Look2 Volunteer Software

v3.0.1

Manual

This Document Updated:

June 25, 2024

Table of Contents

1. Overview

The Volunteer Software allows your volunteers to enter their contact information into a database and then track their volunteer hours through a simple-to-use touch screen interface. The system also generates reports, including contact lists and volunteer hour totals.

INSTALLATION NOTE: If you have not yet installed the software, or need help initially launching the program, please refer to the *Volunteer Quick Setup Guide* PDF available on the web site support page.

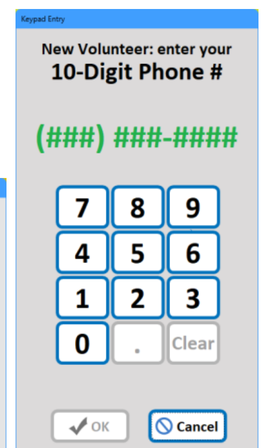
2. Operational Use – Volunteers

The software provides a simple, limited-functionality interface for Volunteers, keeping it as easy to use as possible given the wide range of "computer experience" seen in volunteer bases.

Volunteers can primarily create/edit their profile information, sign in, sign out, record their volunteer hours for specific tasks, and see their own volunteer history.

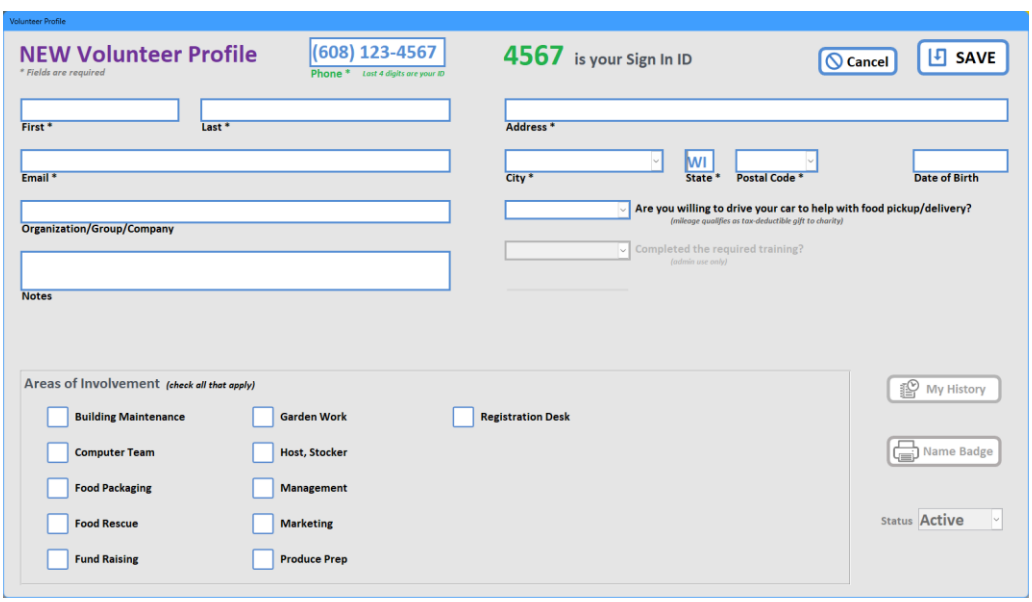
2.1. Volunteer Account Creation

If a volunteer has never used the software before, their first step is to create their account. To start this operation, click the "Create Account" button.



The software first prompts for the phone number to be used for the new account (the last 4 digits are subsequently used to look up this account).

If a 10-digit phone number is entered, the New Volunteer Profile pop-up window appears, allowing the user to enter the rest of their information.



NOTE: this is one of the few times a keyboard is required (though a virtual tablet keyboard can be used). Once their account is in the system, signing in/out of the software can be done simply via a touch-screen.

Your actual screen may look slightly different, and the Areas of Involvement will match those of your organization (as detailed later in this document).

TIP: you can use the keyboard's TAB key to go to the next field.

Each of the fields are now explained:

2.1.1. Personal Data

- **Phone** – Volunteers can use their home, work, mobile, or other phone number as desired. This phone number appears in the "Contact List" reports available to administrators, and thus is used to get in touch with the volunteer should they need to be contacted. As explained later in this document, the last-4 digits are used as the sign-in ID.
  This field is REQUIRED.
  Should the user not wish to provide their actual phone number, a "fake number" can be entered, but of which the last 4 digits should be something they will remember for their sign-in ID. For example, they could enter *(608) 000-1955* and thus use 1955 as their sign-in. This should be the exception and not the rule!

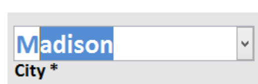
- **Email** – this email address also appears in the "Contact List" reports available to administrators, and thus is used to get in touch with the volunteer should they need to be contacted.
  This field is REQUIRED.
  The software does not check for a valid email format. So if the user does not wish to list theirs or if they don't have one, enter "N/A" or some other text/note into the field. It simply cannot be blank.

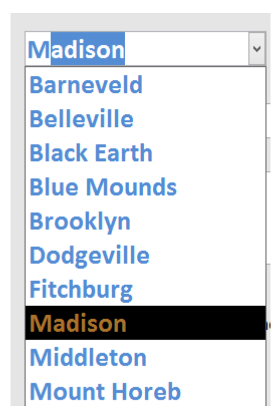
- **First** – First name of volunteer.
  This field is REQUIRED.

- **Last** – Last name of volunteer.
  This field is REQUIRED.

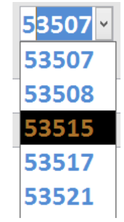
- **Address** – Street address of volunteer.
  This field is REQUIRED.
  If homeless, or the volunteer does not wish to list their address, enter "N/A" or some other text.
  NOTE: after the user has entered their address, the software "standardizes" the address automatically. For example, if the user typed in:
  123 West Main Boulevard, Apt. #12
  after going to another field, the software will change it to:
  123 W MAIN BLVD #12

- **City** – The city name portion of the volunteer's address. To help keep entries consistent (spelling, capitalization), a dropdown list of pre-configured city names is available to the user for data entry. (Editing of this list is covered later in this document)
  Click on the small down-arrow to the left of this field to activate it *(or press ALT-down arrow)*. If the volunteer types in their entry, matches are automatically shown so the user doesn't have to type in the entire city name (they can simply press the TAB key to accept the highlighted name).
  You are not limited to the names in this list; any name can be typed in.
  This field is REQUIRED.



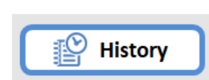


- **State** – The 2-letter abbreviation of the state/province name portion of the volunteer's address. This is pre-filled in via the site's configuration default.
  This field is REQUIRED.



