User Guide
District Administrator

VOLY volunteer engagement platform

User Types

Tier 1 |District Administrators - THIS GUIDE
Tier 2 |Campus Staff Users
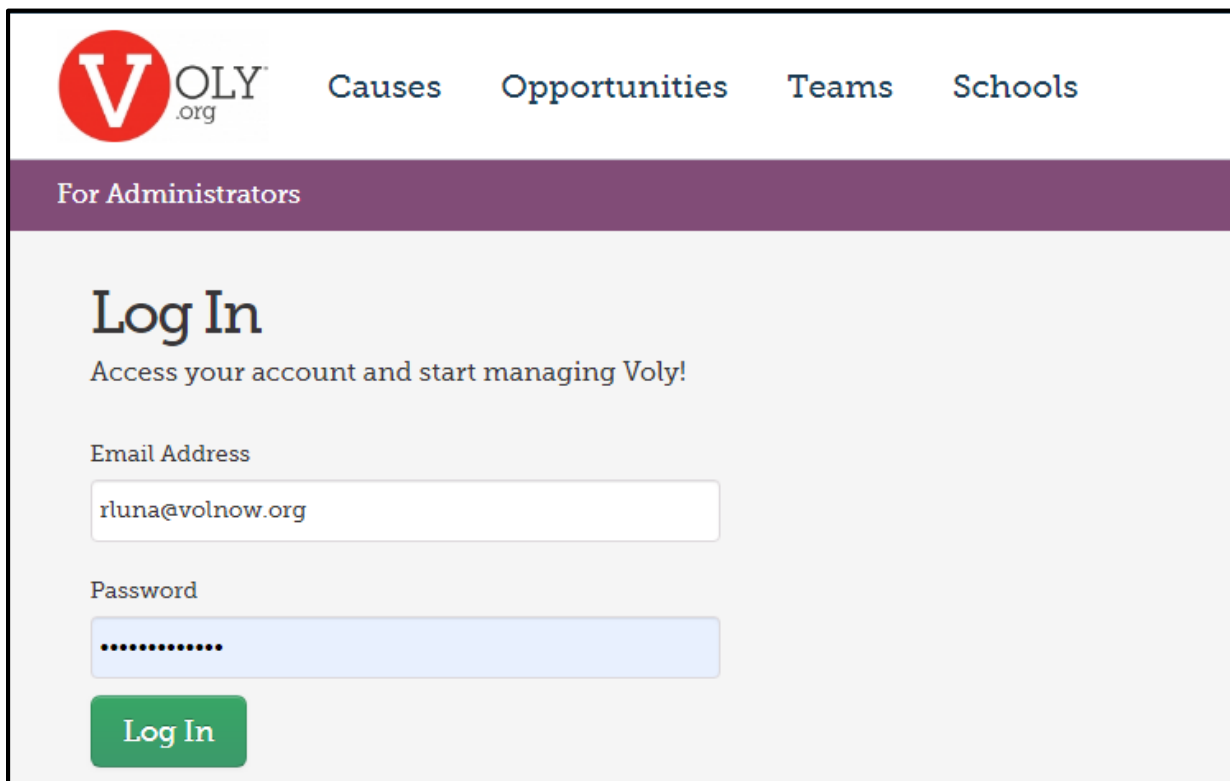**Tier 3** |The Volunteer User

