Mike) with the call result		delivered
Sent	3/22/2019 10:34:55 AM	<input type="button" value="respond"/>	6262381004	6262775111	0	(Mike) this is a test from the system bbbbbb		queued

You may send messages to any phone number, not just a registered volunteer.

## Sending text messages from a list of phone numbers

You may have a list of people for special status messaging at your clinic who are not in your volunteer database. These may be building maintenance people, security, the media, or even donors. You can keep this list of people and phone numbers in a file and then paste it in here to send them quick messages.

Menu: Messaging → Freeform Text Msg

The screenshot shows a web application interface for sending text messages. At the top is a dark navigation bar with links: Home, Register, Check-In, Reports, Messaging, Admin Functions, and Logoff. Below this is a blue header bar with a pencil icon and the text 'Send Freeform Text Messages'. The main content area has a red 'send messages' button at the top left. To its right is a text box labeled 'Text Message to Send' containing the message: 'We have just opened the cafeteria up for lunch. Please notify everyone and begin sending people in shifts.' Below the message box is a larger text box labeled 'Phone Number List' containing a list of phone numbers and names: '(626) 277-1666 ; mike whaley', '888 222 1111; susan smith', '(777) 222 3333; This is the building maintenance guy', '2134458889 ; film crew on site', and '(232)558-1122; roger smith'.

### Phone Numbers Formatting

It is intended that you will keep lists of phone numbers in other files and paste them in here. You can create any number of special lists that way. There is no substitution in these text messages.

Phone numbers may be separated by ";" characters or by enter keys. Non numeric "words" are ignored allowing you to document who owns each of the phone numbers in your file. You dont have to remove those comments. The system also strips out all the non-numeric characters so having some phone formatting and blanks still works fine. For example the following file would work fine.

```
(626) 277-1666 ; mike whaley
888 222 1111; susan smith
(777) 222 3333
2134458889
(232)558-1122; roger smith
```

You must be an administrator to use this page. The frontline volunteer accounts cannot use this page.

## Checking volunteers into your clinic

To check volunteers into your clinic on-site first logon and then select Check-In from the menu at the top.

The screenshot shows the top navigation bar with links: Home, Register, Check-In, Reports, Messaging, Admin Functions, and Logoff. The main header area includes the 'spark cares your logo' and the title 'Check In Volunteers for Pasadena Clinic 2015'. Below the title is a 'Scan Badge:' label followed by a text input field. To the right of the field is the text 'Or enter name if no badge.' Below the input field is a dark blue 'scan in' button. At the bottom of the form area, there is a small disclaimer: 'Do not use this page to search for volunteers. You will check them into the clinic. Use [this page](#) to search for volunteers.'

Place the cursor in the text box is labeled SCAN BADGE and either type in the volunteers last name or scan the QRCode or barcode on their volunteer badge or verification email. Not that QRcodes are not commonly readable by inexpensive 2D barcode readers. So only use QRcodes if you know for sure your barcode scanners can read them.

The screenshot shows the 'Check In Volunteers for Rosemead County Fair' interface. It includes the 'spark cares your logo' and the title. The 'Scan Badge:' section has a text input field, the text 'Or enter name if no badge.', and an orange 'Prt Badge' button. Below this is a dark blue 'scan in' button and the same disclaimer as the previous screenshot. To the left of the volunteer information is a grey box labeled 'size: XL'. The volunteer's name 'MIKEYMAN' is displayed in blue. Below it, 'MR. MIKE WHALEY (Dentist - General)' is shown in green. Underneath is 'IT Support' in black, followed by a green box with the text 'License not yet verified' in red. At the bottom, there is a table showing the volunteer's check-in status.

Date	Chk-In	Area	Primary	Start	Area	Alternate	Start
Sun May 5	✓	G	IT Support	5:00AM			

Once you have scanned them into the clinic you will see their status.


TSHIRT SIZE	This is the "size: XL" shown above.
BADGE NAME	MikeyMan in the above example.
FULL NAME	Mr. Mike Whaley



PROFESSION	Show above as Dentist – General
ASSIGNMENT	Their assignment for today. In this case IT Support. This helps you then tell them where they need to go.
LICENSE	If their profession requires a license the message shows their license status. It may not be a validated license. You may have a policy that medical professionals are not allowed to practice medicine until you verify their license.
PRINT BADGE	There is the orange button which allows you to print their volunteer badge.

If the volunteer is in your system but has not actually signed up for the clinic then you will see the message below. Click the red [SIGN UP] button to get them registered for the clinic.

[Home](#)
[Register](#)
[Check-In](#)
[Reports](#)
[Messaging](#)
[Admin Functions](#)
[Logoff](#)



## Check In Volunteers for Rosemead County Fair

Scan Badge:


Or enter name if no badge.

**scan in** Do not use this page to search for volunteers. You will check them into the clinic. Use [this page](#) to search for volunteers.

	First Name	Last Name	Address	City	Profession	Clinic Status	TShirt
<a href="#">Sign Up</a>	KATHY	WHALEY	1200 S. HARRIS ROAD	YPSILANTI	General Support	Not Registered for Event	XL

To finish signing them up for the clinic you will need to select their assignment. See below.

[Home](#)
[Register](#)
[Check-In](#)
[Reports](#)
[Messaging](#)
[Admin Functions](#)
[Logoff](#)



## Check In Volunteers for Rosemead County Fair

Scan Badge:

Or enter name if no badge.

**scan in** Do not use this page to search for volunteers. You will check them into the clinic. Use [this page](#) to search for volunteers.

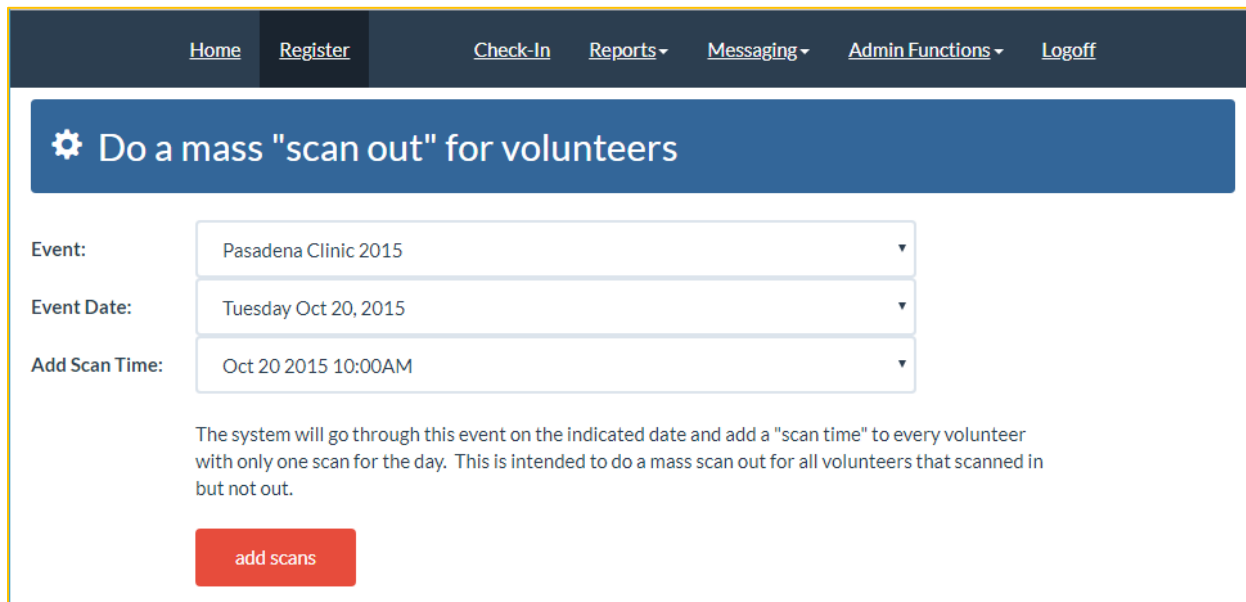
### Select assignment for MIKE WHALEY (Dentist - General)

	Area Name	Assignment	Max Vols	Signed Up
<a href="#">select</a>	General Support	IT Support	10	0

## Mass Volunteer Scan Out -- all at once

Often volunteers will forget to scan out of your clinics. This is usually not a problem unless you are trying to keep *somewhat* accurate records for volunteer time at your clinics. There is an option on the Admin menu for this mass scan out.

Menu: **Admin Functions** → **Mass Volunteer Scan Out**



The screenshot shows a web interface for performing a mass scan out. At the top is a dark navigation bar with links: Home, Register, Check-In, Reports, Messaging, Admin Functions, and Logoff. Below this is a blue header with a gear icon and the text 'Do a mass "scan out" for volunteers'. The form contains three dropdown menus: 'Event' (selected: Pasadena Clinic 2015), 'Event Date' (selected: Tuesday Oct 20, 2015), and 'Add Scan Time' (selected: Oct 20 2015 10:00AM). Below the dropdowns is a paragraph of text explaining the function: 'The system will go through this event on the indicated date and add a "scan time" to every volunteer with only one scan for the day. This is intended to do a mass scan out for all volunteers that scanned in but not out.' At the bottom of the form is a red button labeled 'add scans'.

The system will go through the selected event on the indicated date and add a "scan time" to every volunteer with only one scan for the day. This is intended to do a mass scan out for all volunteers that scanned in but not out.

## Administrators adding and editing volunteers

In some cases your VoRIS administrators may be registering some of your volunteers themselves and/or editing a volunteers information. When that happens the administrator may not know the answer to some of the "volunteer attributes" you have setup for your volunteer registration. In these cases these questions are optional. Usually all the volunteer attributes must have an answer.

