OFFERO Administrator Help

General

IMPORTANT: All administrators are privy to some personal information of all users in the system.

Help ?

Help can be found throughout the system anywhere you see the question mark icon. This documents is also available in the More navigation.

Admin

The admin side of the application is only available to users within the different staff groups.

- If a user is in an admin group an "Admin" tab will be visible in the black primary navigation
- When selected the admin navigation will be visible.
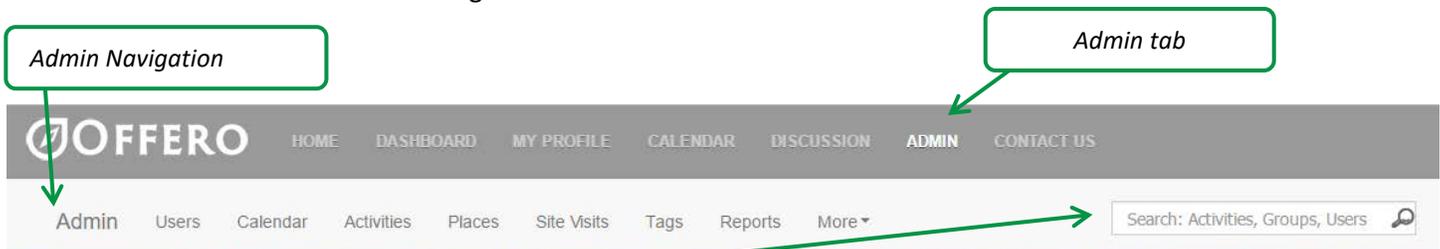
Master Search

The search box in the admin navigation allows you to search for Activities, Groups, Places, Users and Volunteers. Start typing in the box and matching results will be displayed. Click on the item that you want.

Email Addresses

When a single email address is displayed in the admin clicking it will open the default email client (Outlook, Gmail) on your computer. When the "email" link is visible it will use the email system within the application.
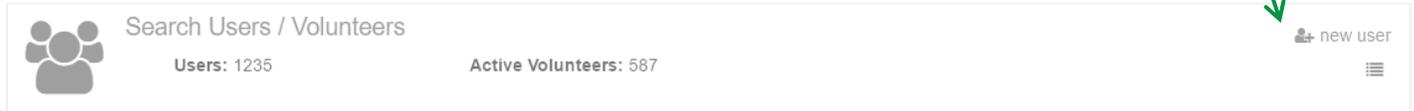
Users

The term user refers to any person using the application. This can be the public, volunteers, admin, etc. A user's information and groups can be managed from the user profile. The users screen loads filtered down to active volunteers. Un-check 'Only Search Volunteers' to view all users.

Add New User

Adding a user to the system can be accomplished one of two ways.

- Signing up on the login form (*General Public*)
- Through the Admin system
    1) Go to the Users screen
    2) Click the New User Link

Add New User

Search Users / Volunteers
Users: 1235   Active Volunteers: 587

&+ new user

Last Name Filter: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All

3) Enter Required information
   ▪ First & Last Name
   ▪ Email Address
   ▪ Primary Phone
4) *Note: User will receive an email informing them an account has been created. They will have a link in the email to set their password.*

## Delete User

Only super admin users can delete another user.

1. From the User Profile
2. Scroll to the bottom of the screen
3. Click Delete button
4. *Note: this cannot be undone*

Groups

Company groups are groups of people or organizations that complete volunteer hours as a group with your organization.