Table of Contents

Log-in to your district administrator account

- Go to your district VOLY portal. Example: https://[schooldistrictname].voly.org
- Add "/manage" to the end of the URL.
- Make sure the full-width purple "For Administrators" bar is below your district's logo
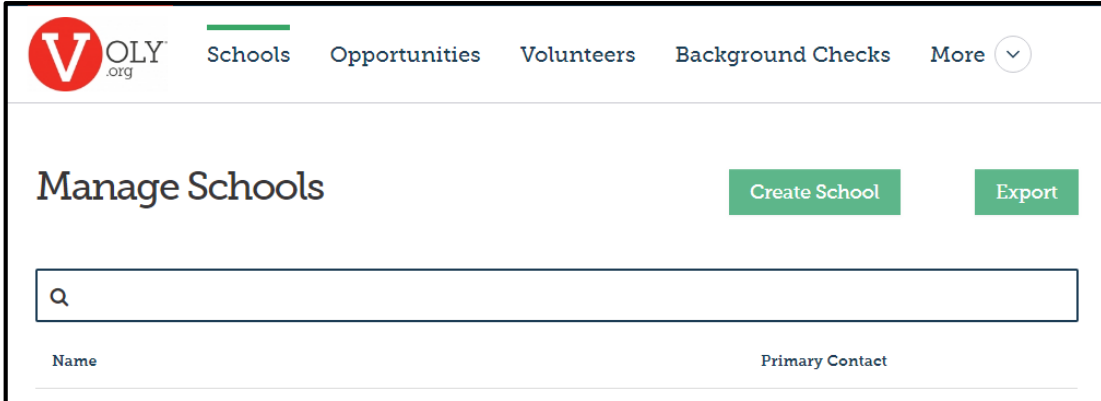- Enter your credentials and hit "Log In"

Adding a school or department

Prior to adding a school or department, gather the following information: school/department name, mission statement, address, primary contact's name and email, logo, and any other campus-specific information you require, such as trustee district, etc.

From the dashboard (/manage URL), click on "Schools", then the green "Create Schools" button.

· Complete all required fields, then the green "Add Agency" button to save changes.
· Click "View Them Now'"from the notification bar:

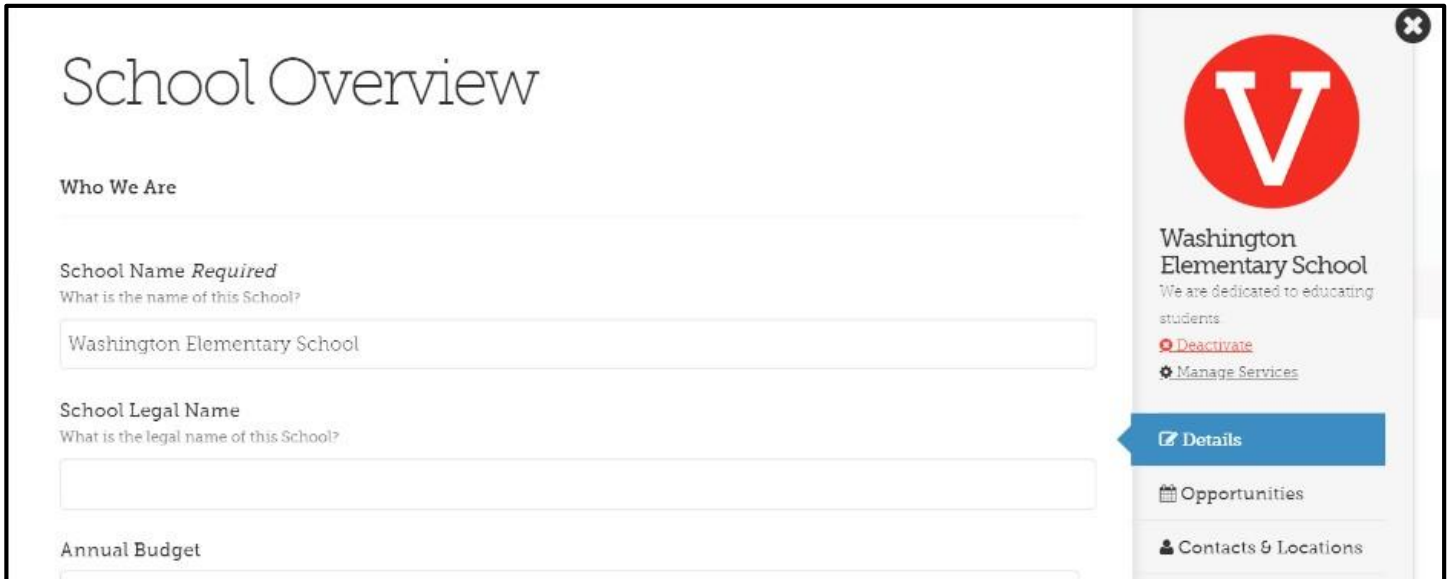All schools awaiting verification will appear on the list. Click "Approve", and the message bar will confirm the school has been approved.