[Home](#) [Register](#) [Check-In](#) [Reports](#) [Messaging](#) [Admin Functions](#) [Logoff](#)

**Other Information**  
☒ **Yes** ☐ **No** Are you interested in volunteering at a COVID-19 testing site?  

Please tell us which organization referred you to Remote Area Medical (RAM) for helping with the COVID-19 testing?

☐ **Yes** ☐ **No** Please check "YES" to acknowledge that you understand that you are responsible for the costs associated with volunteering including transportation and lodging.  
☐ **Yes** ☐ **No** Please check "YES" to acknowledge that you understand the following: You should NOT volunteer if you or someone you live with is over the age of 65; experiencing any health issues like diabetes, heart disease (including hypertension), lung disease or immunosuppression; not feeling well or has a fever; nursing or pregnant; or infected with Coronavirus.

☐ **Yes** ☐ **No** Do you have a CDL Truck Driver's License?  
☐ **Yes** ☐ **No** Pilot's License, Certifications, and Experience 

Please list any flight certifications, as well as hours/experience in each type of aircraft you are able to fly. Optional, indicate any aircraft you own. Additionally, please include any aircraft you own and would be willing to fly for RAM.

☐ **Yes** ☐ **No** Blood Borne Pathogen Certified 

Have you taken an infection control/ blood-borne pathogen certification training?


☐ **Yes** ☐ **No** Vaccinated for Hepatitis B  
☐ **Yes** ☐ **No** Are you an employee of the federal government? 

Check yes if you are employed by the US federal government directly.

☐ **Yes** ☐ **No** Interested in deploying for disaster relief missions? 

Check this box if you would like to receive more information in the event that RAM needs people to deploy for a disaster.

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## *Special Volunteers – Assignment Alerts*

Sometimes you may have special volunteers and want to be alerted when they sign up or change their registration. These may be volunteers with special skills, volunteers you may want to promote to other assignments, or they might be problem volunteers. VoRIS has an “assignment alert” process that sends an email to a specified list of addresses when a special volunteer signs up .

If you are concerned about when Mike Smith signs up to volunteer you can setup that volunteer with an “Assignment Alert”. When Mike registers or changes a registration an email goes out to the list of emails you specify. This way you can address it BEFORE they get to the site (hopefully). Of course this can be used for volunteers you may want to help in special ways or for problem volunteers.

To do this you first setup the list of email addresses.

1. Admin Functions menu → Customer Setup
2. Enter the email addresses in the Forward Volunteer Assignment Alerts field.

Then specify volunteers you want alerted:

1. Reports menu → Volunteers – Admin View
2. Find your volunteer
3. Click the [Admin] button
4. Check the box “Assignment Alert?”

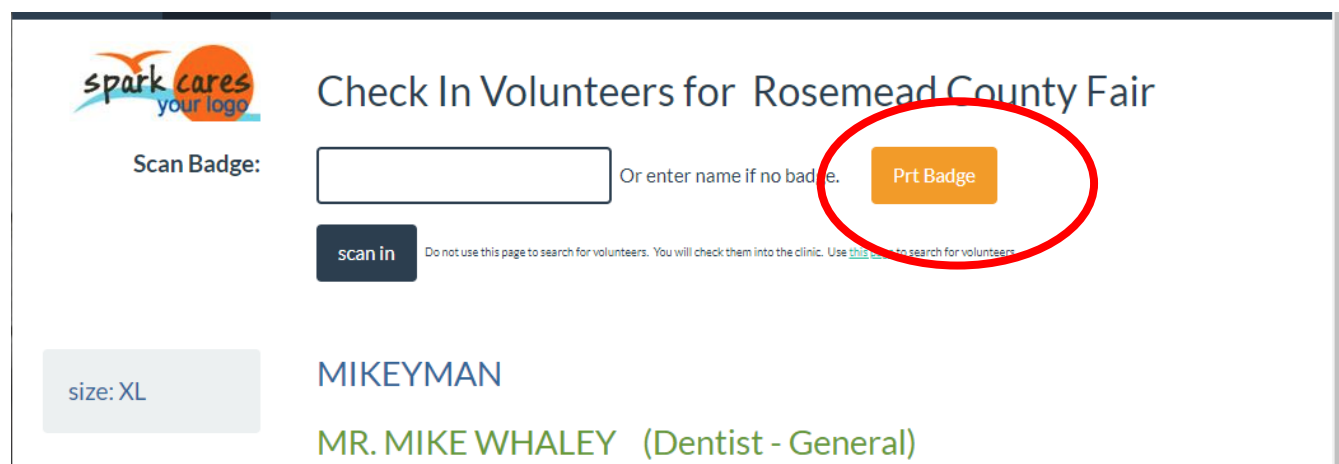
## Volunteer name badges

Volunteer events often use volunteer name badges. VoRIS prints a name badge on a shipping label size form on demand as volunteers check-in. However, this is slow and it will be faster to pre-print the name badges if you have a lot of volunteers.

### Printing name badges at your event

VoRIS is setup to print name badges on a Dymo LabelWriter 450 printer on the Dymo shipping label form. This is Dymo 30256. This is a USB connected printer. Any form of the same size - 4" x 2 5/8" will work.

When the volunteer is checked into your event just click the [Prt Badge] button and the name badge is exported to a PDF format document and opened ready to print.



The general format of the name badge is shown below. As the volunteer name gets bigger the font gets smaller. The barcode on the badge allows you to use a barcode scanner to check in the volunteers more quickly the rest of the clinic.

The volunteer's profession is also printed on their name badge. Volunteers may have several different assignments at a clinic and be moved between assignments, so it is not practical to print their assignment on their badge.



## Configuring the volunteer name badge

The Customer Setup page in the Admin menu allows you to set the name badge option. Either the system prints the badge name they selected when they registered or their full name.

<a href="#">Home</a> <a href="#">Register</a> <a href="#">Check-In</a> <a href="#">Reports</a> <a href="#">Messaging</a> <a href="#">Admin Functions</a> <a href="#">Logoff</a>		
Maximum Waiting List	<input type="text" value="125"/>	This is the maximum size waiting list allowed for any single assignment on a single day. Once you reach this number the system will no longer allow volunteers to select that event for that day as a waiting list assignment. People with the <b>Admin Code</b> will bypass this limit.
Badge Name	<input checked="" type="checkbox"/> Full Name	By default we use their "Badge Name" on their printed badge. Check here to use their full name.
Allow Delete	<input type="checkbox"/> Allow Delete	Check this to allow administrators to delete

## Other information on volunteer name badges

Sometimes there is other information you need added to the volunteer name badge. A common example is to flag volunteers at your clinic who have had blood borne pathogen training. This is done by creating a Volunteer Attribute in your system and then checking the "On Badge?" checkbox and specifying the "Badge Code" to show up on the badge.

[Home](#) [Register](#) [Check-In](#) [Reports](#) [Messaging](#) [Admin Functions](#) [Logoff](#)

**Setup Volunteer Attributes**

These are the attributes volunteers may select to describe themselves. These are not associated with a specific volunteer opportunity. [add attribute](#)

	<u>Attr Name (75 char)</u>	<u>Screen Order</u>	<u>Explain Attr (500 char)</u>	<u>Comment?</u>	<u>On Badge?</u>	<u>Badge Code</u>	<u>Active?</u>	
<a href="#">Edit</a>	Are you aware this is a just a test system?	1	This system you are using is just for software development. If you would like to help at real volunteer event please contact us.	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<a href="#">Delete</a>
<a href="#">Edit</a>	Blood Borne Pathogen Certified	1001	Have you taken the Red Cross blood borne pathogen certification training (or similar)?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	BBP	<input checked="" type="checkbox"/>	<a href="#">Delete</a>
<a href="#">Edit</a>	Vaccinated for Hepatitis B	1002		<input type="checkbox"/>	<input checked="" type="checkbox"/>	HepB	<input checked="" type="checkbox"/>	<a href="#">Delete</a>
<a href="#">Edit</a>	Volunteer Overseas?	1800	If you are interested in volunteering for overseas disaster support operations please check this box and enter your general availability. We will put you on our mailing list.	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<a href="#">Delete</a>



## *Using Microsoft Word's mail merge to print name badges in bulk*

Microsoft Word has a feature called "mail merge" which allows the bulk printing of name badges. Using this method, you can print on card stock with your own logo and formatting of the badge.

The source data for the mail-merge can be found in VoRIS. The menu **Reports → Export Data / Report** has an export called *Volunteer data by event*. This exports all the data needed to create a mail merge producing volunteer name badges in your format.

There are many ways to use the Microsoft Word mail merge and the exact process changes depending on the version of Word you are using. In Word 2016 there is a Mailings tab in the upper options ribbon, and then a Start Mail Merge icon. However, to get up to speed quicker Google "*mail merge name badges MS2010*" for videos and detailed explanations using your version of Word.

## *Creating a barcode on your own volunteer name badges*

If you are creating your own volunteer name badges using Word's mail merge or some other software it will speed up check in if you include the volunteer's barcode on the name badge. The barcode should include the volunteer's unique number, called their *VolKey* in the exported data. This volkey is preceded by the capital letter "V" with no blanks between that letter and their number. So, the volunteer number 1598 would have a barcode that translates to "V1598".

The barcode is usually generated using a barcode font. These are available for free all over the Internet. We recommend the format Code128 but any format can work. Even QRcodes work fine if your barcode scanner can read that format. Download and install the font on the computer running the mail merge process.

There is no VoRIS requirement for the barcode format. Barcode formats "Code128" and "Code39" are common formats. VoRIS does not care about the barcode format and any may be used because the handheld barcode reader you select is the device that reads and decodes the barcode. That is not done by VoRIS. The barcode reader you select must be able to read the barcode format you select.