Add New Group

1. From the Groups screen
2. Click the New Group Link

Groups Navigation

New Group
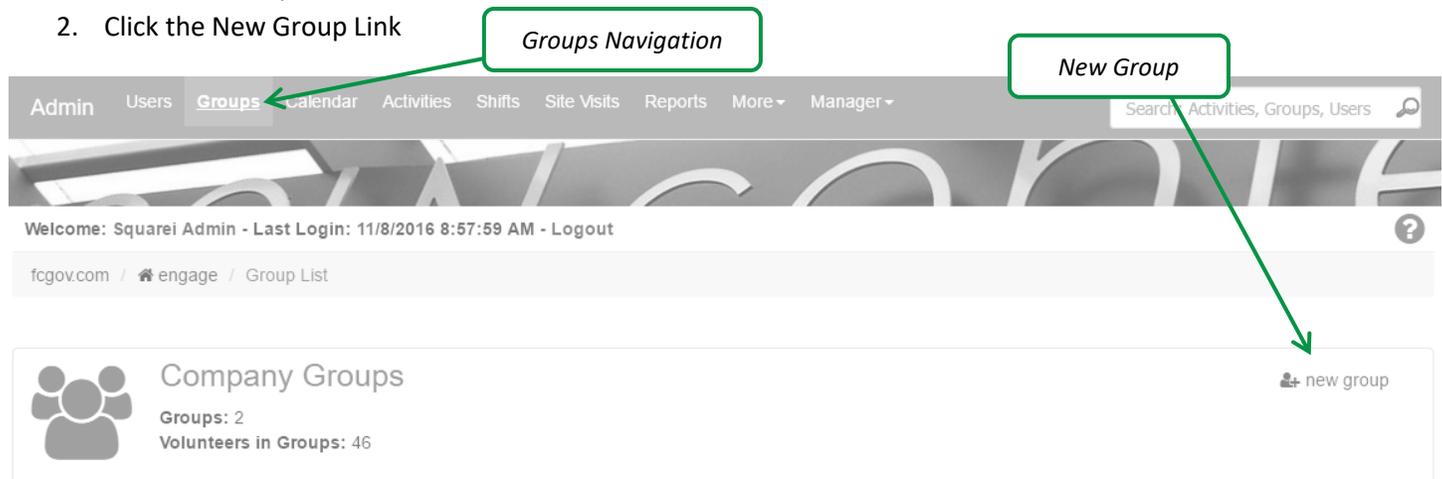
Admin   Users   **Groups**   Calendar   Activities   Shifts   Site Visits   Reports   More▾   Manager▾   Search Activities, Groups, Users

Welcome: Squarei Admin - Last Login: 11/8/2016 8:57:59 AM - Logout

fcgov.com / 🏠 engage / Group List

Company Groups
Groups: 2
Volunteers in Groups: 46

&+ new group

3. Enter required information
   a. Group Name
   b. # of people in the group

Group Profile

The group profile displays information about associated users, activities, site visits and documents.

1. Profile Tab:
    a. Upcoming/Previous Activities – displays activities the group is participating in.
        > **Note: Only admin users can sign groups up for activities.*
    b. Associated Users – pick users already in the system to be associated with the group.
        > **Note: The first user selected will be the primary contact. Primary Contacts will receive feedback requests and can complete site visits for the group.*
    c. Basic information about the group
2. *Volunteer Tab:*
    a. *Recent Misc Volunteer Activity – these are hours outside normal types in the system*
    b. *Upcoming/Previous Site Visits for the group*
        > **Note: Site visits for groups must be scheduled from the group profile*
    c. Assigned Site Visit types allow site visits to be created for the group and the Primary contact is able to complete these as well.

3. *Documents Tab*
    a. *Documents uploaded for the group, i.e. group waivers, agreements, etc.*

Calendar

The admin calendar shows all activities by default. There are different filter parameters between the admin calendar and the public calendar.

- To show site visits or shifts on the calendar click the advanced search options and the Site Visits or shifts in the result types.
- Help needed will show activities or shifts that have open assignments.
- Activities with NO volunteer slots will show activities that do not have any assignments for Volunteers to sign up for.

Activities

Activities are events, training, projects that require volunteer or public participation. Activity information is managed on the activity profile. Volunteers will only be able to sign up for activities if their volunteer group is associated with a position for the assignment and their assigned group has the 'Can Do Activity' security role.

Add New Activity

1. From the Activities Screen
2. Click the New Activity Link

3. Enter required information
   - Title (Name of Activity)
   - Date (Start & End)
4. *Note: The activity will be saved in Draft status. Draft activities are only visible to admin users.*

Edit Activity Details

1. From the Activity Profile
2. Click the edit links to edit details
   - Basic Info
     i. Status – Dictates if the activity is ready for volunteers/public signup
        1. Only visible when set to Approved
     ii. Visibility – Dictates who sees the activity on the calendar
        1. Public – Public users as well as volunteers see activity
        2. Private – Only Volunteers that can help see activity
     iii. Registration Deadline – Entering a date makes the activity require registration, participants cannot sign up after date entered
     iv. Max Participants – Limits the number of participants that can sign up, users can sign up for the waitlist after the max is met
   - Activity Contact
     i. Visible to public and volunteers

1. Only Admin users for the organization can be assigned as the contact
3. Create assignments for Volunteers
   - Click the add button in the assignments section