- **Postal Code** – The 5-digit zip code *(or Canadian Postal Code)* of the volunteer's address. As with City name, a drop-down list of zip codes is available to the user for easy data entry (though you're not limited to those in the list; you can enter your own).
  This field is REQUIRED.
- **Date of Birth** – The volunteer's birthday, including month, day, and year. The primary use of this field is for identifying adult volunteers vs. children and is used for the Contact Lists. If this field is left blank, it is assumed they are an adult.
  The software will auto-format the entry for consistency.
  Example: if the user enters
  8.12.1950
  or
  8 12 50
  The software will reformat it to:
  8/12/1950
  This field is OPTIONAL by default. However, it can be made to be REQUIRED via a parameter setting.
- **Organization/Group/Company** – This is a free-format text field and can be used to for various purposes. For example, students wishing to track their volunteer hours for National Honor Society could enter "NHS" or their high school name. Companies and other organizations (e.g., Rotary Club) can have their members use this so reports could be given as to hours their group contributes.
  This field is OPTIONAL.
- **Notes** – This is a free-format text field and can be used for various purposes. For example, users can indicate special skills they have (e.g., photography), additional areas of involvement (e.g., painting), or any other item they wish to highlight (e.g., I have a pick-up truck and can help deliver).
  This field is OPTIONAL.
- **Custom Field1** – If your system has been configured to show the optional Custom Field1, a free-format text field can be used for various purposes. For example, the label could be "Other Languages Spoken", and users can then enter "Spanish, French".
  This field is OPTIONAL.

2.1.2. History



The History button brings up a list of hours for the selected volunteer. It is disabled when creating a new profile. Details are covered later in Section 3.6.

2.1.3. Status

The status dropdown list shows if the volunteer is Active or marked as Inactive.

This is a read-only field for Volunteers (hence it appears grayed out and is disabled). It can only be modified by an Administrator (details covered later in this document).

2.1.4. Volunteer Agreement Date

For existing volunteers who have already signed the Volunteer Agreement, their profile shows the date they last signed it, as well as a link to bring up the agreement. Details are covered in Section 2.4.

This is hidden when creating a new profile, as the agreement form will automatically appear upon saving the new profile.

2.1.5. Areas of Involvement

The software presents a list of up to 20 Areas of Involvement (defined via the configuration database covered later in this document). There is a parameter called “Tasks Admin Only” (in the tblParameters table) which affects how these checkboxes are used.

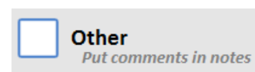
If the parameter is set to False, the user is allowed to check off any areas they wish to be considered for in their volunteer role. An example of what this looks like is shown at the start of this section.

If it is set to True, then these checkboxes are disabled for the user, only becoming enabled when logged in as an Administrator who is editing a particular volunteer’s profile. An example of what this looks like is shown below (note the “Admin Only” designation, and the boxes are all greyed out):

Checking these boxes has two effects:

- When a volunteer signs in, their areas of interest are shown in a larger/bold font (to help highlight them for quicker identification during the sign-in process).
- Administrators can generate contact lists for specific tasks (e.g., show me all volunteers who have shown an interest in helping with Marketing). Details covered later in this document.

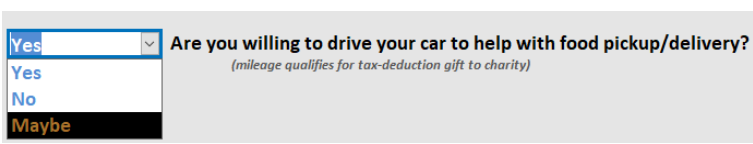
If your organization has a task entitled “Other”, the user is encouraged to put comments in the Notes section of the form to further identify/clarify the nature of that interest.



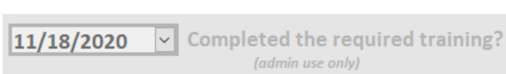
2.1.6. Questions *(if configured)*

Up to 3 questions may be optionally configured for each person’s profile. These are located in the bottom section and offer multiple-choice answers.

If a question has been configured for Volunteers to answer directly, it will be enabled (appear blue) and the answer can be selected from the choices presented.

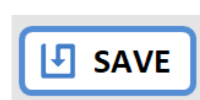


If a question is only to be answered by an Administrator, it will be disabled (grayed out).

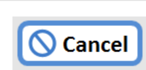


2.1.7. Save/Cancel

When the profile has been filled in, press the SAVE button to create the new account.



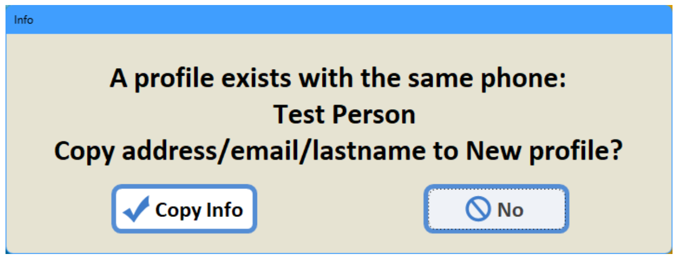
If the user does not wish to create a new profile (or save any changes to an existing one) they can simply press the Cancel button to dismiss the Volunteer Profile form.



NOTE: users will be able to edit their profile whenever they sign in.

2.2. Multiple Volunteers in Same Household

A common scenario is an entire family volunteering together. It is recommended that a parent create their account profile first. Then, when creating the account for a child, if the user enters the same 10-digit phone number, the system detects that it has been entered into the system and presents the following prompt:



If the user presses “No”, they must fill in all fields from scratch for the new profile.

However, if the user presses “Copy Info”, the following field are automatically copied over:

- Email
- Last Name
- Address
- City, State, Zip

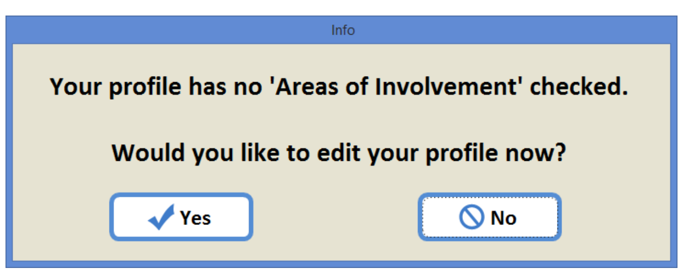
The cursor is placed in the First Name field to facilitate quick entry of other names in the household.

Any of the information can, of course, be overwritten (email changed, different last names, etc.), as each person in the household gets their own unique entry. This phone number identification simply serves as a means of simplifying the initial data entry.