Managing school or department services

· From your dashboard, choose "Schools".
· Use search bar to locate school you just created or the one you want to edit.
· When the school appears, click on the underlined school name.
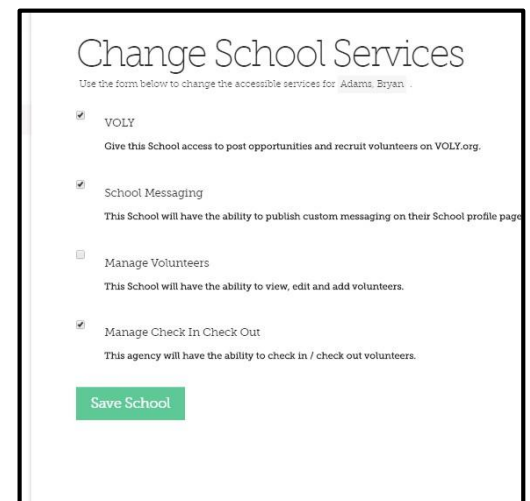
· Click "Manage Services".
· Click on the appropriate boxes to activate selected services for this school.
· "Manage Volunteers" provides this school with access to all district volunteers, not just those who are
  Fans of their school.
· Click "Save School" to save your changes.

Add school or department details

· Click on "Details" in School Overview sidebar.
· Update all school information.
· Add school logo.
· Click "Save School".

Add school or department contacts

- Choose "Contacts & Locations" from the School Overview sidebar
- Click "Add Contact"
- Enter the name, email address and phone number of the new contact
- Select type of contact.
- Provide permission to the view and manage the necessary features and services
- Permissions will vary depending on the scope of work assigned
- To provide access to VOLY, click the box at the bottom of the form (It will change from red to green)
- Click "Save Contact".
- **Note**: "Check In Check Out Kiosk Only" is only for the Kiosk. It should not be selected for any other user

Add Contact
Use the form below to add a new contact.

Name

Email Address

Phone

Contact Type
- ☐ Volunteer Coordinator
- ☐ Parent Instructor
- ☐ Principal
- ☐ Office Manager
- ☑ Community Liaison

Permissions
- ☑ Create And Edit Opportunities
- ☑ Delete Opportunities
- ☑ Access Opportunities
- ☑ Manage Volunteers
- ☑ Track Hours
- ☑ View Fans
- ☑ Update Agency Details
- ☐ Manage Membership
- ☑ Manage Contacts And Access
- ☑ Manage Locations
- ☑ Manage Shifts
- ☑ Agency Notifications
- ☐ Billing Notifications
- ☐ Check In Check Out Kiosk Only

❌ **Give Access To Voly!**
Allow this contact to login to Voly for your school.

Save Contact or cancel

Activate Contact

Every contact must be activated before they can access and use their VOLY account.

- Select "Contacts & Locations".
- Find the contact you want to manage.
- Click on the gear icon.
- Change "Validated email address" to "Yes."
- Create a password.
- Click "Save Contact".

Manage Contact Status

Use the form below to manage agency contact for Jones Blanton Smith Elementary .

Status

Active ▼

Validated Email Address

Yes ▼

Has Voly?

Yes ▼

Password

Leave blank for the same password.

Save Contact

Jones Blanton Smith Elementary
test
✪ Deactivate
⚙ Manage Services
✚ Create An Opportunity

✎ Details

📅 Opportunities

👤 Contacts & Locations

📄 Notes

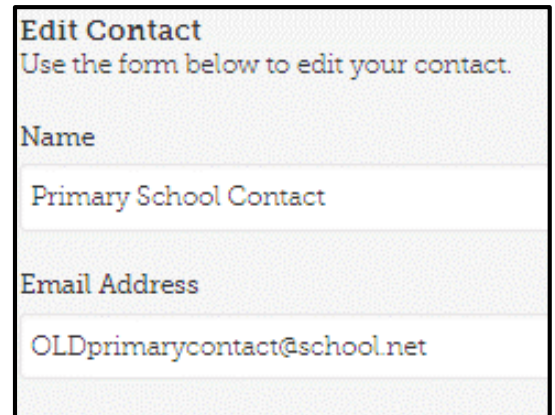📄 Transactions

📄 Documents

Disable a school or department

In the School Overview sidebar, click the red "Deactivate" text underneath the school or deparment name. This will remove the school/department from all areas of your VOLY site. ALL opportunities for this school or department will also be removed from VOLY. **They are not *deleted***, only removed from all display screens until reactivated.