   Unfilled Assignments ❓ + add

   - Enter assignment details

Manage Available Assignments   ✕

Position

Quantity* ❓	Position* ❓	Description* ❓	Start Time*	End Time*	Hours Earned*
1	All Volunteers ▾	Assist Program	07:00 am	09:30 am	2.5
1	▾	Lead Program	07:00 am	09:30 am	2.5
					➕add

All details entered will be visible to volunteers

Cancel   Save

   - The position dictates which volunteers can help with the assignment.
   - Click Save
4. Enter any volunteer Notes

Add user as participant to activity

Add Participant

1. From the Activity Profile

➕ add ☰ Participant List

Registrations

Reg. Date	Name	Email	Phone	# in Group

0 registered

2. Click the "+ add" link within the registrations section
3. Enter # in group
4. Search for participant
5. Click Save
6. **Note: User will receive thank you for signing up/registering for activity email.*

Add user as volunteer to activity

1. From the Activity Profile

2. Click on the fill assignment icon for the position you want the volunteer to fill
    **Note: Assignment details can be edited by clicking the pencil icon*
3. Search for the volunteer in the drop-down
    a. Volunteer must be in appropriate group for the position
        i. *Example: One-day volunteer cannot fill a long-term volunteer position*
        ii. *Can't find the volunteer you're looking for? Make sure their status is set to "Active" and they are in the appropriate group.*
4. *Click Save*
5. ***Note: User will receive thank you for signing up to help with activity email*

Special Program Configuration

Use the details below to configure a Special Program

1. Create new Activity with Group Name in Title
2. Basic Info Settings
    • Status: **Approved** after your finished setting up
    • Visibility: **PRIVATE**
3. Create Assignments with details
    • Once activity is approved Volunteers can sign up
4. Manually add requestor as a participant *See Add user as a participant to activity section*
5. *Note: User will receive thank you for signing up email as well as a request for Special Program Feedback.*

Delete Activity

Only admin users can delete activities.

1. From the Activity Profile
2. Scroll to the bottom of the screen
3. Click Delete button
4. *Note: this cannot be undone*

Shifts

Shifts allow volunteers to sign up to help with consistent recurring assignments. A shift can be assigned to one or multiple volunteers. Volunteers will only be able to sign up for shifts if their volunteer group is associated with a position for the assignment and has the 'Can Do Shift' security role.

Add a New Shift

1. From the Shifts Screen
2. Click on the New Shift link
3. Enter the required information
    - Title
    - Place

Delete Shift

Only admin users can delete shifts.

1. From the Shift Profile
2. Scroll to the bottom of the screen
3. Click Delete button
4. *Note: this cannot be undone*

Site Visits

Site Visits allow volunteers to sign up to help on assignments without a specific date or time. Volunteers will only be able to complete site visits if their volunteer group is associated with a position for site visit types and has the 'Can Do Site Visit' security role. Very helpful allowing volunteers to complete field reports.

Add a New Site Visit

Most of the time users will schedule and manage their own site visits.

1. From the Site Visits Screen
2. Click the New Site Visit link
3. Select the type of site visit
   - The type drives the list of users and the contact types
4. Enter required information
   - User (Filtered based on groups)
   - Place
   - Date/Time
5. Click Save
6. *Note: User will receive schedule confirmation and reminder emails*

Delete Site Visit

The public as well as admin users can delete site visits.

1. From the Site Visit Profile
2. Scroll to the bottom of the screen
3. Click Delete button
4. *Note: this cannot be undone. Public users can only delete site visits in the future or less than 14 days in the past.*

Volunteer Applications

Applicants will submit a volunteer application through Engage, setup by each department. Departments can create an unlimited number of applications. Applicants will use the link to the application form on the department's landing page, engage.fcgov.com/d/DepartmentAbbreviation (under buttons) and fill in the form.

1. Staff will receive an email that the application has been submitted, configured on the volunteer application.
2. The volunteer gets a confirmation at the top of their dashboard, saying that staff will be in touch with them soon.
3. The Volunteer Status in the application will automatically be set to applicant, unless the volunteer is already in Engage and their status set to something else *(i.e.: active, trainee, prospect, etc.).*
4. Alerts will be displayed on both the Admin dashboard and the User profile that the application has been submitted. This alert expires 14 days after the application is submitted.
5. To view all applications, use Admin →Reports → Volunteer Application report.
6. Reminder: **Be sure to update the status when the applicant begins training.*

Awards

Awards are generated nightly based on volunteer hours and anniversary dates. Awards with type 'other' will not be generated. Checkboxes on this screen DO NOT tag users.