## Volunteer Approval Process

Your events may not require a special volunteer approval process. Some events may have your volunteers around children or need some kind of special skills. The checking of medical licenses is a separate process, see that section. If you do need an approval process then VoRIS provides a multi-level approval process allowing you to implement an approval workflow for some or all of your volunteers.

To begin login as an administrator.

Menu: Admin Functions → Approve Volunteers

Volunteers Needing Approval

Last Name:  find ☒ Just show unverified?

Filter Volunteers: \*\* FILTER BY EVENT \*\* \*\* FILTER BY ASSIGNMENT \*\* \*\* FILTER BY VOL ATTRIBUTE \*\*

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Name	Profession	City	State	Status	Last Update	Updated By
edit admin ANSTON1294, BEVERLY	General Support	YPSILANTI	Washington	Started	4/2/2020 12:49:05 AM	MIKEW
edit admin ANSTON1505, BELINDA	General Support	YPSILANTI	Washington	Started	4/2/2020 12:51:52 AM	MIKEW
edit admin ANSTON1811, BELLA	Dentist - General	YPSILANTI	Washington	Started	4/2/2020 1:25:16 AM	MIKEW
edit admin ANSTON1888, BEATRICE	Dental Assistant	YPSILANTI	Washington	Started	4/2/2020 12:55:09 AM	MIKEW
edit admin ANSTON190, BELINDA	General Support	YPSILANTI	Washington	Pending		
edit admin ANSTON1958, BEN	Dental Student	YPSILANTI	Washington	Pending		

The system is setup to allow three levels to the process.

**Pending** This is how all volunteer start. This indicates the approval process has not yet started.

**Started** Select this step once the approval process has begun. This way no one else begins working on the approval for this volunteer.

**Approved or NOT Approved** Either of these indicate the approval process is completed.

You may use the Last Name search box to look for the status of a specific volunteer or narrow the list using the drop down lists.


Message automation can be setup to automatically send messages to approved volunteers when the process is completed. To implement this process please contact Spark for help with this free setup.


## Volunteer Attendance Reports – for volunteers themselves

Sometimes a volunteer will need to get documentation that they attended one of your events. VoRIS allows them to print their own attendance report to give to their boss or instructor. The report contains all their badge scans. They must remember to scan in each morning, and scan out if that time is also important to them.

Once they open their volunteer dashboard, which they see once they recall their information, they will see all the events they have attended. By clicking the blue [report] button next to the event they will see their attendance report. This offloads the work of generating these yourself.


[Home](#) [Register](#) [Check-In](#) [Reports](#) [Messaging](#) [Admin Functions](#) [Logoff](#)

 Dashboard: Available Events and History



Belinda Anston1505 (General Support) [Logoff](#) [Update](#)

	Event	Date(s)	Registered	Your Assignments	Reg Open?	Event Info	Volunteer
<a href="#">EDIT</a>	Pasadena Clinic 2015	Oct 20 - Oct 26 2015	Registered	General Support - As Assigned; Volunteer Check-In	YES	<a href="#">event info</a>	<a href="#">report</a> <a href="#">Cancel</a>



To change your profile image use the [browse] button below to upload a new image.

[Rotate Image](#)

Change profile image: [Choose File](#) No file chosen

The report is generated as a PDF file which they may then email to whoever needs it. The report will show all the badge scans or check-ins & outs at the clinic. If they need to have attended a certain amount of hours they will need to be sure to scan in and out.

## Volunteer Attendance Report



**BELINDA ANSTON1505**

Event: Pasadena Clinic 2015  
1184 Bresee Ave  
Rose Bowl  
Pasadena, CA

### Schedule at event

Date	Schedule		Assignment
2015-10-23	4:30AM	12:00PM	Volunteer Check-In
2015-10-24	6:00AM	6:00PM	General Support - As Assigned

### Check ins/out at event (badge scans):

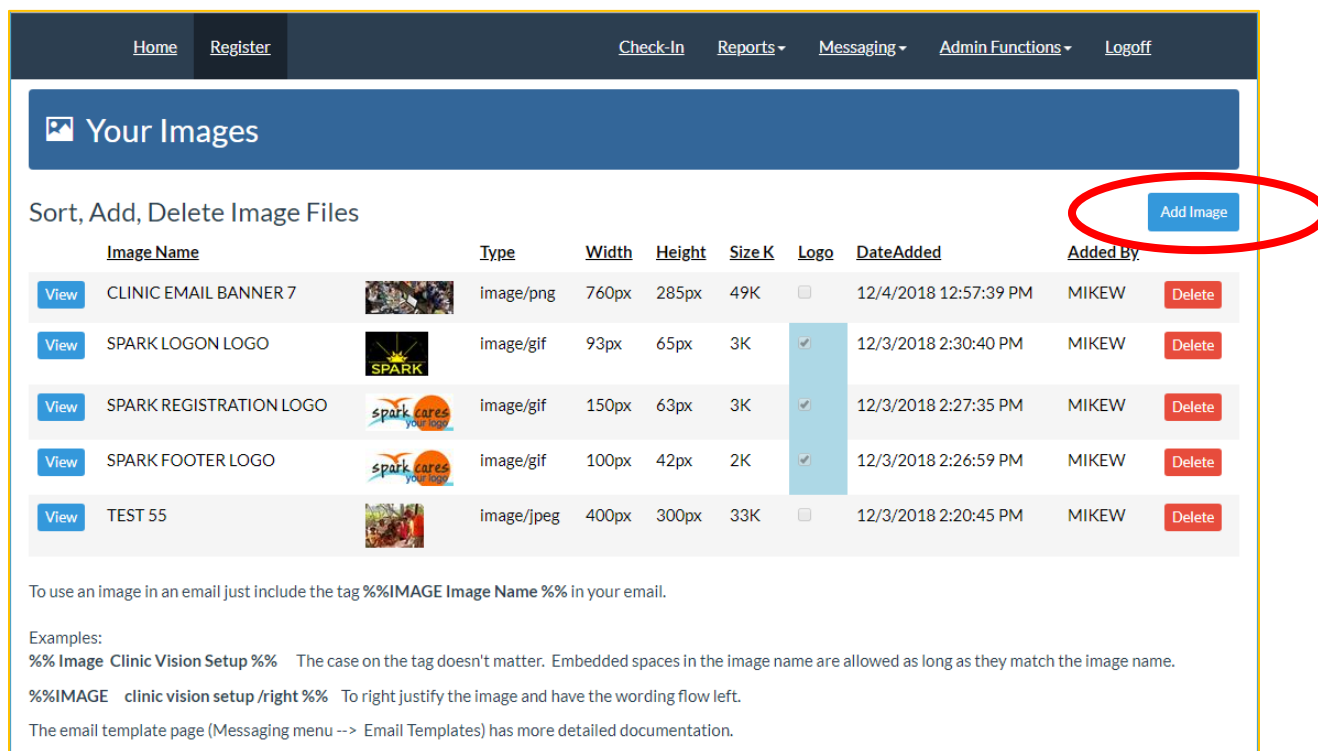
Scan Times
no scans recorded at this event

KATHY WHALEY  
Spark Team Test System

## Managing images & files for logos and email

VoRIS allows you to load your own images & files including logos for VoRIS web pages and images/files to include in emails. The system will resize images for you, for things like your logo or email banners, so they will automatically fit on the VoRIS system pages.

To load your own images/files, use menu: **Admin Functions → Your Images & Files**



**Your Images**

Sort, Add, Delete Image Files

[Add Image](#)

	Image Name	Type	Width	Height	Size K	Logo	Date Added	Added By
<a href="#">View</a>	CLINIC EMAIL BANNER 7	image/png	760px	285px	49K	<input type="checkbox"/>	12/4/2018 12:57:39 PM	MIKEW <a href="#">Delete</a>
<a href="#">View</a>	SPARK LOGON LOGO	image/gif	93px	65px	3K	<input checked="" type="checkbox"/>	12/3/2018 2:30:40 PM	MIKEW <a href="#">Delete</a>
<a href="#">View</a>	SPARK REGISTRATION LOGO	image/gif	150px	63px	3K	<input checked="" type="checkbox"/>	12/3/2018 2:27:35 PM	MIKEW <a href="#">Delete</a>
<a href="#">View</a>	SPARK FOOTER LOGO	image/gif	100px	42px	2K	<input checked="" type="checkbox"/>	12/3/2018 2:26:59 PM	MIKEW <a href="#">Delete</a>
<a href="#">View</a>	TEST 55	image/jpeg	400px	300px	33K	<input type="checkbox"/>	12/3/2018 2:20:45 PM	MIKEW <a href="#">Delete</a>

To use an image in an email just include the tag %%IMAGE Image Name %% in your email.

Examples:

%% Image Clinic Vision Setup %% The case on the tag doesn't matter. Embedded spaces in the image name are allowed as long as they match the image name.

%%IMAGE clinic vision setup /right %% To right justify the image and have the wording flow left.

The email template page (Messaging menu --> Email Templates) has more detailed documentation.

Images are stored in the Amazon S3 high performance cloud storage system. This makes their access extremely fast and secure.

You may load any number of images & files into your system.

## File types supported for upload and use

VoRIS supports the following file types:

- Jpg images
- Png images
- Gif images
- Adobe Acrobat files
- MS Word files
- MS Excel files

## Passwords and User Security

There are two main kinds of users in VoRIS. The administrators (or named users) and the temporary front line volunteers helping you at your clinics.