2.3. Miscellaneous - Profile

If a user fails to enter in a required field, they are reminded to provide such data when they attempt to click Save, and the cursor is placed in the field upon clicking OK:

If a user does not check any of the Areas of Involvement checkboxes, they are given an opportunity to edit their profile:

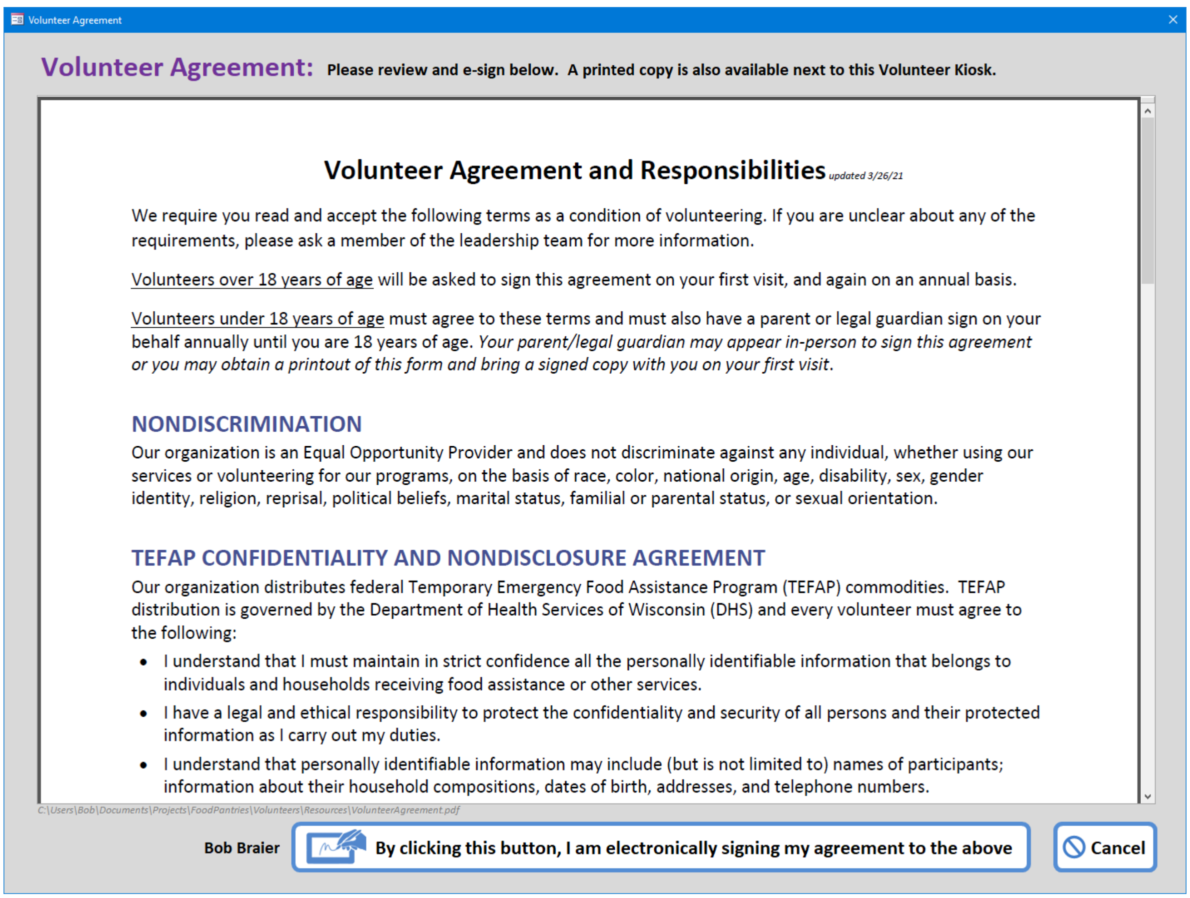


Key shortcuts:

- TAB key can be used to advance forward through the fields.
- SHIFT+TAB can be used to traverse backwards through the fields
- Space Bar can be used to toggle checkmarks on/off (when they have the focus)
- ESC key closes this form without saving (same as pressing Cancel)
- Right-click copy/paste is available in text fields
- CTRL-Z in a text field will perform a simple "undo" (handy if you just typed over a field and you wish to restore it to what it was)

2.4. Volunteer Agreement

If your system has been configured to enforce Volunteer Agreement signatures, then a window will appear if the volunteer's date of last signature is older than the renewal timeframe (e.g., 1 year):



If the person is a minor, an additional message is shown:

Profile is < 18. It's assumed a parent/guardian is e-signing this. If a minor is e-signing it, please also turn in the parental/guardian form.

The volunteer has the choice of either updating their signature date, or cancelling out of this screen.

If the Signing button is pressed, the date is added to the Volunteer profile record

If Cancel is pressed, but the agreement is required for volunteering, the software won't allow sign-in.

3. Sign-In Process

Once a user has their volunteer profile in the system, they can Sign In and have the system track their hours.

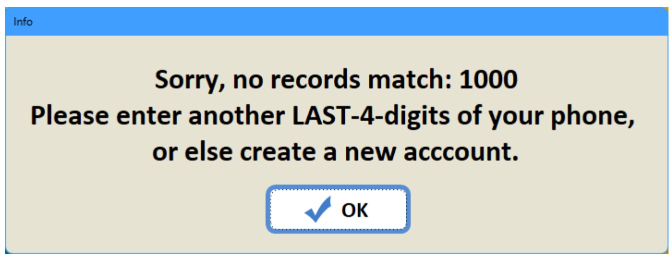
3.1. Phone Entry

They simply enter the last 4-digits of the phone number associated with the account.

The user can either tap on the numbers via the touch screen, or use a mouse to click on the numbers, or use the numbers on the keyboard.

If a mistake is made, pressing the Clear button will start the number-entry process over again.

If no record is found matching the entered digits, a message is presented to the user:



NOTE: as with most single-message dialogs having only an OK button, this message window will self-close after 10 seconds.

If more than one person has the same last 4 digits in their phone numbers, thus sharing the same Sign-In ID, the system brings up a list asking the person to clarify who they are:

They can either click on their name and then click “Use Selected”, or they can simple double-click their name. They can also click Cancel and re-enter another Sign-In ID.

If they are not in the list, or are otherwise not found, please make sure the correct phone number is being referenced (i.e., cell phone vs. home phone, etc.). Administrators can also search for users in the system using additional features (explained later in this document).

