



User Guide

District Administrator

all-in-one volunteer solution

schools@voly.org

VOLY volunteer engagement platform



User Types

Tier 1 | District Administrators - **THIS GUIDE**

Tier 2 | Campus Staff Users

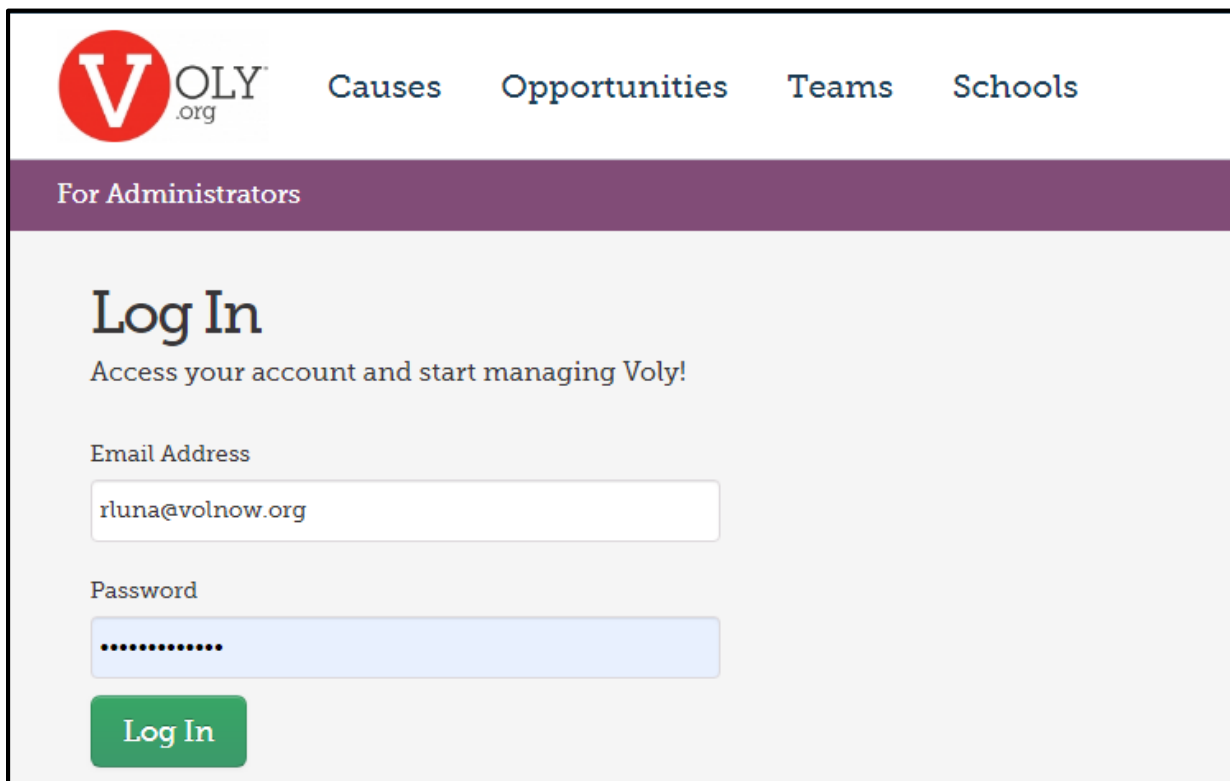
Tier 3 | The Volunteer User

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Log-in to your district administrator account

- Go to your district VOLY portal. Example: [https://\[schooldistrictname\].voly.org](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”