To disable a contact

A user's email address controls their access to VOLY, and each email address can only be used for one school or department. When you delete a contact, their email address is "frozen" and cannot be used at another VOLY location. To prevent locking out a user, we recommend you edit and alter the email address prior to deleting a contact.

In the School Overview sidebar, click on "Contacts & Locations" and search for the contact you want to disable. Click on the pencil icon to edit the contact.

· Add the word OLD in front of the contact's email address.
· Click "Save Contact".
· Now click the "X" icon below the user's name to disable the contact at this school.
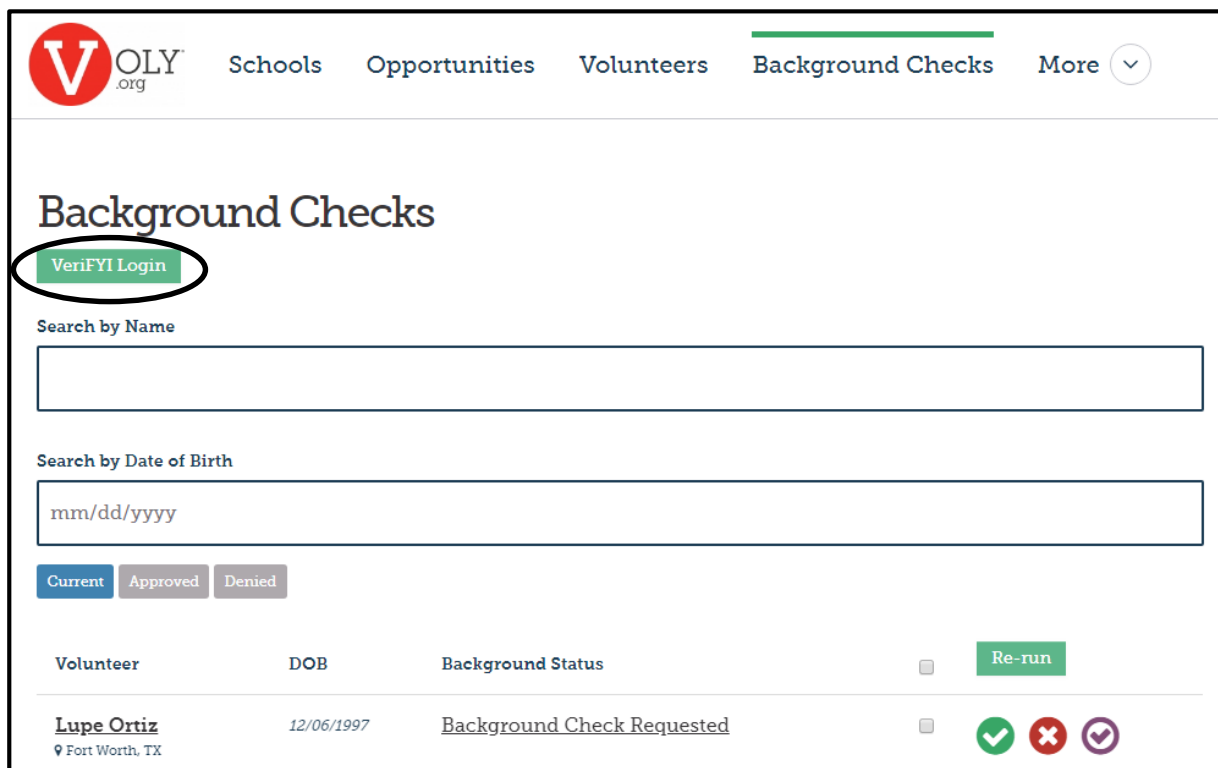· **Remove the word "OLD" to re-enable a disabled contact.**

Edit Contact
Use the form below to edit your contact.