### Administrators

Administrators may change your clinics, manually update volunteer schedules, send out messages, and do all the things the front-line volunteers can do. To add/update these administrator accounts go to menu

Admin Functions → Admin Setup

Home

Register


Check-In

Reports

Messaging

Admin Functions

Logoff


System Administrators and Users

These the notes at the bottom of the page for what each admin type is able to do.

Show Disabled?

add admin

	UserName	Password	Name	Email	Admin	Supervisor	Network Limited	Set Net Security	Enabled	Event	Logons	Admin #
Edit	HAMSTER	#####	Hamster	hamster@thesparkteam.org	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Pasa 2015	21	47
Edit	MIKEW	#####	Mike Whaley	mikew@phfewic.org	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Pasa2016	1361	1
Edit	VOLUNTEER1	#####	Volunteer 1	none	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		32	13
Edit	VOLUNTEER10	#####	Volunteer 10	none	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		1	23

USERNAME	This is the logon name, or account name, used when the administrator logs on to VoRIS.
NAME	This is the display name shown on some reports documenting which administrator has made changes.
EMAIL	This is just by the named administrator to reset their password.
ADMIN	If this is set, the account is a full administrator on the system and may change events, update volunteers, send messages, and so on.
SUPERVISOR	See this documents section on Account Permissions. They have mostly front-line volunteer permissions and can't change things.
NETWORK LIMITED	If this is set the volunteer may only logon to VoRIS from network locations identified using the Network Security process. This keeps your temporary volunteers from using their passwords to logon from their homes or phones.
SET NET SECURITY	If this is set they can setup the network security at a location. Administrators automatically have this permission.
ENABLED	Uncheck this to disable logons from this account.
EVENT	If the account is setup to default to a certain event it will show up here. This is not usually the case.

LOGONS                      The number of times the account has been used.

### *Front-line volunteer accounts (temporary)*

Twenty accounts for use by front-line temporary volunteers are pre-defined in the system. These are named Volunteer1, Volunteer2, Volunteer3, .... Volunteer20. These are used by the volunteers helping you check-in volunteers at your clinics, print name badges, and look at some basic reports.

These passwords can be set individually by using the same method as setting the passwords for the Administrator accounts. But this is not usually necessary. There is a web page in the system that allows you to reset these passwords all at once. We suggest this always be done between clinics.

Menu    Admin Functions → Reset Passwords

Type in the new password and click the [set password] button.

Passwords are NOT case sensitive and must be at least 5 characters long.

## Account Permissions

What can each type of user account do on the system?

Function	Front-line volunteer accounts. Volunteer <sub>1</sub> , volunteer <sub>2</sub> ,	Supervisors	Administrators
Check-in volunteers showing them at the clinic, print volunteer badges	Yes	Yes	Yes
See the following reports: <ul style="list-style-type: none"> <li>Volunteers @ Clinic</li> <li>Assignment summary</li> <li>Assignment Day CrossTab</li> <li>Host volunteer report</li> <li>Chart assignments</li> <li>Chart Registrations</li> </ul>	Yes	Yes	Yes
See the following reports: <ul style="list-style-type: none"> <li>Volunteer Day/CrossTab Area</li> <li>Volunteer Day/CrossTab Assignments</li> <li>Volunteer Day/CrossTab Attributes</li> <li>Waiting List Details</li> </ul>		Yes	Yes
Switch to other clinics		Yes	Yes
All messaging functions			Yes
Add events, add professions, add assignments, edit event assignments			Yes
Move people manually off the waiting lists			Yes
Export data – see all the reports			Yes
Set the Network Security for an event		Only if they have the network security attribute on their account.	Yes



## Specific admin settings

The individual administrator settings are explained below.

System Administrators and Users												
These the notes at the bottom of the page for what each admin type is able to do. <input type="checkbox"/> Show Disabled? <input type="checkbox"/> Show Team Accounts? <a href="#">add admin</a>												
	UserName	Password	Name	Email	Admin	Supervisor	Network Limited	Set Net Security	Special Events	Enabled	Event	Logons
<a href="#">Edit</a>	HAMSTER	#####	Hamster	hamster@thesparkteam.org	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		44
<a href="#">Edit</a>	MIKEW	#####	Mike Whaley	mikew@phfewic.org	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Pasa2016	1573

- The **"Admin"** privilege is required to edit/add events, assignments, send messages, run queries, edit admins, etc...
- **Supervisor** can do a few more things than a regular volunteer, see volunteer contact information for example and reset the "volunteer1" passwords.
- Without **Admin** or **Supervisor** privileges a user (like the Volunteer1 accounts) may only scan in volunteers and look up people for basic schedule information. This is intended for on-site general volunteers.
- The **Set Net Security** permission allows the user to set a network location for access to the VoRIS system at events. This allows Network Limited users to use VoRIS at your clinics. Users with the Admin privilege automatically have this permission.
- The **Special Events** permission allows admin accounts for hosts, not full "Admins", to see multiple events. In the event/clinic definition set the "Special Event" checkbox. If the admin account has the Special Events flag set then the account may see those events. This allows you to have a low permission host account view multiple events. For regular HOST accounts do not set this flag.
- **Network Limited** means they can only logon at locations setup in the VoRIS network security tables.
- **Event** - If Event is specified then the admin is initially set to this event. Mostly used to lock a Host Admin into an event.

## Event Host Admin Accounts

In some cases you may have events where you want some subset of users to be able to review some of the reports to help manage the volunteers for that event. They need to see reports for that clinic but they are not full admins and should not be able to see all the volunteers and all the events, or modify the setup of any events.

Example:

You have a clinic in Cleveland, Ohio and want to give two people in Cleveland access to reports and lists of volunteers so that they may help the volunteer outreach.

For a "Host account" set the following parameters:

- The "Admin" -- OFF
- **Supervisor** -- OFF
- The **Set Net Security** -- OFF
- The **Special Events** -- OFF -- see the section on "special events"
- **Network Limited** -- OFF -- meaning they may logon from their home or office
- **Event** -- Set this to their specific event. In the example you would set this to the Cleveland event.
- **Enabled** -- ON

With this setup they may logon to your system and see the specified event only. They may not modify events or send messages.

## Special Event Host Admin Accounts

In some cases you may have a group of events where you want some subset of users to be able to review some of the reports to help manage the volunteers for that subset of events. They need to see reports for that clinic but they are not full admins and should not be able to see all the volunteers and all the events, or modify the setup of any events.

Example:

You have a series of COVID19 testing sites around the country. There are some related organizations helping you recruit and manage those volunteers and you want to give a group of people access to reports and lists of volunteers so that they may help the volunteer outreach for that subset of events.

The first step is to identify those events. When you are setting up these events there is a checkbox or "special event?". If checked then this event is considered part of the subset of events these "Special Hosts" may see.

<b>Special Event?</b> <input checked="" type="checkbox"/> Yes	If this is checked the event is considered a "special event". Admins can see all events. But low permission "host" accounts may be set to only view a single event or they may have the "Special Events" checkbox set. With that set these "host" accounts may view all the open clinics (those accepting volunteer registrations) with this "special event" checkbox set. This allows a host account to view more than one event.
---	--

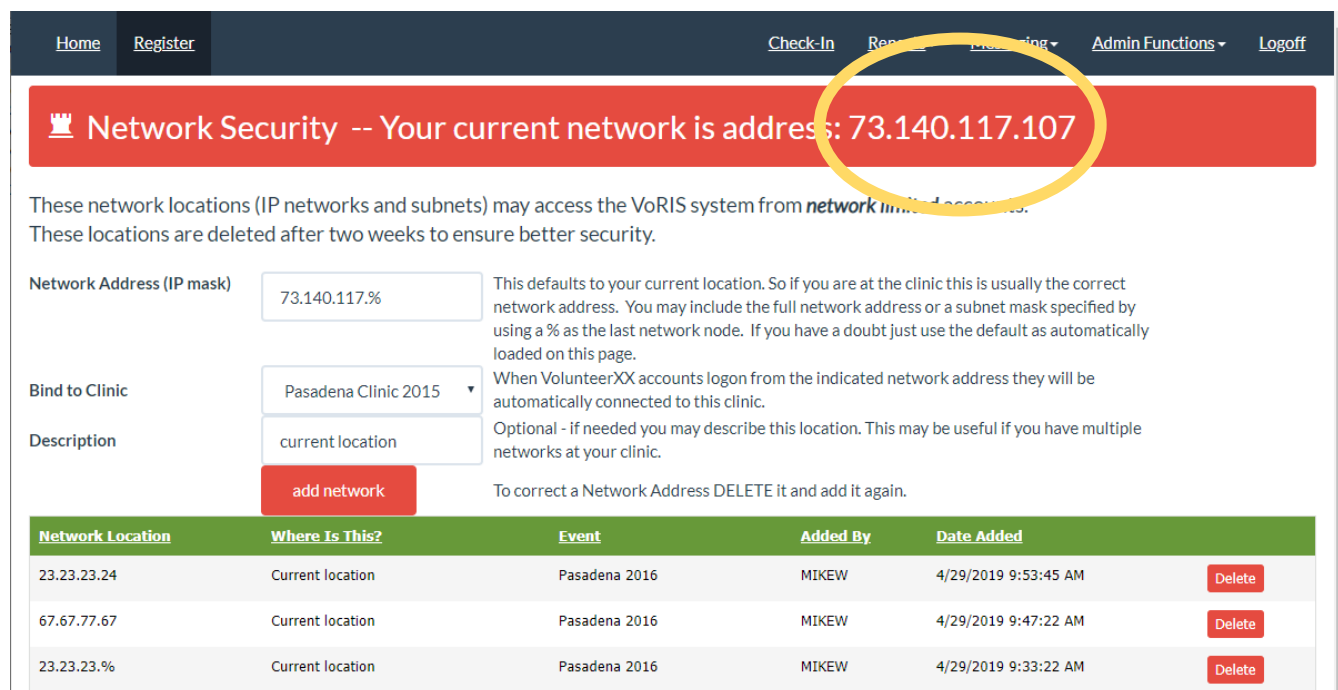
For a "Special Host account" set the following parameters:

- The **"Admin"** -- OFF
- **Supervisor** -- OFF
- The **Set Net Security** -- OFF
- The **Special Events** -- ON -- see the section on "special events"
- **Network Limited** -- OFF -- meaning they may logon from their home or office
- **Event** -- This is optional. It will set their initial event but they may change to view reports on any of the events marked "special event" which are open for registration.
- **Enabled** -- ON

These special event host administrators may only see events which are open for registration.