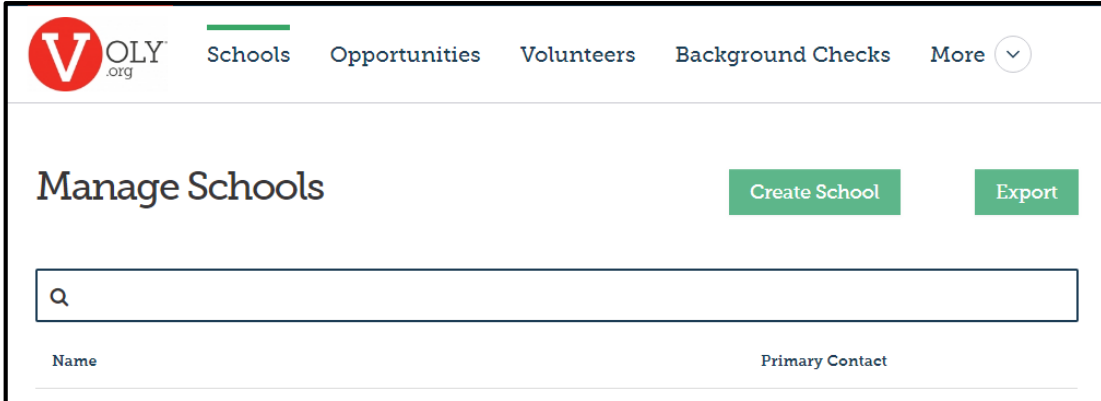


The screenshot shows the VOLY administrator login interface. At the top left is the VOLY.org logo, a red circle with a white 'V'. To its right are navigation links: Causes, Opportunities, Teams, and Schools. Below these is a purple horizontal bar with the text "For Administrators". The main content area has a light gray background and contains the heading "Log In" in a large, dark font. Below the heading is the subtext "Access your account and start managing Voly!". There are two input fields: "Email Address" with the value "rluna@volnow.org" and "Password" with a masked password of ten dots. A green "Log In" button is positioned below the password field.

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.



The screenshot shows the 'Manage Schools' page. At the top left is the V.OLY.org logo. The navigation menu includes 'Schools' (highlighted with a green underline), 'Opportunities', 'Volunteers', 'Background Checks', and 'More' with a dropdown arrow. The main heading is 'Manage Schools'. To the right of the heading are two green buttons: 'Create School' and 'Export'. Below the heading is a search bar with a magnifying glass icon. At the bottom, there are two columns labeled 'Name' and 'Primary Contact'.