3.2. Sign-in Pop-up Message

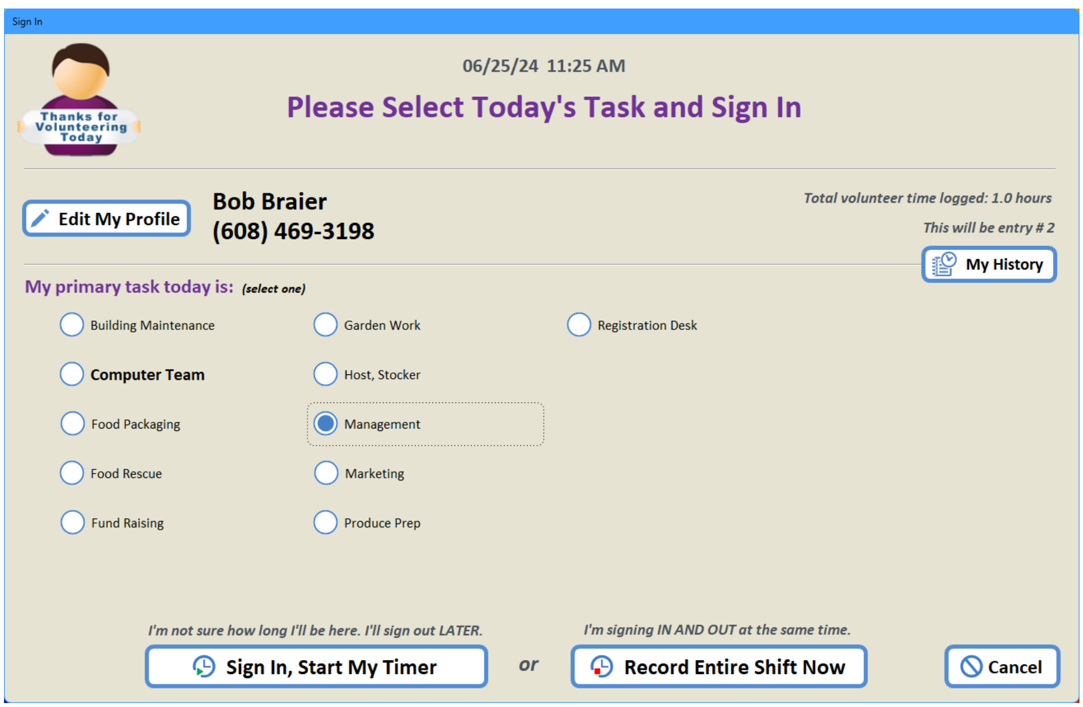
Once a user had entered their 4-digit ID and uniquely identified themselves, a pop-up message may appear (if one has been configured by the administrator). An example is shown below:

NOTE: the specific message shown (if at all) is based on what has been configured per site. This message may only appear once, or only up until a certain date (again, all based upon the configuration of the message by the administrator).

After the user presses OK (or there was no message configured to begin with), the Sign-In window appears.

3.3. Selecting Today's Task

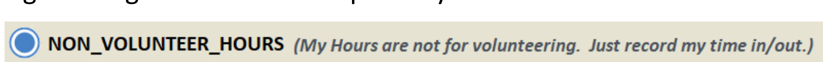
The user is shown the list of tasks available and may select one by simply clicking on it. Those identified in the user's profile as an area of interest are shown in larger/bolder font, as shown below:



If they have already volunteered before using the system, the last task recorded will be selected by default as a means of simplifying the data entry.

If they are performing more than one task, they have 2 choices: record all of the hours under the "primary" task, or Sign-In twice (once for each task, logging the hours separately for each).

If the system has been configured to allow tracking of non-volunteer hours, an additional option is presented allowing tracking of those hours separately.

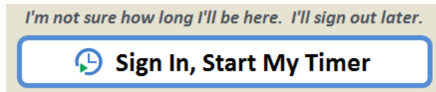


3.4. Tracking Hours

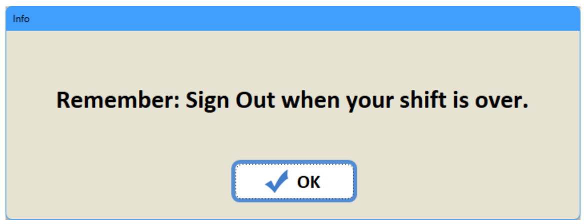
There are two ways of recording volunteer hours: using a timer, or entering in a set number of hours.

3.4.1. Using a Timer

If a user is not sure how long they will be volunteering for, they can elect to have the software keep track of the time they spend volunteering that day. Simply click the “Sign In, Start My Timer” button.

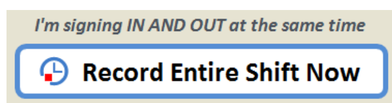


The timer then starts and they are reminded to come back at the end of the shift to Sign Out (and thus stop the timer and record the hours).

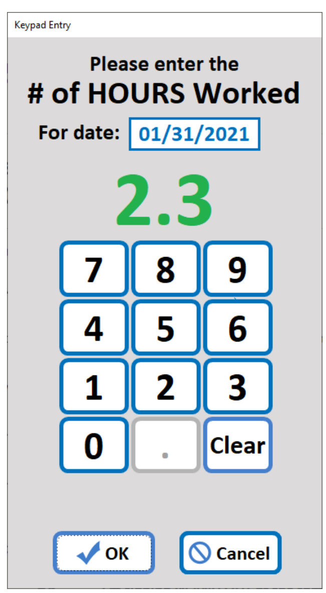


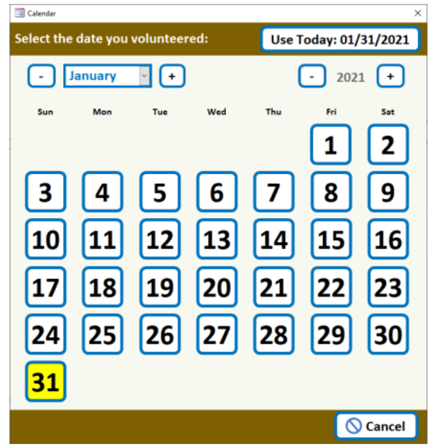
3.4.2. Recording the Entire Shift Now *(also for past dates)*

If the user knows how long they will be volunteering for (or have already completed the task and are coming to the software to now record what they have already done) they can bypass the need for a timer and coming back to Sign-Out, instead recording everything at once:



The user is prompted for the # of hours worked via a pop-up keypad. Fractional hours can be entered.



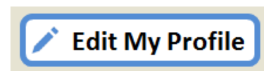


There is also a date entry field. It is set to today's date by default, but it can be overridden, thus allowing for entry of hours worked on previous days. Simply click on it to bring up the calendar entry. The current date is highlighted in yellow. Use the controls at the top to select another month. Click the desired button to use that specific day.

Once the hours (and optional date) have been entered, press the OK button to confirm your entry. A confirmation tone is played and the hours are recorded.

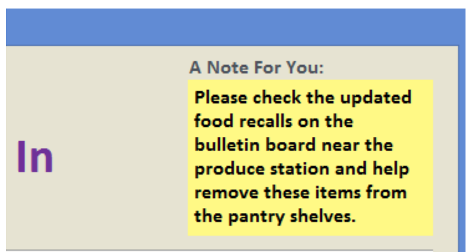
With the data logged, the volunteer does NOT need to Sign-Out. They have entered their entire record all at once using this method.

3.5. Miscellaneous - Sign In

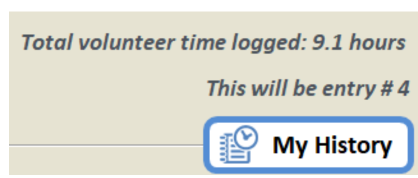


By pressing the Edit My Profile button on the Sign In window, the user may change their personal information whenever they sign in. This is the same form as was presented when they first created their account.