Name

Primary School Contact

Email Address

OLDprimarycontact@school.net

Managing background checks

·Click "Background Checks" on your district dashboard.
·The green button is a link to your background provider website
·Click on Background Status to add Notes and see other details about background check
·Click on either icon to change clearance status

Creating Awards for Volunteers

Click on "Awards System" in the grey menu box on your Admin dashboard
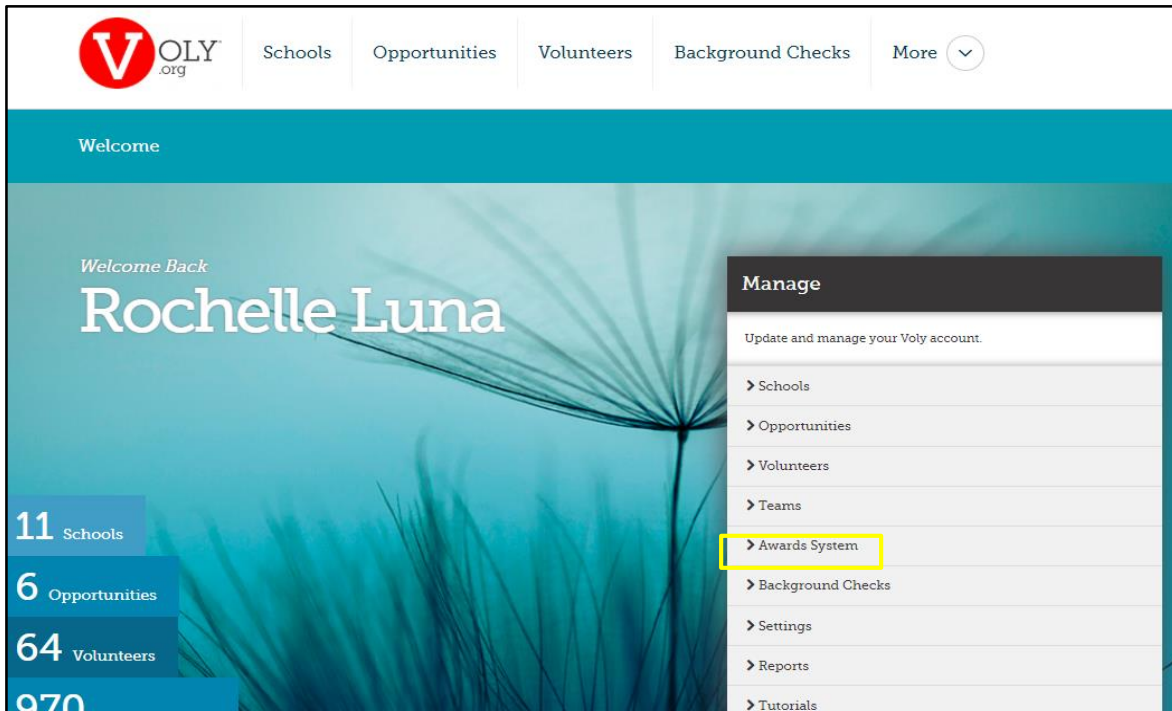
Complete all required information

Note: Start Date and End Date will include all hours earned with the two dates

Awards System

Manage your Awards System.

Add Levels.

Level Name*

Minimum Hours Required*

Congratulatory Greetings!*

Start Date*

MM/DD/YYYY

End Date*

MM/DD/YYYY

- Put your cursor over the "V" to see the pencil icon appear and click on it
- Click on the "Select A Picture" button
- Select the picture you want to upload
- Click on the green Save button
- You will see a message in the blue banner that says, "Award level was successfully created"
- You will also see a list of all awards created below
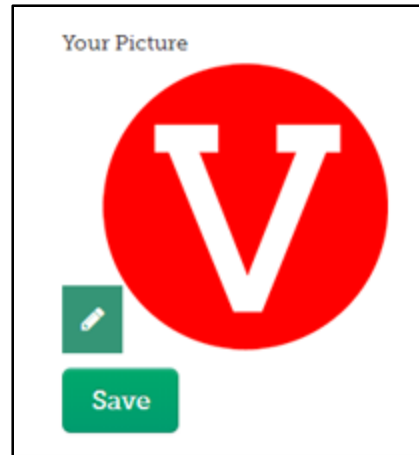
**Awards cannot be edited once a volunteer has earned the award**