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

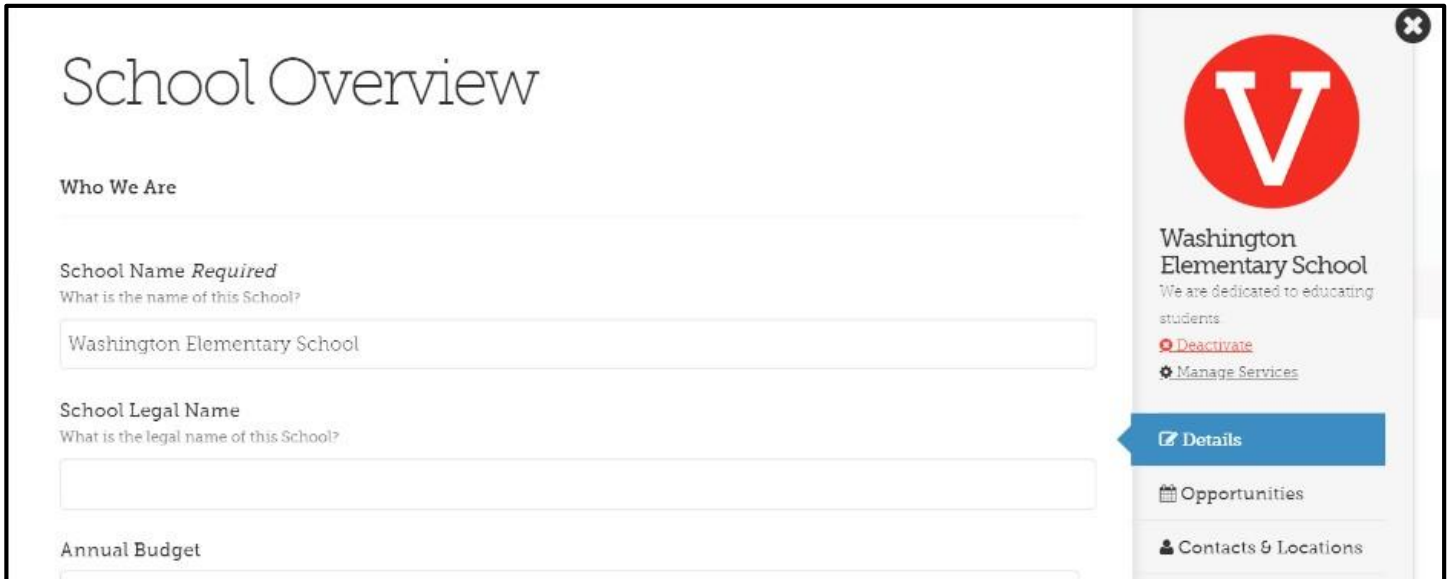


The screenshot shows a notification bar with a blue background. The text reads: "Your agency has been added successfully." Below this, there is a red notification bar with the text: "You Have Schools Awaiting Verification" and "You currently have 1 Schools awaiting verification." A yellow box highlights the "View Them Now >" link.

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.

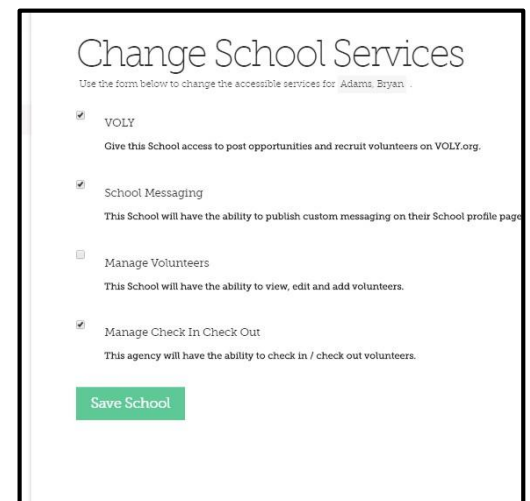


The screenshot shows the 'School Overview' page for Washington Elementary School. The main content area has a heading 'School Overview' and a section 'Who We Are' with three input fields: 'School Name' (containing 'Washington Elementary School'), 'School Legal Name', and 'Annual Budget'. A sidebar on the right features a red circular logo with a white 'V', the school name 'Washington Elementary School', a mission statement, and links for 'Deactivate' and 'Manage Services'. Below these are buttons for 'Details', 'Opportunities', and 'Contacts & Locations'.

- 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”.



The screenshot shows the 'Change School Services' page for Adams Bryan. It contains a list of services with checkboxes: 'VOLY' (checked), 'School Messaging' (checked), 'Manage Volunteers' (unchecked), and 'Manage Check In Check Out' (checked). Each service has a brief description of its function. A green 'Save School' button is at the bottom.

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.

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

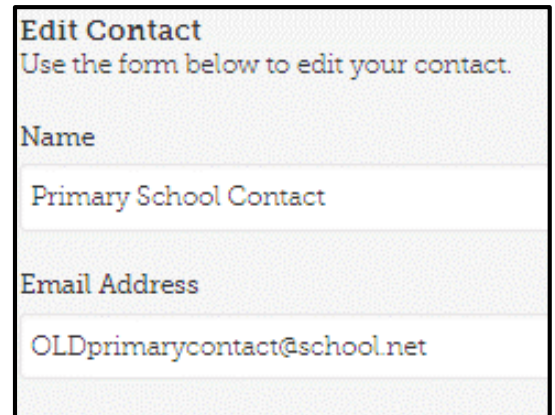
In the School Overview sidebar, click the red “Deactivate” text underneath the school or department name. This will remove the school/department from all areas of your VOLY site. ALL opportunities for this school or department will also be removed from VOLY. **They are not *deleted***, only removed from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