A note may appear in the upper-right corner of the Sign-in screen (if one has been configured by the Administrator). An example is shown below:



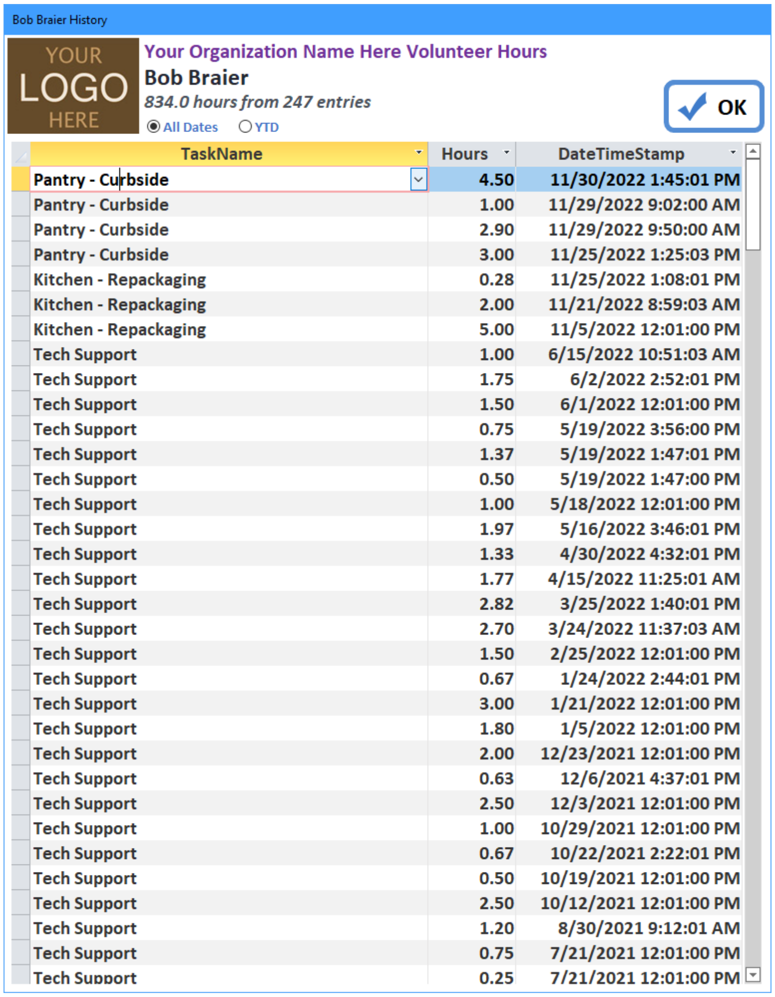
The user is shown a quick summary of the total volunteer time they have logged.



There is also a My History button which brings up a detailed view of the hours worked. This is detailed more fully in the next section.

3.6. My History (print, edit)

By pressing the My History button from the sign-in screen, or by pressing the History button in the Edit Profile screen (which Administrators can do for other volunteers), a pop-up window appears showing the detailed records of the hours worked.



TaskName	Hours	DateTimeStamp
Pantry - Curbside	4.50	11/30/2022 1:45:01 PM
Pantry - Curbside	1.00	11/29/2022 9:02:00 AM
Pantry - Curbside	2.90	11/29/2022 9:50:00 AM
Pantry - Curbside	3.00	11/25/2022 1:25:03 PM
Kitchen - Repackaging	0.28	11/25/2022 1:08:01 PM
Kitchen - Repackaging	2.00	11/21/2022 8:59:03 AM
Kitchen - Repackaging	5.00	11/5/2022 12:01:00 PM
Tech Support	1.00	6/15/2022 10:51:03 AM
Tech Support	1.75	6/2/2022 2:52:01 PM
Tech Support	1.50	6/1/2022 12:01:00 PM
Tech Support	0.75	5/19/2022 3:56:00 PM
Tech Support	1.37	5/19/2022 1:47:01 PM
Tech Support	0.50	5/19/2022 1:47:00 PM
Tech Support	1.00	5/18/2022 12:01:00 PM
Tech Support	1.97	5/16/2022 3:46:01 PM
Tech Support	1.33	4/30/2022 4:32:01 PM
Tech Support	1.77	4/15/2022 11:25:01 AM
Tech Support	2.82	3/25/2022 1:40:01 PM
Tech Support	2.70	3/24/2022 11:37:03 AM
Tech Support	1.50	2/25/2022 12:01:00 PM
Tech Support	0.67	1/24/2022 2:44:01 PM
Tech Support	3.00	1/21/2022 12:01:00 PM
Tech Support	1.80	1/5/2022 12:01:00 PM
Tech Support	2.00	12/23/2021 12:01:00 PM
Tech Support	0.63	12/6/2021 4:37:01 PM
Tech Support	2.50	12/3/2021 12:01:00 PM
Tech Support	1.00	10/29/2021 12:01:00 PM
Tech Support	0.67	10/22/2021 2:22:01 PM
Tech Support	0.50	10/19/2021 12:01:00 PM
Tech Support	2.50	10/12/2021 12:01:00 PM
Tech Support	1.20	8/30/2021 9:12:01 AM
Tech Support	0.75	7/21/2021 12:01:00 PM
Tech Support	0.25	7/21/2021 12:01:00 PM

If there are more entries than can fit in the window, a scroll bar appears to the right.

A summary of the total hours and the number of entries appears at the top, along with your organization's name and logo. There's an option for displaying history for all dates, or just year-to-date. All Dates YTD

If you are logged in as Administrator and viewing someone's record, a print button also appears at the top. You can thus print the history of hours to any print destination, including saving to a PDF if you have such a print driver installed.

If you are not logged in as Administrator, you can still print it out by pressing "CTRL-P" on the keyboard.

You can also edit the entries in the table. Simply click on an item to change it. When you click off of the row, the changes are automatically saved and the header totals are updated.

Hours
2.00

To delete a record, click the small gray box in front of a row to highlight it and press the delete key.

Admins can also add new entries using the Add Hours button. Details covered in Section 6.8 **+ Hours**

4. Sign-Out Process

If a volunteer signed in and elected to use a Timer to keep track of the hours as they work, they must come back to the system to Sign Out. As with the Sign In process, they simply enter the last 4 digits of their phone number using the keypad on the home screen.

A Sign Out window pops up, as shown:

NOTE: if the user was signed in with non-volunteer tracking hours, the message under thanks reads:

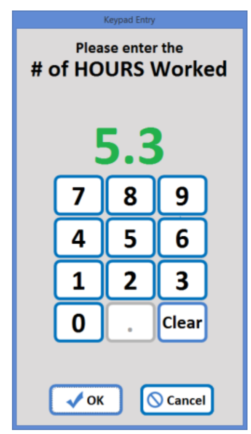
"We appreciate your using this system!"

The user is given a chance once again to edit their profile if they wish … but the primary function is to Sign Out.

There are 2 choices:

- Use the automatically calculated time *(via the running timer since they Signed In)*
- Use a Manual Entry 2.0

The Manual Entry option gets initially populated with the default shift length for the task they indicated they were doing at Sign In. They can override this value by clicking on the number and entering their hours directly.



