Offero New Department Configuration

Planning for Super Admin Configuration

1. Volunteer Groups
2. Positions or Duties for each group
3. Required training for each group
4. Representative sample of volunteer responsibilities/roles with the department
   a. Volunteers help with Front Desk
   b. Volunteers help with Special Event
   c. Volunteers complete patrols
   d. Etc…
5. Volunteer Application
6. Any feedback forms
7. Any reports that you complete now, data that you want to report on

Setup Lists in List Management

1. Create Department
   a. Enter Department Settings
2. Create positions
   a. Positions are used throughout the application to allow volunteers access to the following:
      i. Assignments
      ii. Site Visits
      iii. Shifts
      iv. Discussion Boards
   b. Volunteers must be in a group with the associated position to participate
3. Create Checklist Items
   a. Required Training
4. Create Discussion Boards
5. Create Site Visit Types
   a. Self Scheduled Volunteer activity
      i. Bike Patrol, Gardening, etc
6. Create Volunteer Groups
   a. Add volunteer groups to help categorize your volunteers. Use positions to allow groups access to help with different assignments
7. Create Site Visit Contact Types
   a. Items to track with each site visit
      i. # of bags of trash collected
8. Create Site Visit Patrol Types
   a. How did they complete site visit?
      i. Walking, biking, other
9. Create Activity Categories

      a.   How will you categorize activities?
           i.   Volunteer Opportunities, Clubs, Training Opportunities, Special Events

10. Create Result Types
    a. Items to track on an activity
        i. # of bags of trash collected, # of bicycles seen
11. Create Email Template
12. Create Email Types
13. Create Feedback
    a. What kind of feedback do you want to collect from volunteers, participants?
14. Create Program Feedback
    a. Feedback can be associated with each program
15. Create Volunteer Interests
    a. Volunteer Opportunities available that you would like applicants to express an interest in
16. Create Waivers
17. Create Volunteer Applications
18. Create Awards

Get Users online:

1. Have them create accounts then add groups
2. Create User and Add Group