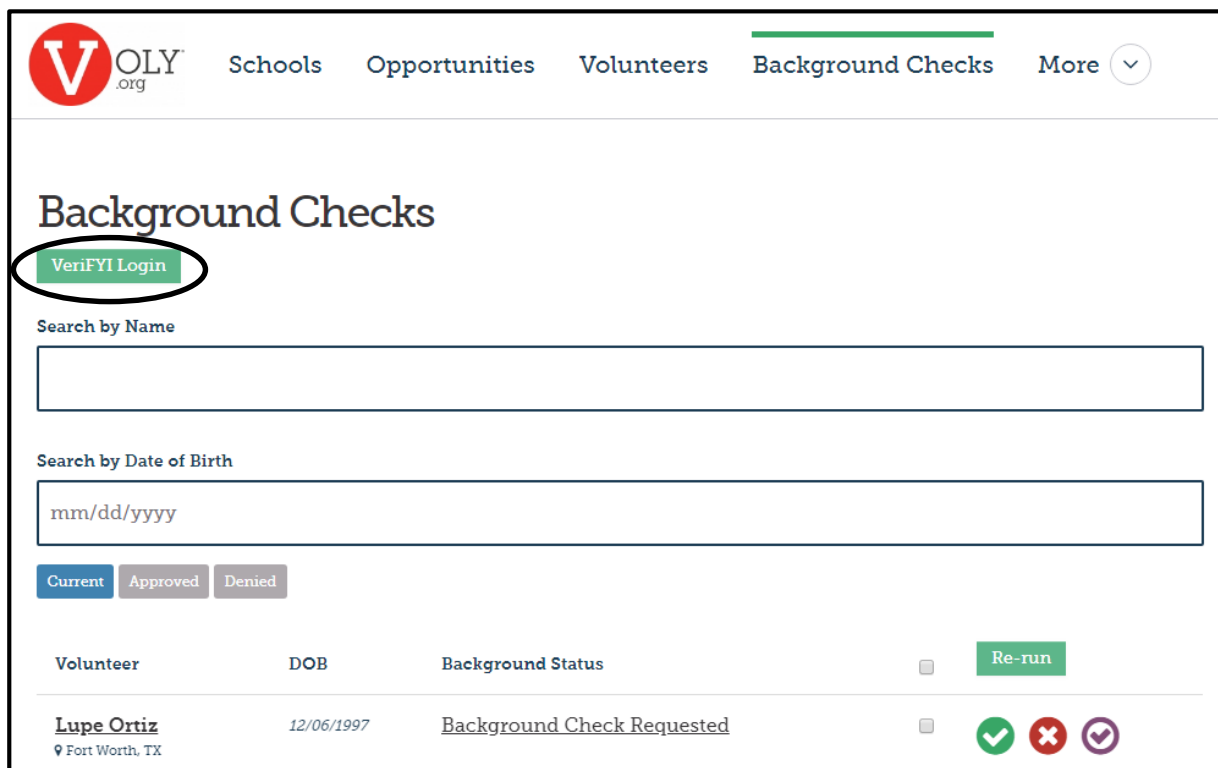
Edit Contact
Use the form below to edit your contact.