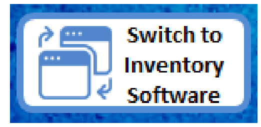
4.1. Sign-Out Timestamp Variations

The exact timestamp used for a sign-out process varies slightly (mostly in the seconds used) to provide further information on which process was used to record the hours. In the notations below, hh:nn refers to the hour and minutes of when an action was taken.

12:01:00 SignIN entering all at once (no timer) and user selects another date
hh:nn:**00** SignIN entering all at once (no timer) for the current date
hh:nn:**01** SignOUT using the timer
hh:nn:**02** SignOUT overriding timer and using manual hours
hh:nn:**03** SignOUT manual hours when user forgot to sign out for an older date
hh:nn:**04** Admin Screen used to log out user
12:01:05 Admin manually entered hours into history

5. Switch to Other Look2 Software (Registration or Inventory)

While it is recommended that the Volunteer software run on its own machine, there are some smaller food pantries wanting to run either the Inventory or Registration software on the same machine as the Volunteer Software.



If the Volunteer Software detects that either of the other two software programs are indeed running (it checks at startup, as well as every time a record is stored to the database), an additional button appears on the main screen.

Pressing it will bring that software to the front. (It has a corresponding "Switch to Volunteer Software" button to then bring you back to this program).

6. Administrative Functions

There are a number of Administrative Functions available in the system. This section covers areas available to those in the organization authorized to perform these additional tasks.

6.1. Today's Stats

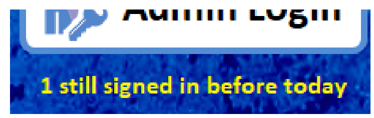
A quick summary of today's volunteer statistics is shown on the home screen, including:

- Number of unique people for the day
- Total Tasks for the day
- # of volunteers still "Signed In"
  (i.e., with a timer tracking their hours)

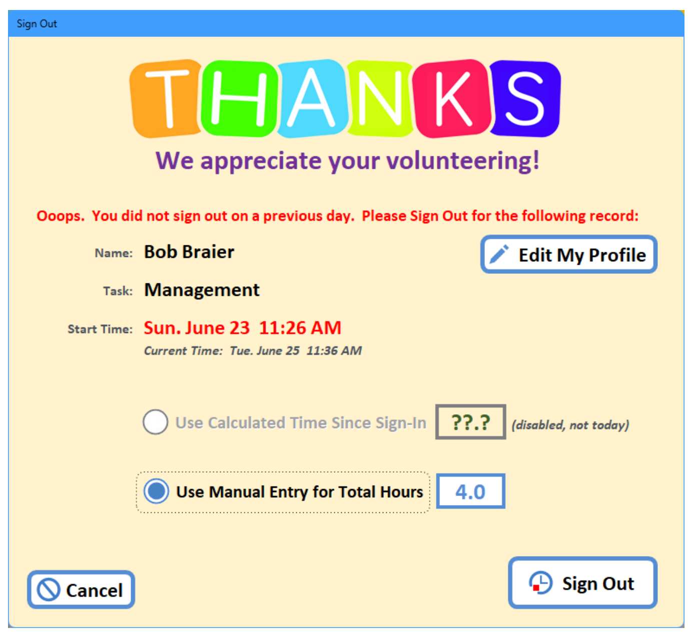
In the example show, 4 different volunteering entries have been made, but by only 2 unique volunteers. Perhaps volunteers worked in the morning, signed out for lunch, and now have re-signed in for the afternoon. Also, of the 2 unique individuals, 1 of them remains signed in with a timer tracking their hours; they must come back later to sign out .

6.2. Volunteers Who Forget to Sign Out

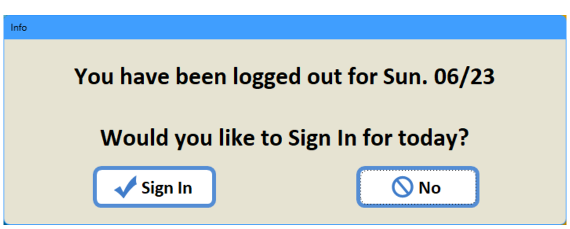
Occasionally a volunteer may forget to sign out. If that happens, a message window appears under the Admin Login button on the Home Screen stating how many are still signed in from before the current day (this area updates whenever someone signs in).



Should the volunteer attempt to Sign In again on another day while still remaining signed in from a previous day, the Sign Out window first appears with a message telling them to please enter their h ours manually (the automatic timer option becomes disabled, as the time span has lapsed over a day). The date/time of their previous entry is shown in red, with the current date/time shown underneath for reference.

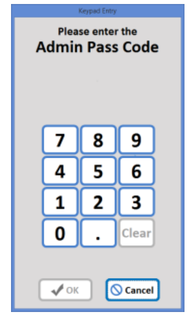


Once they sign out, they will then be asked if they would now like to Sign In for this new day.

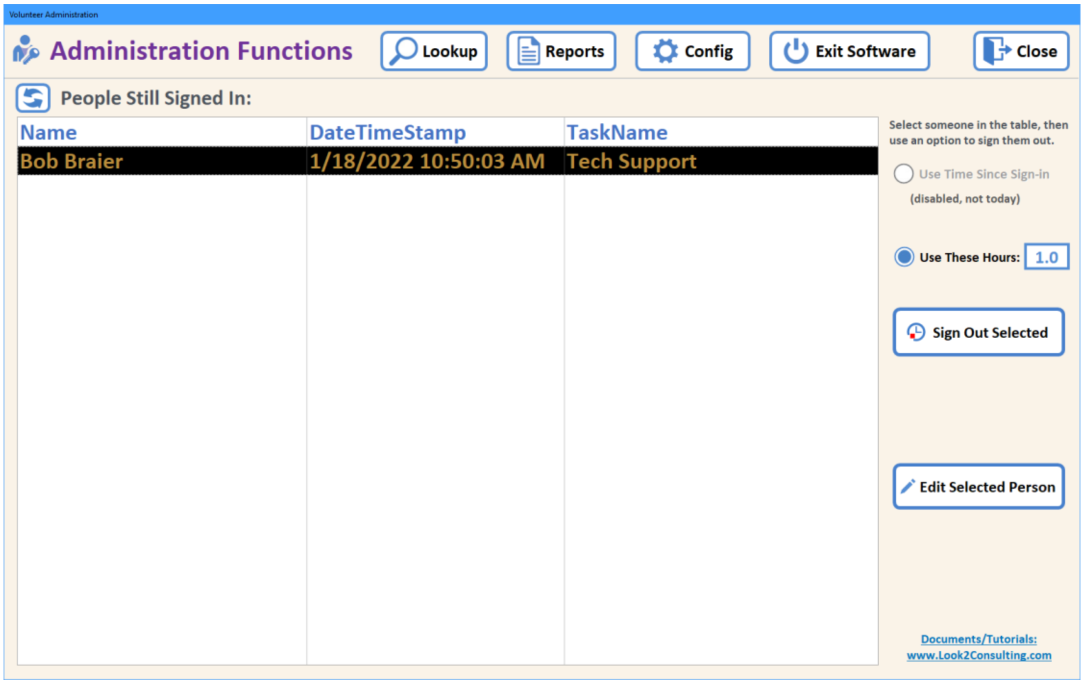


Alternatively, an administrator has the ability to sign out people who forgot to do this on their own. This is covered in the next section.