Your Picture

End Date*

05/31/2020

Your Picture

Save

Name	Hours	Description	Start Date	End Date	Actions
test level	5	Congrats	02/28/2019	02/28/2019	In Use
Bronze Level	20	Congratulations on Achieving Bronze Level!	05/01/2020	05/15/2020	✏ ✖
Level 1	5	Congrats	05/01/2020	05/31/2020	✏ ✖

Settings

Click on 'Settings' in the gray menu box on your dashboard
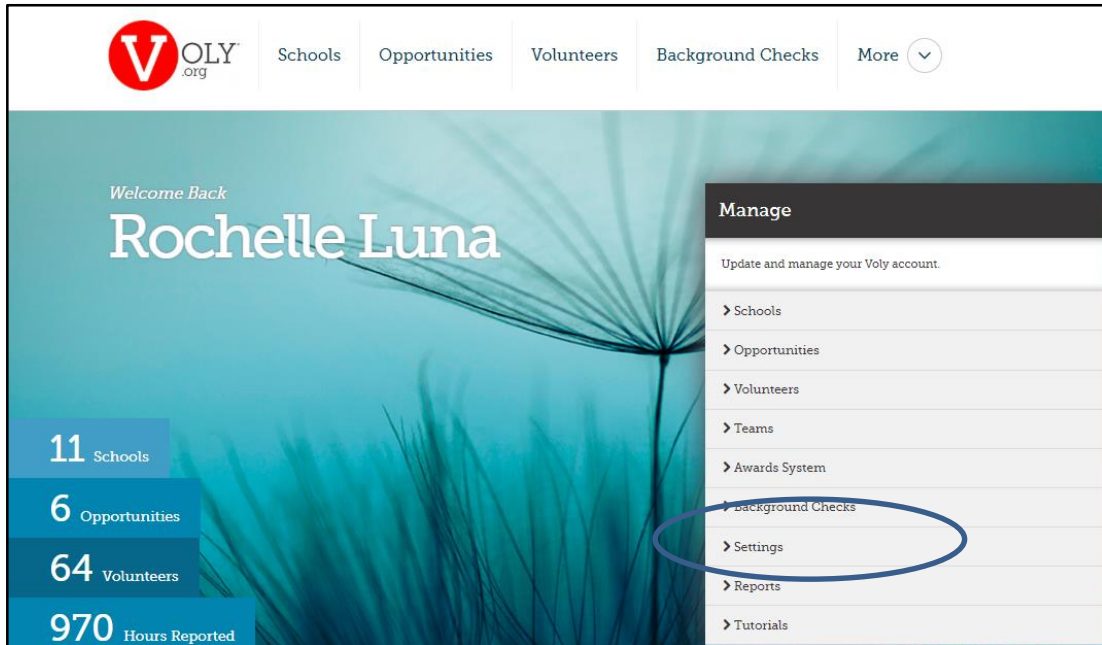
You will see general information from your district that is displayed on your VOLY site. As an Admin, you may change settings as needed.
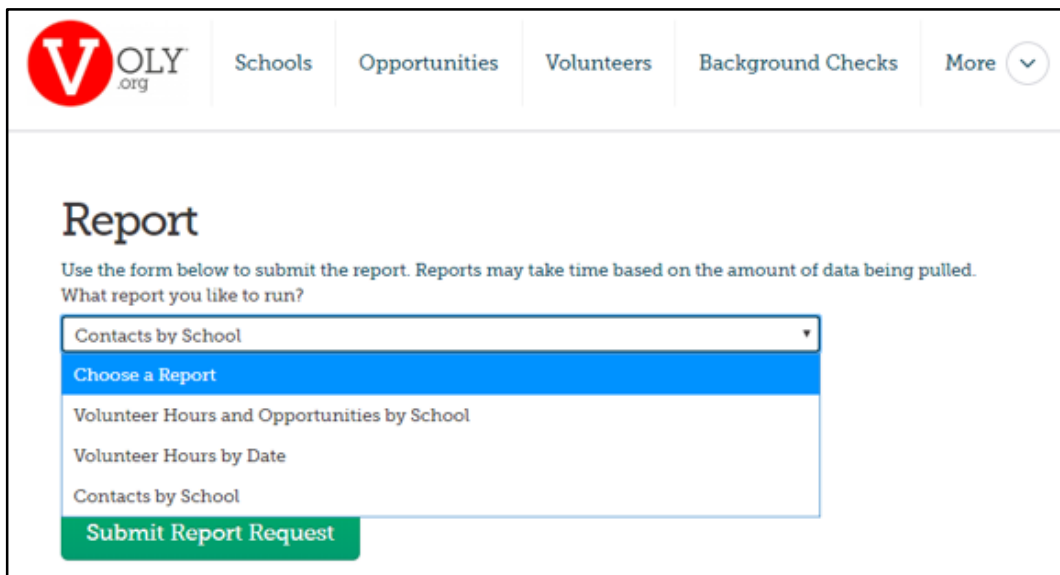
Reports