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



VOLY.org

Schools Opportunities Volunteers **Background Checks** More

Background Checks

VeriFYI Login

Search by Name

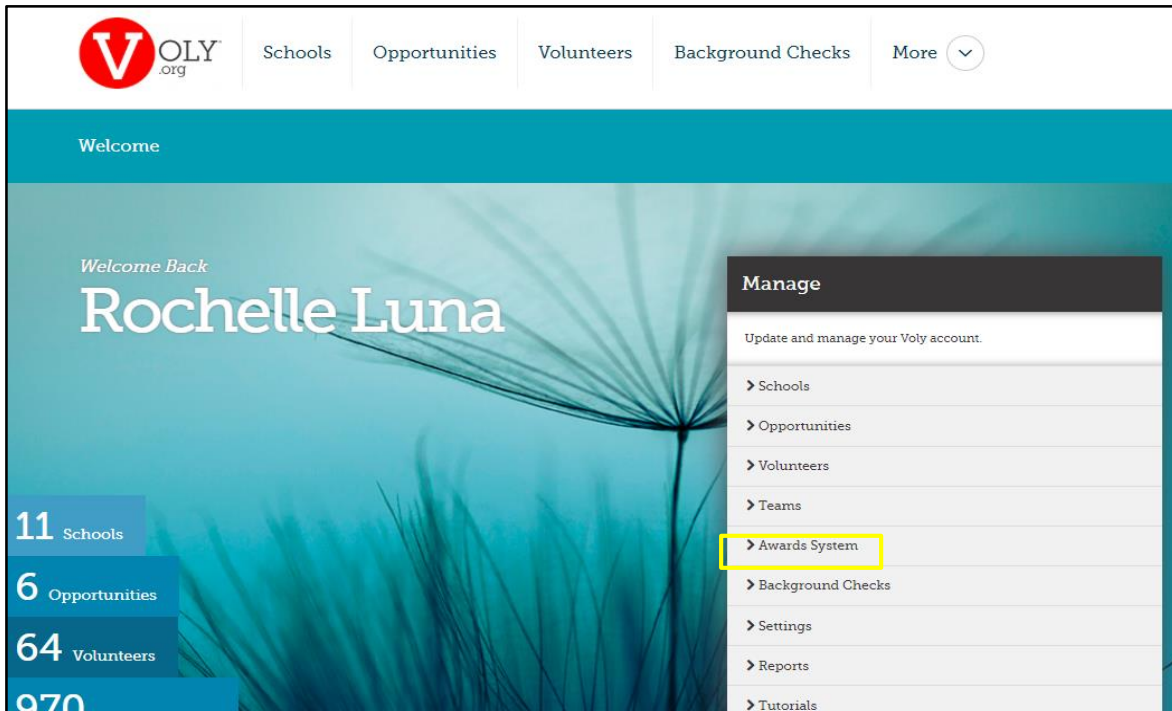
Search by Date of Birth

Current Approved Denied

Volunteer	DOB	Background Status		Re-run
<u>Lupe Ortiz</u> Port Worth, TX	12/06/1997	<u>Background Check Requested</u>	<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