Filter Awards

Click on the advanced filters icon to open the filters.

Filter by:

- Groups – Active Volunteer Groups
- Award Eligible – Award that the volunteer is eligible for based on hours or years of service
- Current Awards – must also check "Show All Active Volunteers" to see all volunteers that have the award already

Add an Award

Awards can be added in several ways.

1. From the awards screen check off user(s) in the list to add the award to. Use the 'Actions' button to add the award
2. Tag users throughout the system then add the award from the Tagged Screen
3. Add a new award from the user profile

Documents

Documents are visible by admin users only. Select files to upload or drag and drop them into the 'Drop files hers" container.

Tags

Tagging is used throughout the application to manage or report on a unique set of people.

Tag a User

Tag users anywhere you see a checkbox next to their name or using a tag button. *The checkboxes on Awards are not used as Tags.

From the Users List (Tag/Remove Tag)

1. Click the checkbox next to the user name

OR

1. Filter the list to the users you wish to tag
2. From within the search parameters, click the tag button

Tagged Screen

Clear Tagged Users

Clear All Tagged Users

1. From the Tags screen (Under the "More" drop down button)
2. Click the Clear Tagged Users
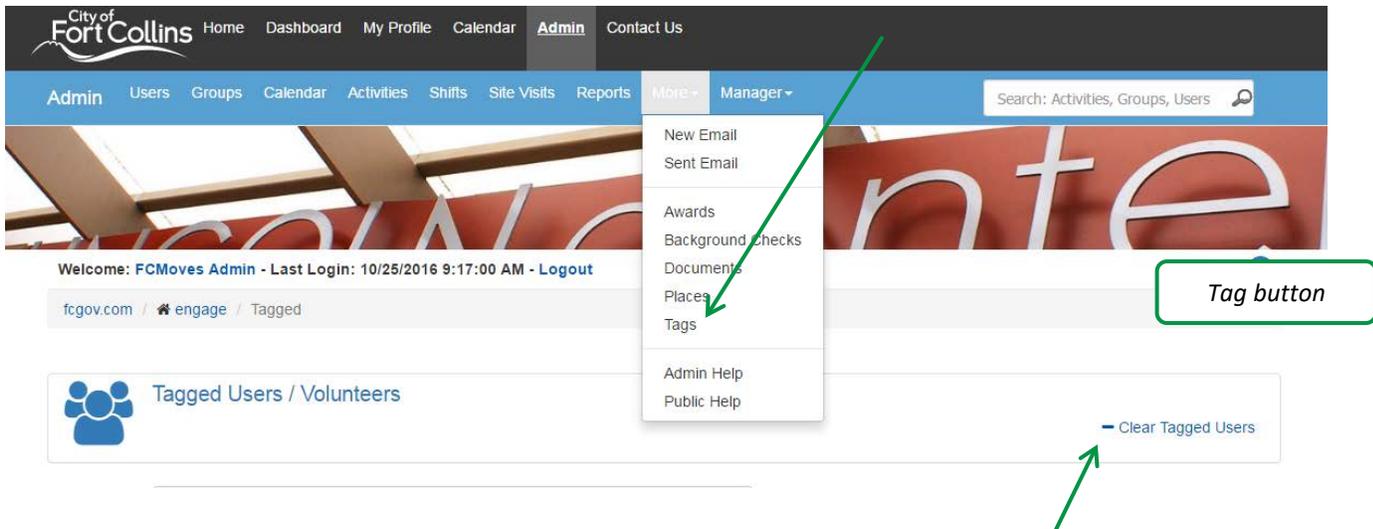
Tag button

Tagged User Actions

The following actions are available for tagged users. If a user is already in a group, has a checklist item or already at that status, it will not duplicate the change you are completing.

1. Change the Volunteer Status
2. Add a User Group
3. Add a Checklist Item
4. Complete a Checklist Item
5. Dismiss the reminder for a Checklist Item
6. Delete a Checklist Item
7. Send Reset Password Email

The actions above cannot be undone.

Glossary

Activities

Displays all activities within the system sorted by date.

Key Features

- Click the "new activity" link to create a new activity.
- Click the icon to get additional search filters.
- Click on the Activity Title to view the activity profile.
- Clicking on a header within the grid will sort.
- Typing in the Search box above the grid will filter all of the columns except date.