From your dashboard, click on 'Reports' in the gray menu box
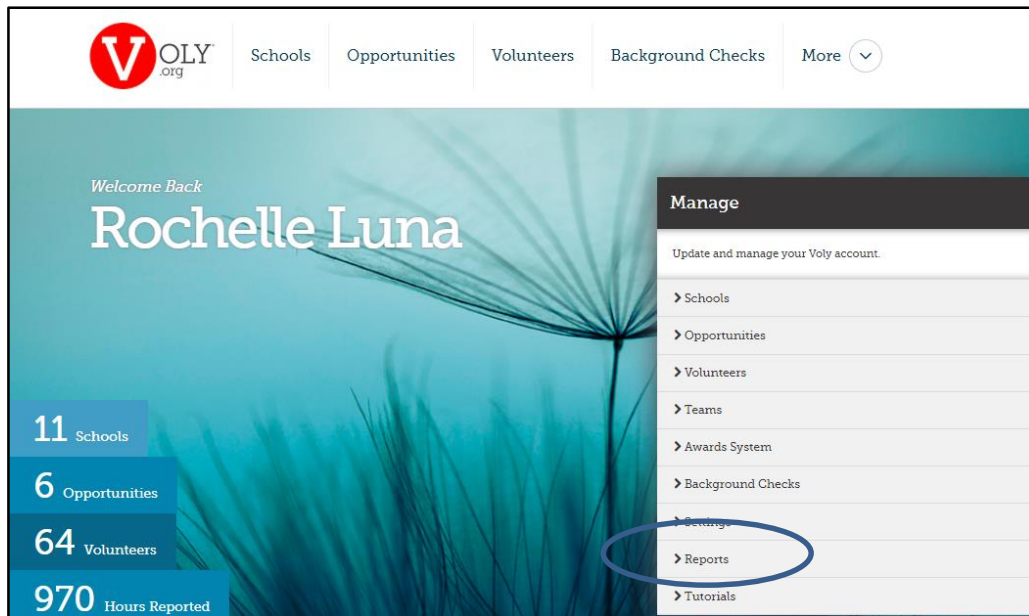
- You may click on the drop down box to select a report
- Enter criteria and select dates (if applicable)
- Then click on the green 'Submit Report Request' button
- Report may take a moment to run. (Some reports may take longer, pending the amount of information being pulled