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*

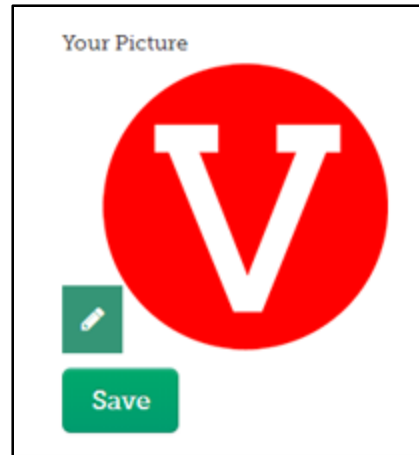
Minimum Hours Required*

Congratulatory Greetings!*

Start Date*

End Date*

- 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

End Date*

05/31/2020

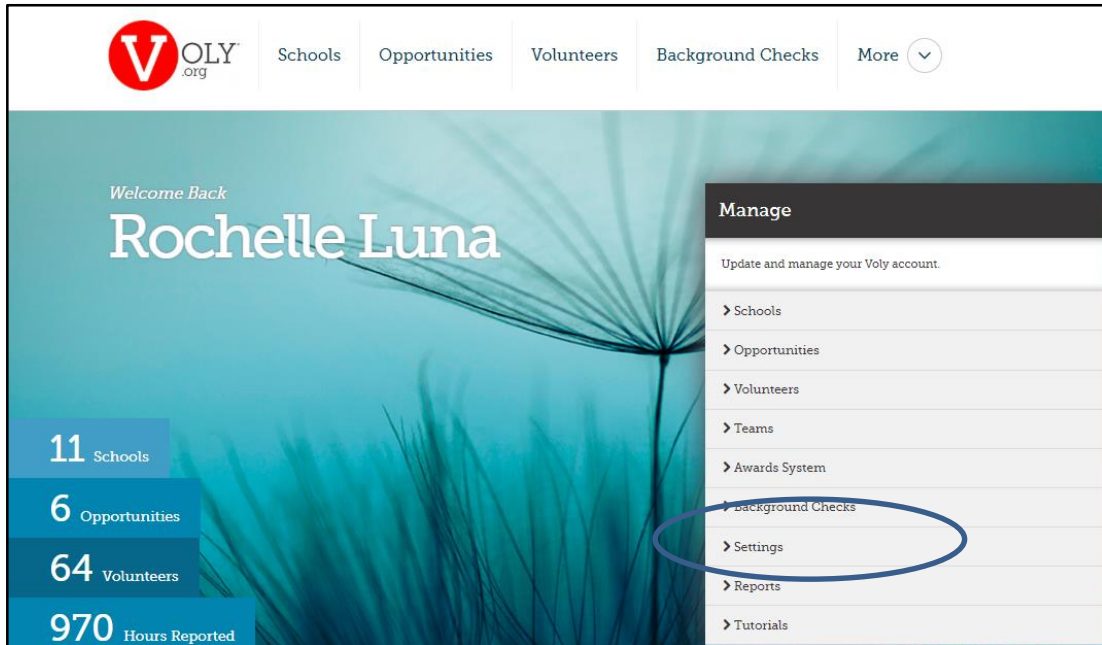
Your Picture

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.

MANAGE SETTINGS

Settings

Settings

Note: Updates to this section will be reflected on your site.

Who Are You?

Company Name*

Address

City

State

Zipcode

Phone

Logo Best size (148 x 68)



Hero Image Upload Best size (1800 x 1200)