## Network Security – Clinic Setup

Since this system is in the cloud it may be accessed from anywhere. For administrator accounts this is what you want usually but not for the volunteers who are helping you on-site at a clinic. Those accounts need to be limited.



Home Register Check-In Register Processing Admin Functions Logoff

**Network Security -- Your current network is address: 73.140.117.107**

These network locations (IP networks and subnets) may access the VoRIS system from **network limited accounts**. These locations are deleted after two weeks to ensure better security.

Network Address (IP mask)  This defaults to your current location. So if you are at the clinic this is usually the correct network address. You may include the full network address or a subnet mask specified by using a % as the last network node. If you have a doubt just use the default as automatically loaded on this page.

Bind to Clinic  When VolunteerXX accounts logon from the indicated network address they will be automatically connected to this clinic.

Description  Optional - if needed you may describe this location. This may be useful if you have multiple networks at your clinic.

To correct a Network Address DELETE it and add it again.

Network Location	Where Is This?	Event	Added By	Date Added	
23.23.23.24	Current location	Pasadena 2016	MIKEW	4/29/2019 9:53:45 AM	<input type="button" value="Delete"/>
67.67.77.67	Current location	Pasadena 2016	MIKEW	4/29/2019 9:47:22 AM	<input type="button" value="Delete"/>
23.23.23.%	Current location	Pasadena 2016	MIKEW	4/29/2019 9:33:22 AM	<input type="button" value="Delete"/>

This is much easier than it appears but does need to be done at least once at each clinic location.

Menu: Admin Functions → Network Security

Open this page.

**NETWORK ADDRESS (IP mask)** 99% of the time this will default to the correct address if you open the page when at the clinic. So let this default.

If someone has called you from the clinic, you are not at the clinic, ask them to give you the IP address shown highlighted by the yellow circle above. Type that value into this page.

**BIND TO CLINIC** Select the clinic at this address. This way the front line volunteers who use your system on this network will automatically be logged onto the correct clinic.

**DESCRIPTION** Use this to give a little note on where this network is located if needed.

## Volunteers may add profile images (this is optional)

Volunteers may now add their own profile images. These images can be viewed by VoRIS administrators as well as on the VoRIS mobile web app. This may be useful when trying to identify a volunteer at a clinic.

- If you get a phone message during a clinic for volunteer Steve Smith and you look him up and find he is in the dental area -- but which volunteer? Now using the mobile web app you can display his profile picture to help you find him.
- If you find a vision form that is not completely filled out and you need to find the optician to get the form corrected you may now display their profile picture in the VoRIS desktop application or on the mobile web app.

### How does a volunteer add a profile picture?

The volunteer may add profile images when registering from a desktop or mobile device. There is a new section in the Customer Setup page which allows you to set the wording highlighted with the red circle. In addition, if you don't want to use profile processing, this profile picture process can all be hidden using a checkbox in the Customer Setup page.

To add a profile picture the volunteer simply clicks browse and selects an image on their phone or desktop computer. The image is saved when they save their registration.

Optional Profile Picture

Select your profile picture  Browse...

You may optionally upload a profile image. Just skip this option if you do not care to share an image. We accept GIF, JPG, and PNG images.

The customer setup page allows you to change the wording seen on the registration page (circled above).

## What types of images may a volunteer use?

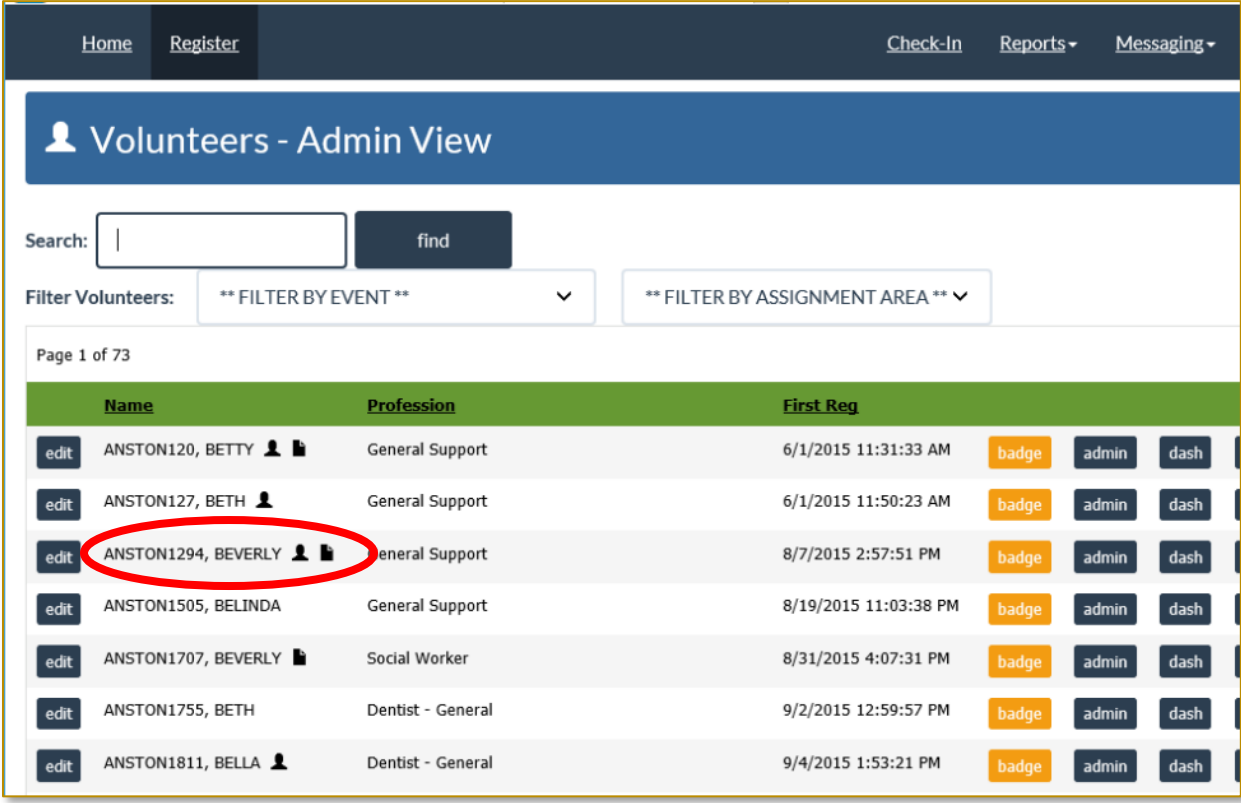
Volunteers may load GIF, JPG, or PNG images of any size. They do not need to be compressed or sized. VoRIS compresses and resizes the images to within a 400x400 frame. This makes this process very easy for the volunteers to use.

## How secure are these images?

All these images are individually encrypted and stored in the Amazon Cloud, not in a standard file system. This provides layers of backup and high performance secure access.

## How do administrators review profile images?

The Admin View page now shows a *person* icon next to the volunteer if they have loaded a profile image. To see the image you may either [Edit] the volunteer's registration record, look at their [dash] dashboard, or open the [admin] administration page for that volunteer. These will all show their profile image.



Home		Register		Check-In		Reports		Messaging	
Volunteers - Admin View									
Search:		<input type="text"/>		find					
Filter Volunteers:		** FILTER BY EVENT **		▼		** FILTER BY ASSIGNMENT AREA ** ▼			
Page 1 of 73									
	Name	Profession	First Reg						
edit	ANSTON120, BETTY	General Support	6/1/2015 11:31:33 AM	badge	admin	dash			
edit	ANSTON127, BETH	General Support	6/1/2015 11:50:23 AM	badge	admin	dash			
edit	ANSTON1294, BEVERLY	General Support	8/7/2015 2:57:51 PM	badge	admin	dash			
edit	ANSTON1505, BELINDA	General Support	8/19/2015 11:03:38 PM	badge	admin	dash			
edit	ANSTON1707, BEVERLY	Social Worker	8/31/2015 4:07:31 PM	badge	admin	dash			
edit	ANSTON1755, BETH	Dentist - General	9/2/2015 12:59:57 PM	badge	admin	dash			
edit	ANSTON1811, BELLA	Dentist - General	9/4/2015 1:53:21 PM	badge	admin	dash			

At clinics you will have front line volunteers helping with volunteer registration and they cannot see the Admin View page. These clinic volunteers will mainly be using the "Volunteers @ Event" report to manage volunteers. See the next topic to understand how they can see profile images.

## Volunteers assisting with volunteer registration – access to profile images

On the [Volunteers @ Event](#) page a small profile image icon is displayed if the volunteer has loaded a profile image. Your volunteer assistants at the clinic may click on that icon image and the full sized profile image will be displayed.