6.3. Admin Login



Clicking the Admin Login button on the Home Screen brings up a dialog asking for the Admin Pass Code. Upon successful entry of the code, the following window appears:



From here the user can access the various administrative functions described in this chapter.

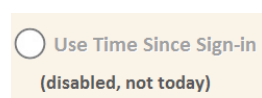
6.4. Sign-Out Another Volunteer

As described earlier, sometimes a volunteer elects to Sign In using a timer and then forgets to Sign Out. The administrator screen shows a list of all people who are still signed in. Some may still be working, and should thus be "left alone" so their timer can continue to track their hours. However, some may be from a previous day (as identified by the date/time stamp next to their name).

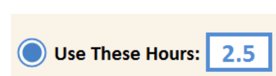
NOTE: if you are running the volunteer software on more than one PC, it is strongly recommended that you press the Refresh button prior to signing someone out. This updates the list, just in case that person actually signed out on another PC.

An administrator can select a person from the list and then choose how many hours to assign that person via the choices shown to the right of the table:

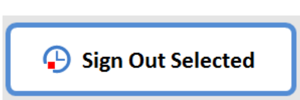
- Use time since sign-in (i.e., using the timer calculations). This option is only available if the user signed in that day. If it was for a previous day, the timer option is no longer applicable and that option gets disabled, as shown.



- Use a manual entry. This option gets pre-populated with the default duration for the task they're doing.



To complete the process, the administrator must click the Sign Out Selected button.

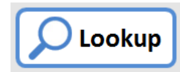


The selected use gets assigned the hours specified and is then removed from the list.

6.5. Edit the Volunteer's Profile

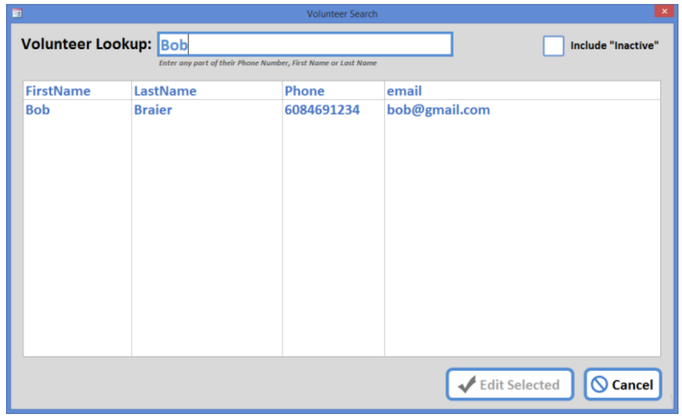
An administrator can select a person from the list and then click the Edit Selected Person button to bring up that Volunteer's profile. Note, if there is a password assigned to this function, you will be prompted to enter it before being allowed to edit that person's profile.

6.6. Volunteer Lookup



Administrators can also look up a volunteer's information by clicking on the Lookup button at the top of the Administration window.

A search window appears.

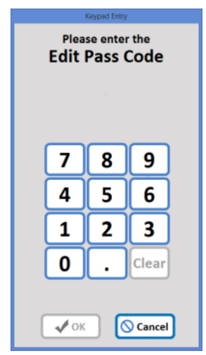


Administrators can enter in any part of the user's phone number, their first or last name, email, or answers to the optional personal questions (if configured for your organization). A question mark ? can be used as a single-character wildcard (matching any character).

Results are shown instantly in the table. If any optional questions were configured, the answers are shown in additional columns to the right.

By default, the results do NOT include anyone marked as Inactive. To include these volunteers as well in the search results, simply check the "Include Inactive" checkbox.

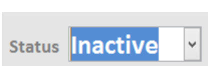
Administrators can optionally edit a person selected in the list. This feature can be optionally protected by another level password. This way "supervisors" can help people look up their sign-in ID or see if they even have a record in the system, but only higher-level administrators can edit other people's profiles. If a password has been configured for this feature, the user is prompted for the Edit Pass Code when the Edit Selected button gets pressed.



6.7. Mark Volunteer as Inactive/Active

Occasionally a volunteer will no longer use the system. This can be for several reasons, including moving out of the area or passing away. When this occurs, the user should NOT be deleted from the table, but rather marked as Inactive.

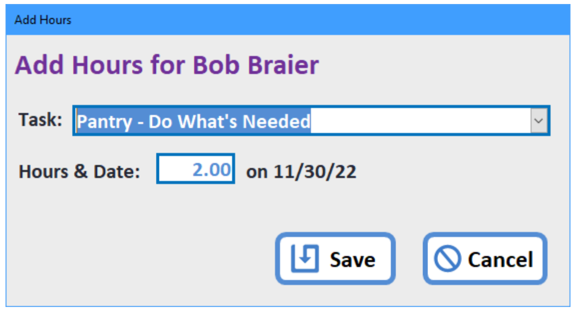
To do this, use the Admin Login button to access the Lookup function. Find the volunteer and use the Edit Selected button to bring up their profile. As Administrator, you can then change the Status in their profile from Active to Inactive using the dropdown list provided.

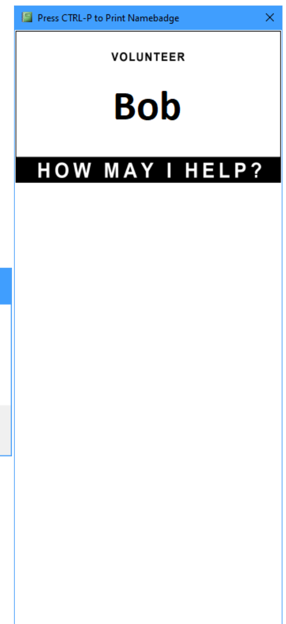


NOTE: This can ONLY be accomplished via the administrative steps outlined; if you attempt to just use their sign-in directly and bring up their profile normally, editing of this status feature is disabled.

6.8. Add Hours to a Volunteer's History

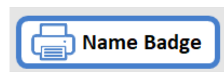
When an Admin clicks on the History button within another Volunteer's profile, the history window also includes an Add Hours button. Clicking it brings up a window allowing for selection of a task, the hours, and date.

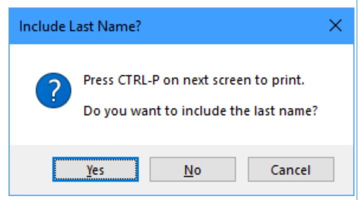




6.9. Print Name Badge

As an admin, you can print out a name badge for a volunteer. To do this, use the Admin Login button to access the Lookup function. Find the volunteer and use the Edit Selected button to bring up their profile. As Administrator, the Print Name Badge button within their profile becomes enabled (there is an option to also enable this for all volunteers so they can print out their own name tag).