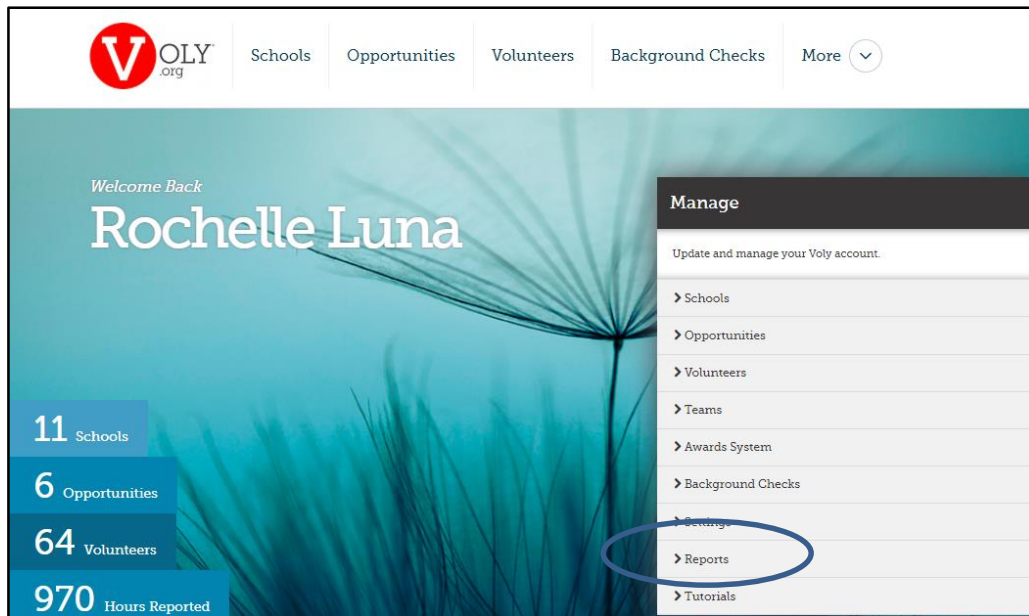
Hero Image Focal Point

Hero Home Content

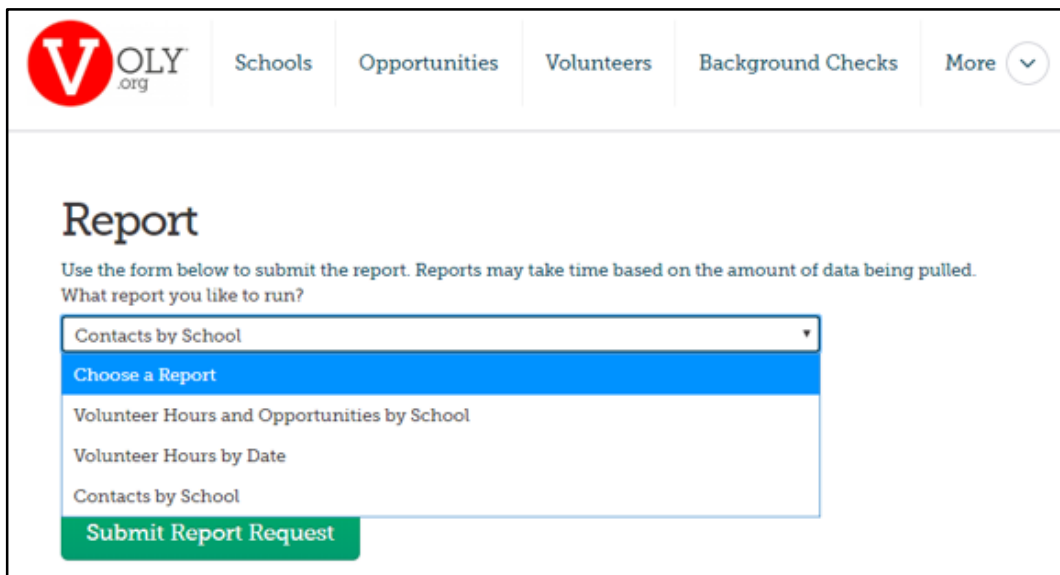
Save Settings

Reports

From your dashboard, click on 'Reports' in the gray menu box

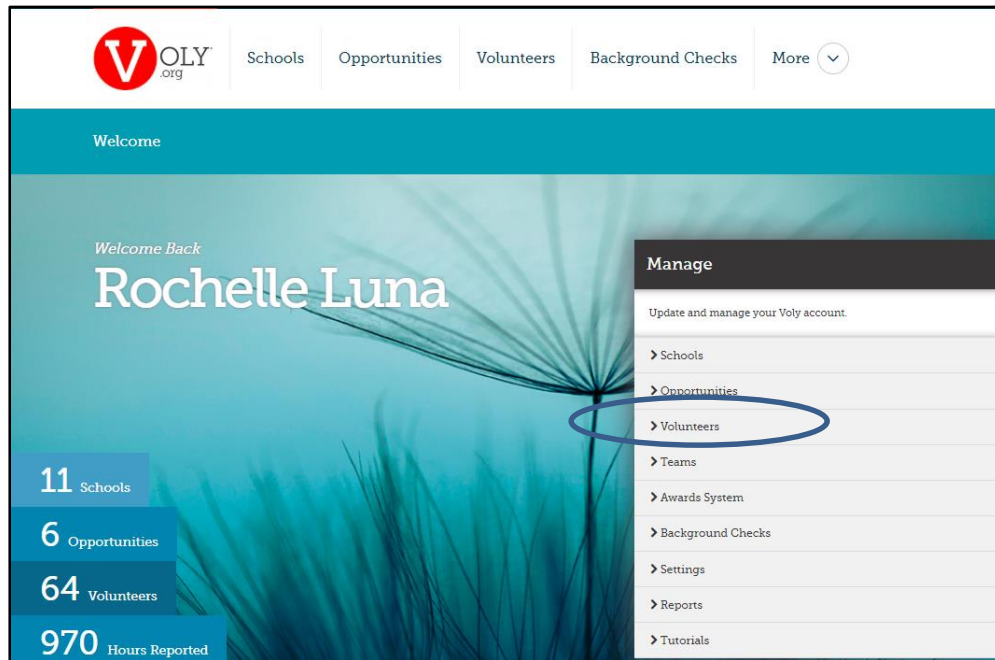


- You may click on the drop down box to select a report
- Enter criteria and select dates (if applicable)
- Then click on the green 'Submit Report Request' button
- Report may take a moment to run. (Some reports may take longer, pending the amount of information being pulled)

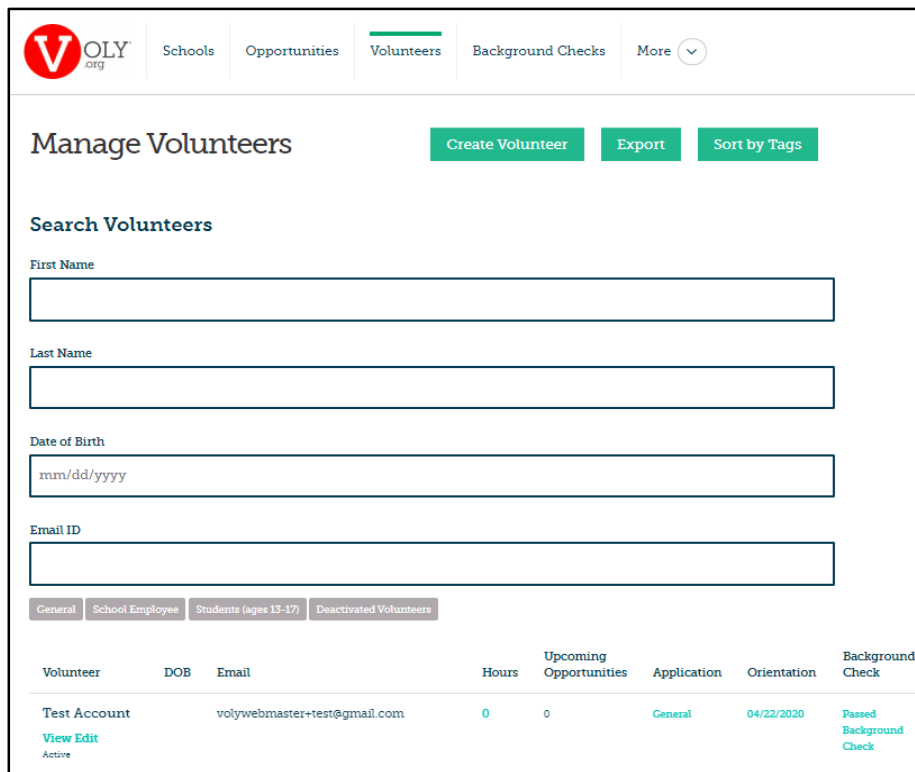
A screenshot of the 'Report' form in the Voly.org dashboard. The form is titled 'Report' and includes a sub-header: 'Use the form below to submit the report. Reports may take time based on the amount of data being pulled. What report you like to run?'. Below this is a dropdown menu with 'Contacts by School' selected. A blue bar highlights the 'Choose a Report' section, which lists three options: 'Volunteer Hours and Opportunities by School', 'Volunteer Hours by Date', and 'Contacts by School'. At the bottom of the form is a green button labeled 'Submit Report Request'.

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