The screenshot shows the 'Volunteers @ Pasadena 2016' page. At the top, there are navigation links: Home, Register, Check-In, and R. Below this is a search bar with the text 'Volunteers @ Pasadena 2016'. There are filters for 'Last Name' (part of last name), 'Assignment Area Today' (\*\* All registered volunteers \*\*), 'Date' (Sat 02/06/2016), and 'Languages' (\*\* All Languages \*\*). A table lists volunteers with columns: Name, Status (checked/unchecked), Date, Today, and BBP. The first row, ANSTON2, KADIE, has a small profile image icon circled in red. Other volunteers listed include ASDASD, ASDASDA, DFGDFG, DFG, WHALEY, BETHANY, and WHALEY, KATHY.

Name	Status	Sat 02/06/2016	Today	BBP
ANSTON2, KADIE	✓	Dental	Dentist - Restorative	BBP
ASDASD, ASDASDA		General Support	General Support - As Assigned	
DFGDFG, DFG	✓	Dental	Dental Hygiene	
WHALEY, BETHANY				BBP
WHALEY, KATHY	✓	Dental	Dental X-Ray	BBP

## Turning off volunteer profile image processing

To control profile image processing on your system open the customer setup page at menu:

**Admin Functions → Customer Setup**

In the blue section seen below you may turn off the option completely or change the wording beside the upload control on the registration page.

The screenshot shows the 'Admin Functions - Customer Setup' page. The 'Allow Volunteer Profile Images?' option is checked (Yes). Below this is an 'Explanation for Profile Images' section with a text box containing: 'You may optionally upload a profile image. Just skip this option if you do not care to share an image. We accept GIF, JPG, and PNG images.' To the right, there is a description: 'When a volunteer registers should they have the opportunity to save a profile picture? This will appear on the registration page as the explanation for the profile images.'

## *Volunteers may upload documents which are saved with their volunteer record*

Some of you have requested that volunteers be allowed to upload documents into the volunteer system as a way of their providing documentation you may need. This might be

- licensing documentation if it is needed in some special cases (possibly truck drivers or some medical specialties)?
- In some cases for overseas operations you may need passport information, immunizations, travel documents, or other documents.
- Volunteer can also sign documents you need then scan them in and add them to your system.
- Some of your “resource volunteers” may be part of a group setting up a table at your events. They may need to send you space requirements, network and power requirements, or schedules. VoRIS may be a convenient place to keep this information for future clinics.

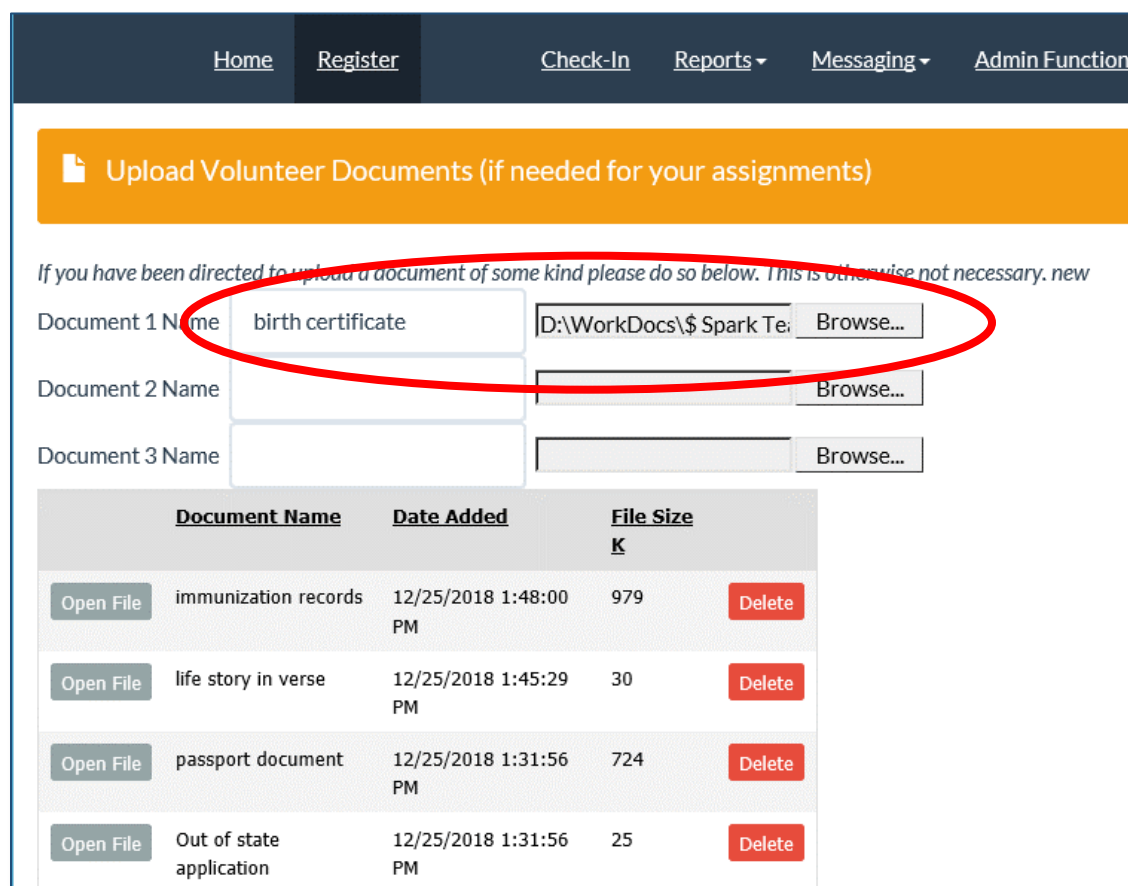




## What does the volunteer see at registration?

The volunteer registration page now optionally contains a new section (seen below) on both the desktop and mobile volunteer registration pages.

To upload a new document the volunteer types in their name for the document then clicks the [browse] button to select the document on their mobile device or their PC. Then when they save their registration changes these documents are also saved.



Home Register Check-In Reports Messaging Admin Function

**Upload Volunteer Documents (if needed for your assignments)**

If you have been directed to upload a document of some kind please do so below. This is otherwise not necessary. new

Document 1 Name birth certificate D:\WorkDocs\Spark Te Browse...

Document 2 Name Browse...

Document 3 Name Browse...

	Document Name	Date Added	File Size K	
Open File	immunization records	12/25/2018 1:48:00 PM	979	Delete
Open File	life story in verse	12/25/2018 1:45:29 PM	30	Delete
Open File	passport document	12/25/2018 1:31:56 PM	724	Delete
Open File	Out of state application	12/25/2018 1:31:56 PM	25	Delete

The system also shows them all the documents they have previously uploaded into VoRIS. They may delete the documents or display them.


## What types of documents may a volunteer upload?

Volunteers may load GIF, JPG, or PNG images of any size. They may also upload Word files (both DOC and DOCX), Adobe Acrobat (PDF) files, text (txt) files, and Excel spreadsheets (both XLS and XLSX).

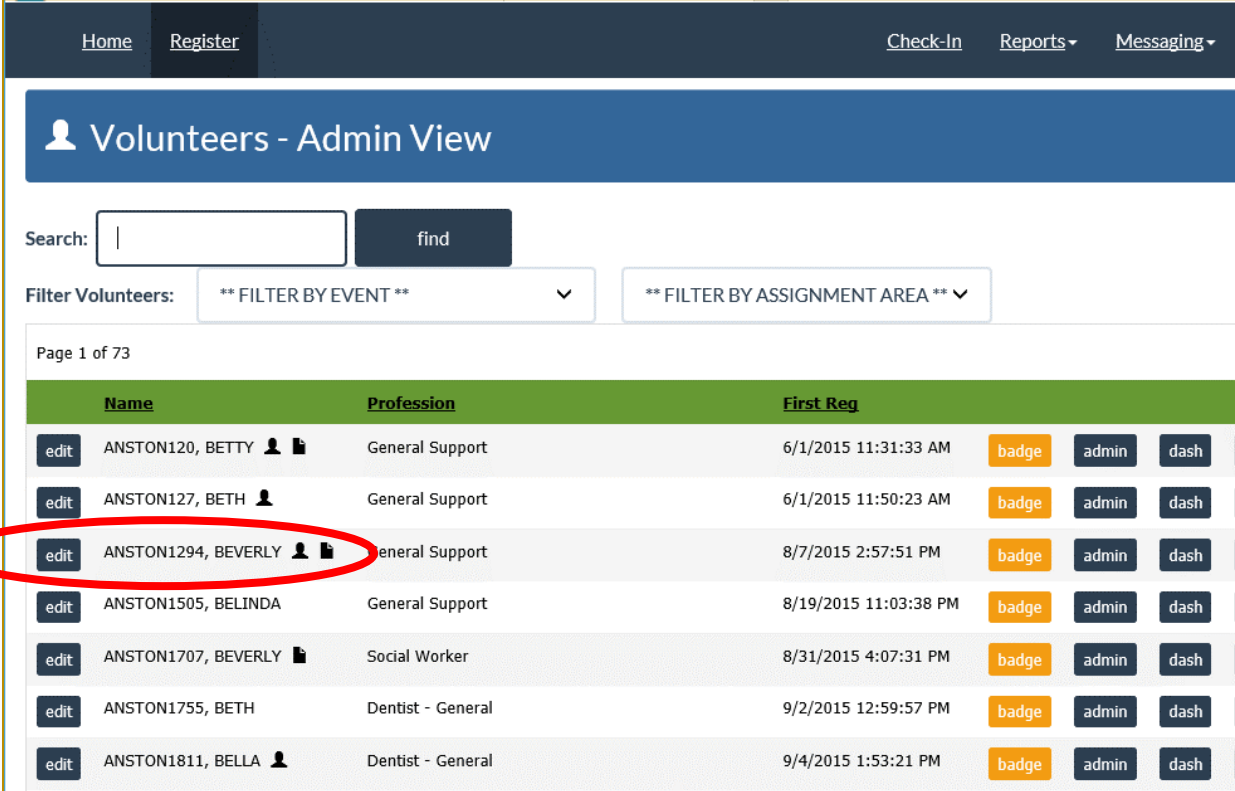
## How secure are these documents?