11

How to use 'Volunteers' Search

From your dashboard, click on 'Volunteers' to manage volunteers for your district
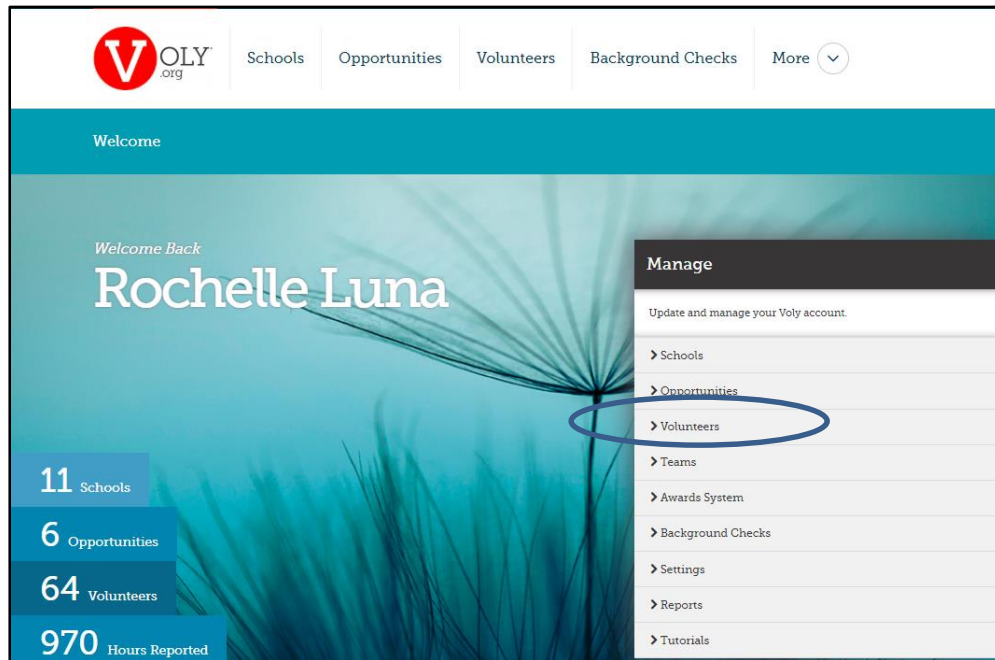
- As an Admin you have the ability to search for volunteers from the whole district
- You may search for a volunteer using the search boxes
- There are tabs below the search boxes to choose which categories you want to search from
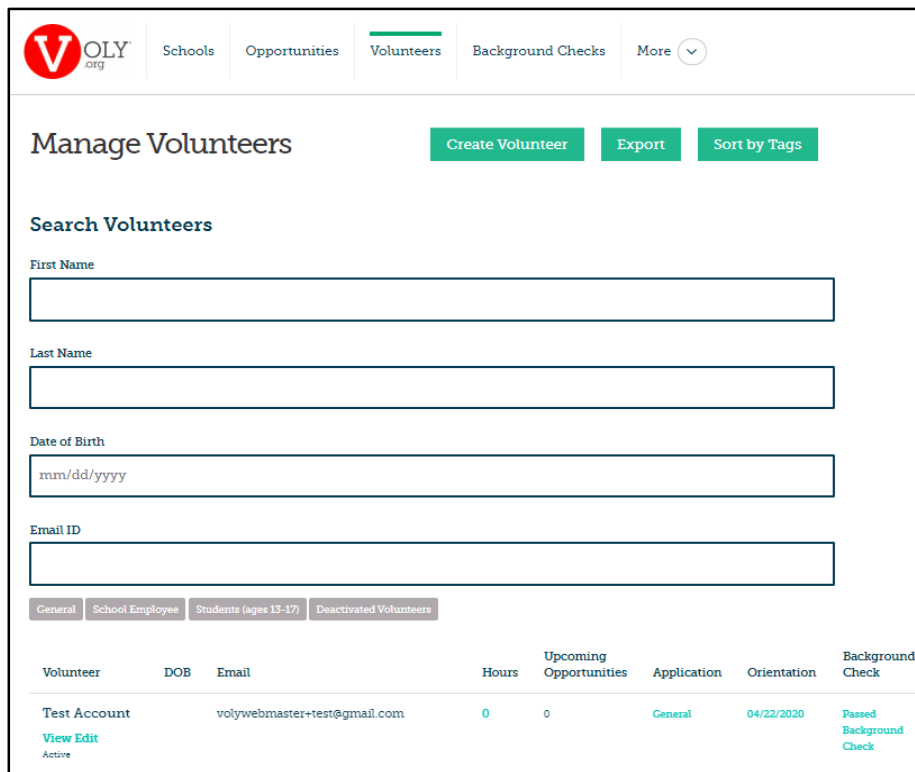
Tutorials

From your dashboard, click on 'Tutorials' in the gray box

- Here you will find tutorials to help you navigate through VOLY
- As new tutorials and videos are created, they will be uploaded in the 'Tutorials' section