Search Filters

- All filters are optional.
- Leaving a filter empty will include all options.
- The filters all work together. If you enter a status, program and place. It will filter to activities that match all three choices.
- Click Filter to apply the filters.
- Click Clear to clear all filters.
- To view all activities with unfilled assignments click on the show filters icon and check "Unfilled Assignments."

Awards

- Awards data is updated nightly. Awards must contain a name, description and requirements.

Background Checks

- Background Checks are integrated with Verified Volunteers
- Background Checks are renewed annually for volunteers in a Position of Trust
- Volunteers will be directed to Verified Volunteers to fill out their background check information from their email

Checklists

- Checklist items are used to keep track of requirements for volunteers.

Company Groups

- Company Groups are groups that volunteer with your organization.
- Users can be associated with a company group.
- Groups can complete site visits and be signed up by administrators for activities.

Department Landing Page

- Department Landing Pages can be reached at engage.fcgov.com/d/<mark>(abbreviation for department ex. NA for Natural Areas)</mark>
- Content is customizable by departments in the List Manager

Emails

New Email

- Allows you to send a blind copy email to users of the system.
- Three ways to get recipients
    - Selected Users - pick users one at a time
    - Selected Groups - pick volunteer statuses and groups to email
    - Tagged Users
- Unlimited attachments up to 10 MB.
- Email signatures are managed on the User Profile (bottom)

Sent Email List

- Allows you to view emails you have sent through the system.
- Sort by column headers
- Typing in the Search box above the grid will filter all of the columns except date, count and attachments.
- Click on the Subject to view the email

Email Templates

- Unlimited, customizable email templates simplify email generation for administrators.

Email Types

- Email Types give users more control over the emails they receive by allowing them to opt out of them by type.

Email Tokens

Insert from this list of tokens to include additional information with your email. The tokens are replaced with the relevant information before the email is sent.

Key	Description
{AnniversaryDate}	Recipient's volunteer anniversary date
{FirstName}	Recipient's first name
{FullName}	Recipient's full name
{Groups}	List of groups the recipient belongs to
{Next10DayNeedHelpActivities}	List of activities that need help in next 10 days
{OrgName_Next5PublicActivities}	List of the next 5 public activities in organization

Document Repository

- Documents can be stored in the following areas

- o Department level
- o Profile level
- o Volunteer Application

Feedback

- Unlimited feedback forms can be created for activities and shifts
- Administrators can choose if they'd like to receive a notification every time a feedback report is submitted or ask the user if they would like to have someone follow up with them, if yes, then only those notifications will be sent to the administrator.
- Each feedback form can be sent to a different email address.
- Feedback forms can be associated with types of programs, listed in the programs page in the List Manager.
- Answer formats for questions include:
  - o Multiple choice
  - o Multiple choice with text
  - o Text
  - o Capture attendance- results included on the Activity Profile- mixed ages, adults, and children

Places

- Displays all places within the application sorted by type. This list includes city and county sites, as well as other meeting places.
- Click the "new place" link to create a new place.
- Click on the place name to view the place profile.
- Clicking on a header within the grid will sort.
- Typing in the Search box above the grid will filter all of the columns.

Reports

- Activity Results
- Anniversary Dates
- Awards
- Checklist
- Name Tags
- Mailing Labels
- Participant List
- Program Evaluation Summary
- Program Feedback
- Shift Evaluation Summary
- Shift Feedback
- Program Statistics
- Special Program Request
- Volunteer Application
- Volunteer Hours
- Volunteer List

- Volunteer Schedule
- Maintenance Log
- Site Visit Contacts
- Site Visit Details
- Site Visits by Place

Shifts

- Shifts allow volunteers to sign up to help with consistent recurring assignments
- A shift can be assigned to one or multiple volunteers
- Volunteers will only see shifts with positions they can fill

Site Visit

- Displays all site visits within the application sorted by date.
- Click the "new site visit" link to create a new site visit.
- Click the icon to get additional search filters.
- Click on the site visit type to view the site visit profile.
- Clicking on a header within the grid will sort.
- Typing in the Search box above the grid will filter the name, place, and patrol type columns.

Search Filters

- All filters are optional.
- Leaving a filter empty will include all options.
- The filters all work together. If you enter a place, and type. It will filter to site visits that match both choices.
- Checking "Maintenance Required" will show all site visits that have a maintenance title or description.
- Click Filter to apply the filters.
- Click Clear to clear all filters.

Special Program Request

Special Program Requests are customized forms that can be sent to a specific email address.

Waiver

Waivers are assigned to groups, activities, and applications.