All these images are individually encrypted and stored in the Amazon Cloud, not in a standard file system. This provides layers of backup and high performance secure access. These documents are NOT accessible by the volunteers you that are temporarily assisting you at clinics, only your full administrators.

## Administrators accessing volunteer documents

If a volunteer has uploaded documents you will see a file/page icon  next to their name. Click on the [admin] button to open the administrator view of the volunteer data to see the uploaded documents.

Notice you may filter this list by clinic and by assignment area to search on the volunteers you may need.










Home Register Check-In Reports Messaging

### Volunteers - Admin View

Search:  find

Filter Volunteers: \*\* FILTER BY EVENT \*\* \*\* FILTER BY ASSIGNMENT AREA \*\*

Page 1 of 73

	Name	Profession	First Reg			
edit	ANSTON120, BETTY  	General Support	6/1/2015 11:31:33 AM	badge	admin	dash
edit	ANSTON127, BETH 	General Support	6/1/2015 11:50:23 AM	badge	admin	dash
edit	ANSTON1294, BEVERLY  	General Support	8/7/2015 2:57:51 PM	badge	admin	dash
edit	ANSTON1505, BELINDA	General Support	8/19/2015 11:03:38 PM	badge	admin	dash
edit	ANSTON1707, BEVERLY 	Social Worker	8/31/2015 4:07:31 PM	badge	admin	dash
edit	ANSTON1755, BETH	Dentist - General	9/2/2015 12:59:57 PM	badge	admin	dash
edit	ANSTON1811, BELLA 	Dentist - General	9/4/2015 1:53:21 PM	badge	admin	dash

Once you open the admin page for a volunteer you will see all the documents they have uploaded. You may open any of the files.

<a href="#">Home</a> <a href="#">Register</a> <a href="#">Check-In</a> <a href="#">Reports ▾</a> <a href="#">Messaging ▾</a> <a href="#">Admin Functions ▾</a> <a href="#">Logoff</a>					
Volunteer Files (uploaded by the volunteer)					
	<u>Document Name</u>	<u>Date Added</u>	<u>File Size K</u>	<u>Doc Internal #</u>	<u>Content Type</u>
<a href="#">Open File</a>	immunization records	12/25/2018 1:48:00 PM	979	11	application/vnd.openxmlformats-officedocument.wordprocessingml.document
<a href="#">Open File</a>	life story in verse	12/25/2018 1:45:29 PM	30	10	application/vnd.openxmlformats-officedocument.wordprocessingml.document
<a href="#">Open File</a>	passport document	12/25/2018 1:31:56 PM	724	8	application/pdf
<a href="#">Open File</a>	Out of state application	12/25/2018 1:31:56 PM	25	7	application/vnd.openxmlformats-officedocument.wordprocessingml.document

If you want to delete any of these documents open the volunteer's full registration record. Then scroll down to the uploaded files and you may delete any file just like the volunteer would do.

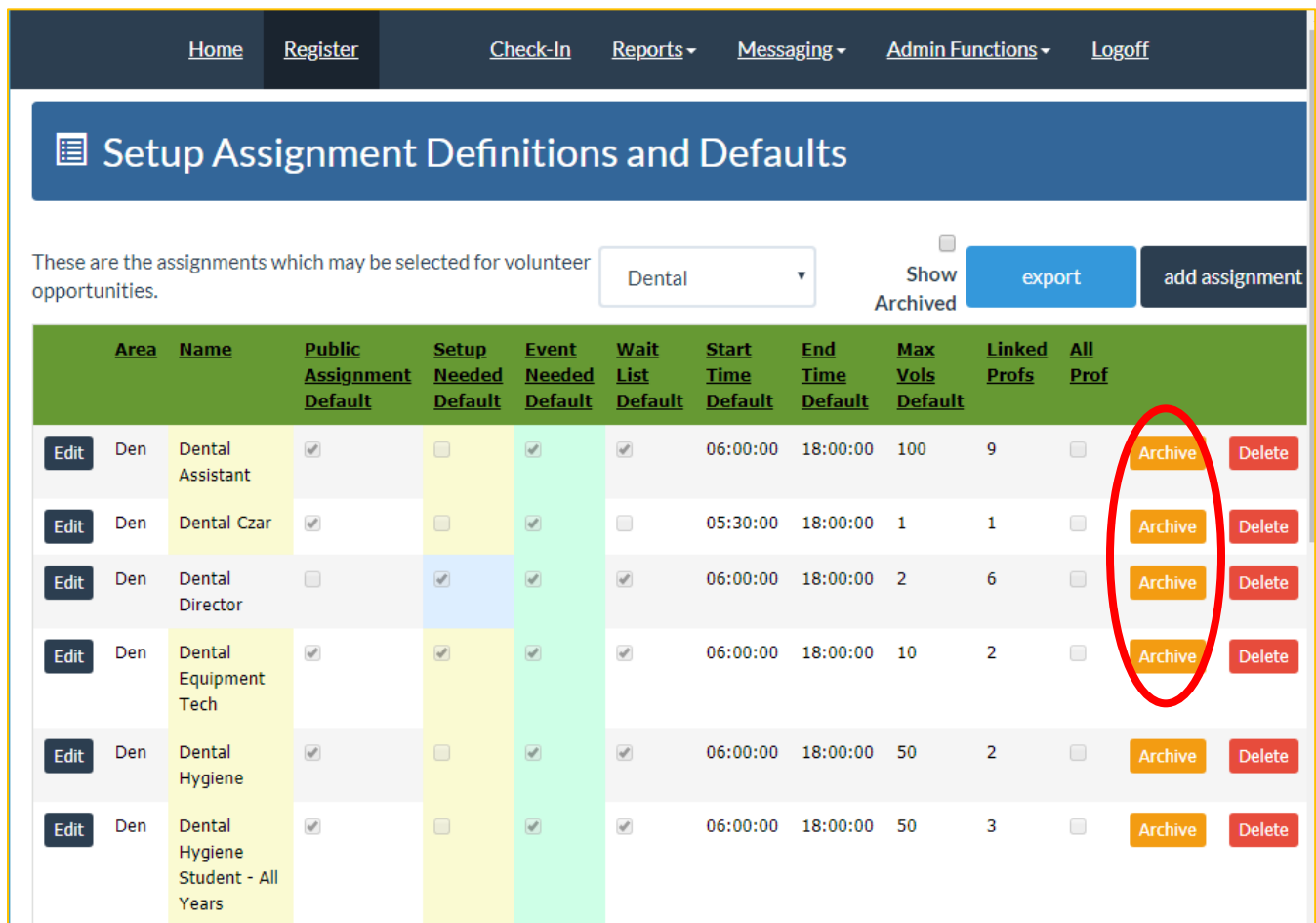
## Cleaning up your system

After a while you may have old assignment types and messages you no longer use.

### Archiving assignment definitions

Many customers have added a lot of assignments to their system and some of these assignments are no longer used. You may have changed how you manage assignments or decided to discontinue some specific assignment types. In order to clean up the assignment definition list VoRIS now allows you to archive assignment definitions. When you archive an assignment, it will no longer show up on some of the setup pages but it will still show up in history reports.

On the assignment definition page (see below) you can now see the new orange archive button on the right.



These are the assignments which may be selected for volunteer opportunities.

Dental ▼ Show Archived ☒ export add assignment

	Area	Name	Public Assignment Default	Setup Needed Default	Event Needed Default	Wait List Default	Start Time Default	End Time Default	Max Vols Default	Linked Profs	All Prof	
Edit	Den	Dental Assistant	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	06:00:00	18:00:00	100	9	<input type="checkbox"/>	Archive Delete
Edit	Den	Dental Czar	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	05:30:00	18:00:00	1	1	<input type="checkbox"/>	Archive Delete
Edit	Den	Dental Director	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	06:00:00	18:00:00	2	6	<input type="checkbox"/>	Archive Delete
Edit	Den	Dental Equipment Tech	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	06:00:00	18:00:00	10	2	<input type="checkbox"/>	Archive Delete
Edit	Den	Dental Hygiene	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	06:00:00	18:00:00	50	2	<input type="checkbox"/>	Archive Delete
Edit	Den	Dental Hygiene Student - All Years	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	06:00:00	18:00:00	50	3	<input type="checkbox"/>	Archive Delete

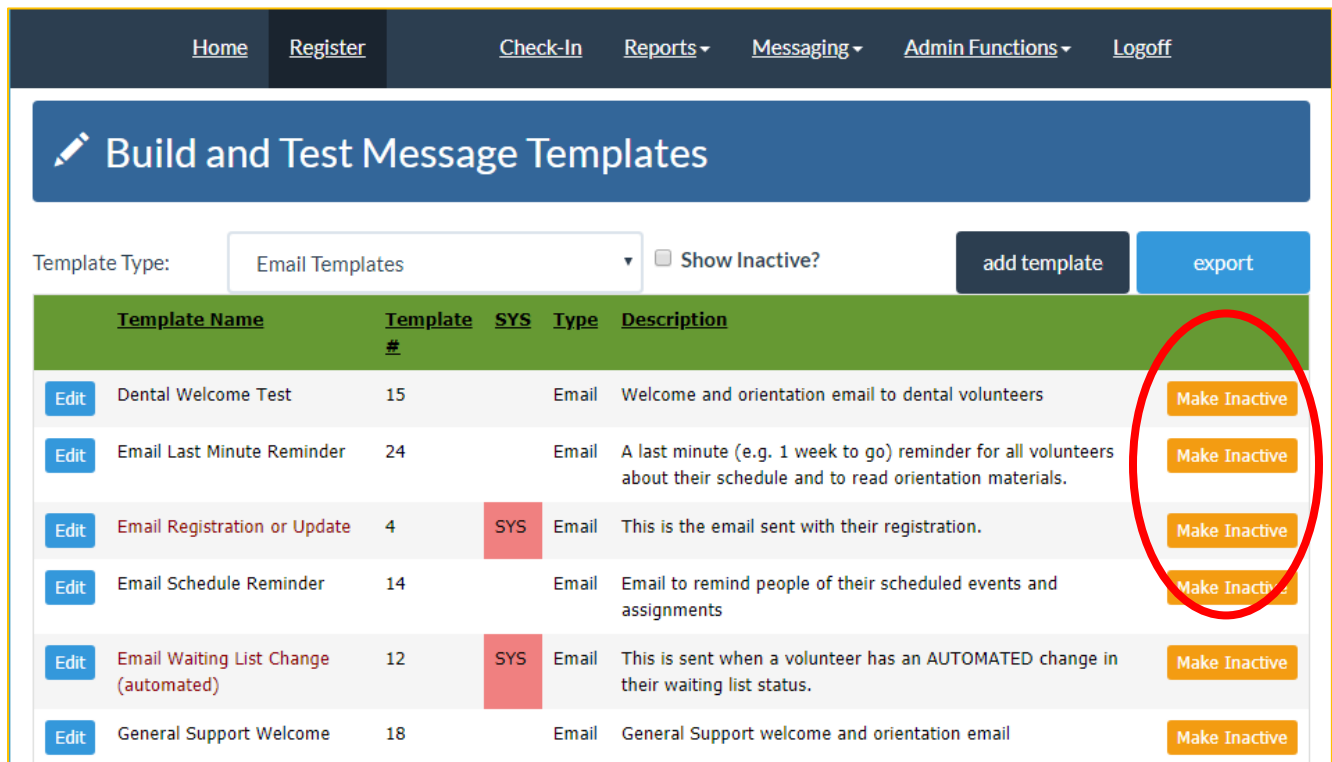
When you click [Archive] the assignment definition will be removed from this page and a few others to make the lists more manageable. Notice the checkbox "Show Archived" at the top. This will show you the archived assignments in case you want to reverse the archive status.

In addition, when you make a copy of a clinic to make a new clinic the archived assignment definitions will not be copied. This helps to clean up your clinic definitions as well.

## Cleaning up your email & texting template lists

Some of you are accumulating quite a few email & texting templates. These messaging templates might only be used once for a specific clinic. They may be for parking instructions or driving directions or for a specialty assignment type only used at a special clinic. The email template lists can grow quite large.

The template processing page now contains a button to allow you to make the email templates inactive so they will not show up on this page, cleaning up the list.



The screenshot shows the 'Build and Test Message Templates' interface. At the top, there is a navigation bar with links: Home, Register, Check-In, Reports, Messaging, Admin Functions, and Logoff. Below the navigation bar is a header section with a pencil icon and the text 'Build and Test Message Templates'. Underneath the header, there is a form with 'Template Type:' set to 'Email Templates', a 'Show Inactive?' checkbox, and buttons for 'add template' and 'export'. The main content is a table with the following columns: Template Name, Template #, SYS, Type, and Description. The table lists several email templates, including 'Dental Welcome Test', 'Email Last Minute Reminder', 'Email Registration or Update', 'Email Schedule Reminder', 'Email Waiting List Change (automated)', and 'General Support Welcome'. Each row has an 'Edit' button on the left and a 'Make Inactive' button on the right. A red circle highlights the 'Make Inactive' buttons for the first five templates.

	Template Name	Template #	SYS	Type	Description	
Edit	Dental Welcome Test	15		Email	Welcome and orientation email to dental volunteers	Make Inactive
Edit	Email Last Minute Reminder	24		Email	A last minute (e.g. 1 week to go) reminder for all volunteers about their schedule and to read orientation materials.	Make Inactive
Edit	Email Registration or Update	4	SYS	Email	This is the email sent with their registration.	Make Inactive
Edit	Email Schedule Reminder	14		Email	Email to remind people of their scheduled events and assignments	Make Inactive
Edit	Email Waiting List Change (automated)	12	SYS	Email	This is sent when a volunteer has an AUTOMATED change in their waiting list status.	Make Inactive
Edit	General Support Welcome	18		Email	General Support welcome and orientation email	Make Inactive

This can also be reversed for a template in case you find some of them are good examples.

# VoRIS Waiting List Automation

## Overview

VoRIS has a sophisticated waiting list process which automatically works without you needing to know the details. However, if you feel the need to dive in, here are the details.

The system will always pull someone off the waiting list to fill an opening. The “use waiting list” flag for the assignment / day does not affect this promotion process. That flag does affect volunteers getting on the waiting list in the first place, but once on the waiting list the system will always work tirelessly to promote them to a real assignment if there is a cancellation.

The only time VoRIS doesn’t pull someone off the waiting list if the assigned volunteer number goes below the maximum is if:

1. The event registration is not open.
2. It is on or after that assignment’s date. VoRIS does not promote volunteers on the same day as the assignment or after that date. So if the assignment is Friday, May 5<sup>th</sup>, and someone cancels on May 5<sup>th</sup>, they will not be reassigned and no message will go out.

## Waiting List Automation FAQ

**How do I stop volunteers from being promoted on an event still open for registration?**

The only way is to set down the maximum allowed volunteers for the assignment. If there are now 47 volunteers signed up set the maximum to 47 or lower. That will stop promotions.

**What happens when I set the assignment “Wait List Now” flag?**

That flag is no longer a manual control.

**How does the promotion process work?**

When promotions happen (someone is moved off the waiting list) there are lots of things updated and emails & text messages sent out. So this is not done in “real time” when the volunteer cancels because it would hold up the volunteer interactive page too long. There is a process that runs periodically (hourly right now but I may set it quicker) and it looks for assignments below the maximum with a waiting list and fills them. Then it sends out the notification emails.

**What if someone cancels and before the promotion process runs and another volunteer signs up? Do they jump ahead in the line?**

No, but good question (haha). The system knows the assignment is in waiting list status and will drop the new volunteer at the end of the line. They might actually get promoted in less than an hour when the promotion process runs... And then notified.

**What does the Event’s “Waiting List” checkbox actually do?**

This prevents new registrations and updates from getting on a waiting list. It does not impact the process for people ALREADY on a waiting list. This is an event-wide setting. It takes effect immediately.



## Event Assignment Edit

Event: 20-Chair Clinic

[return to event](#)

Assignment: Bucket Brigade Lead

All Professions? No

Question Sets

Last Update ORIANEL: 2/3/2016 5:21:57 AM

This assignment is scheduled for these event days

Update the rows below then press [save] to update them all at once.

[save](#)

Date	Type	Start	End	Max Vol	Public?	Use Wait List?	Vol Now	Waiting		(OADK#)
02/01/16	Set Up	09:00:00	18:00:00	3	<input type="checkbox"/>	<input type="checkbox"/>	0	0	<a href="#">delete</a>	1013
02/02/16	Clinic	06:00:00	18:00:00	3	<input type="checkbox"/>	<input type="checkbox"/>	0	0	<a href="#">delete</a>	1014
02/03/16	Clinic	06:00:00	17:00:00	3	<input type="checkbox"/>	<input type="checkbox"/>	0	0	<a href="#">delete</a>	1015

### What does the Use Wait List? Checkbox (shown above) do?

That checkbox, if set on, allows new registrations, or updates, to go onto a waiting list if the assignment is full. It does not prevent promotions, someone coming OFF the waiting list, if there are already volunteers on a waiting list.

### What does the Customer Setup "Maximum Waiting List" setting do?

This sets the maximum size of the waiting list slots per assignment. This is a system wide setting. After this count is reached for an assignment the volunteers will no longer be offered the waiting list for the assignment.

### How do I control the size of the waiting list differently by assignment?

There is no way to set different length waiting lists for different assignments.

### How do I promote the volunteers in order?

I have been registering volunteers for an event for a while and have the maximum set to 50 for the general volunteers. I have over 100 on the waiting list. If I change the maximum to 75 what happens?

If you set the maximum higher and there is a waiting list then the next time the system runs the automation promotion function it will automatically promote the volunteers in their order of registration for that assignment.

Volunteers can't "sneak in line" once you set the maximum down to 75. The automated promotion process will handle all this.

The reverse is not true. The system will not move people to the waiting list if you set the maximum allowed to a lower number.



## Change History

April 2020	<ul style="list-style-type: none"> <li>• Changes to email processing: <ul style="list-style-type: none"> <li>○ Changes to email bounce and spam processing.</li> <li>○ Resetting the Stop Email status.</li> <li>○ Bulk email processing speed enhanced</li> </ul> </li> <li>• The volunteer approval process has been enhanced.</li> <li>• Special access administrator status added to VoRIS. This allows you to define a subset of events a "host admin" may see. <ul style="list-style-type: none"> <li>○ The automation features have been enhanced to allow processing on this subset of events as well.</li> </ul> </li> <li>• The first and last names are now substituted, by default, in proper case. Example "Mike" instead of "MIKE".</li> <li>• The page allowing you to send messages by profession has been enhanced.</li> <li>• Enhancements to the Admin View page's volunteer search process.</li> </ul>



For any additional questions please email: [questions@TheSparkTeam.org](mailto:questions@TheSparkTeam.org)



Images from Auston James ©