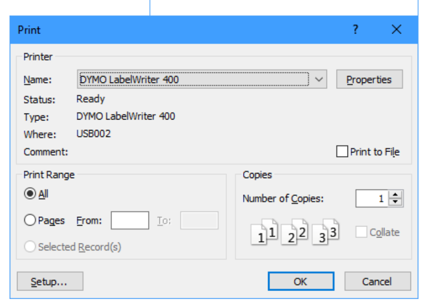


Clicking the button brings up a question:

- Press "Yes" to include the last name on the badge
- Press "No" to exclude printing the last name
- Press "Cancel" if you no longer wish to print

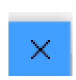
After pressing either Yes or No, a preview of the name tag is then shown. Note: the font size for the first name automatically is made smaller for names > 11 characters.

While the window appears tall, the actual name badge is 3.5" X 2". *(Note: the background image can be modified for you location … it is in the Resources directory.)*



Press **CTRL-P** while previewing the name badge to bring up the print dialog. Here you can select the desired printer.

Use the Close box in the upper-right corner to close the window.



It has been sized so that it can work with the Dymo Label Writer used by the Registration system for ID Cards and Visit Tickets. Thus, you can share one printer for both software programs.

NOTE: By default, this can ONLY be accomplished via the administrative steps outlined; if you attempt to just use their sign-in directly and bring up their profile normally, this button is disabled. There is, however, an option to allow Volunteers to print their own name badges.

6.10. Print Reports

Administrators can also print out reports, accessible by pressing the Reports button.

This can optionally be protected with another level of password (so that "supervisors" cannot access reports, but only higher-level administrators). If this function is password protected, the user is prompted for the Data Pass Code.

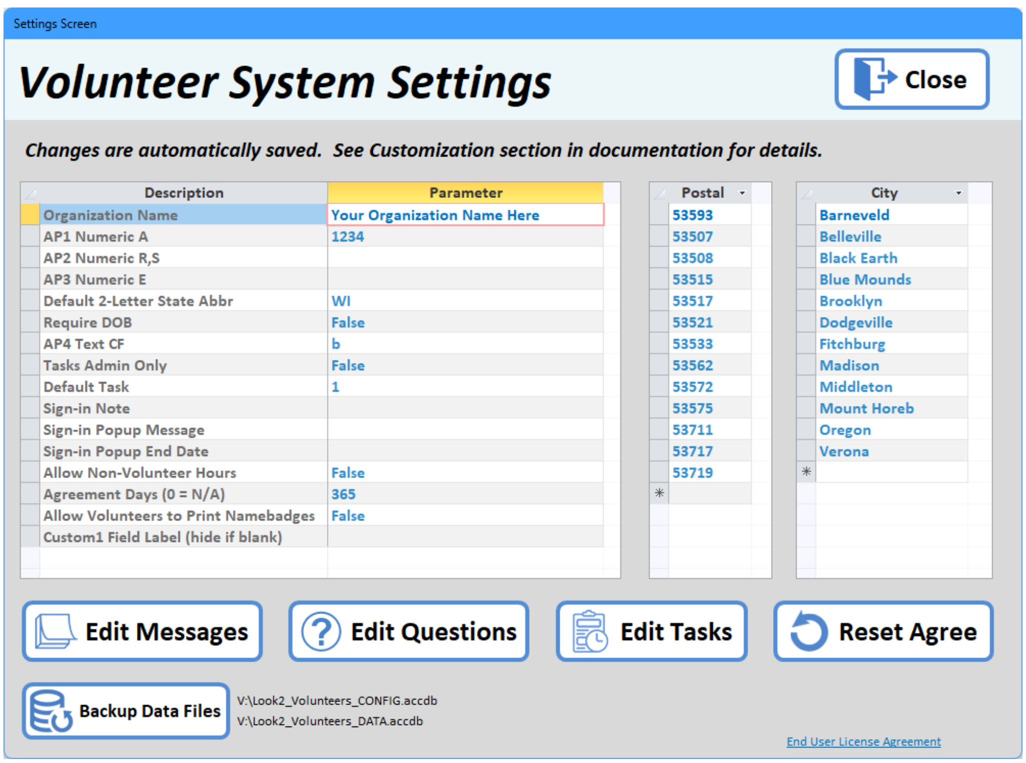
A reports window appears. Because reporting is a larger function, details will be covered in the next major section in this document.

6.11. System Configuration

Administrators can edit some of the configuration parameters used by the software by pressing the Config button.

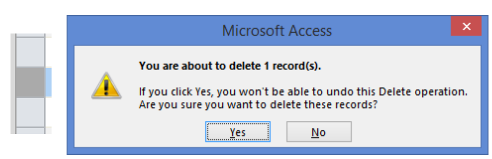
This can optionally be protected with another level of password (so that "supervisors" cannot access reports, but only higher-level administrators). If this function is password protected, the user is prompted for the Data Pass Code.

The System Settings window appears.



Entries for tblParameters, tblZipCodes and tblCityNames are shown. To edit an existing entry, click it and type a new value.

To delete a City or Postal Code, click on the small box to the left of the entry (selects the "row" in the table) and press the delete key on your keyboard. A warning message is shown.

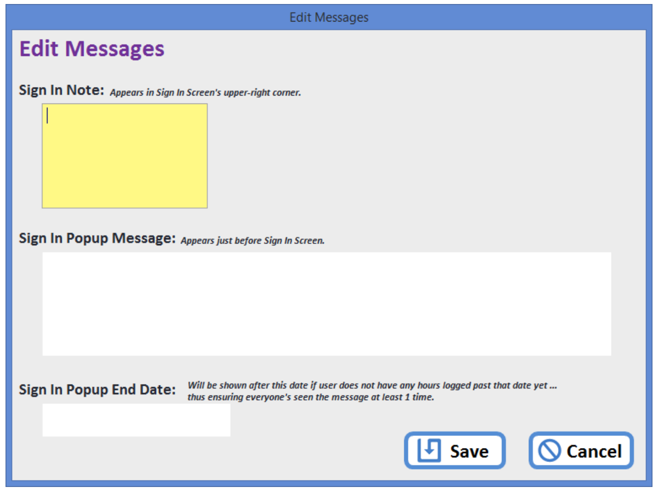


To add a new City or Postal Code, click on the last row (has an asterisk in the left-hand box) and enter a new value.

There are 5 additional buttons in the lower portion of the screen. These are now described.

6.11.1. Edit Messages

As described in Section 3.5, a note can be configured to appear either as a small post-it note or as a pop-up display during the sign in process. To edit either of these messages, press the Edit Messages button in the System Settings screen.



Here you can enter the note in the same format as they will be shown to the user.

You can also specify the Sign In Popup End Date.

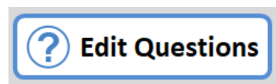
These are further described later in this document in Section 8.

To remove a note that already existed, simply highlight the text and delete it.

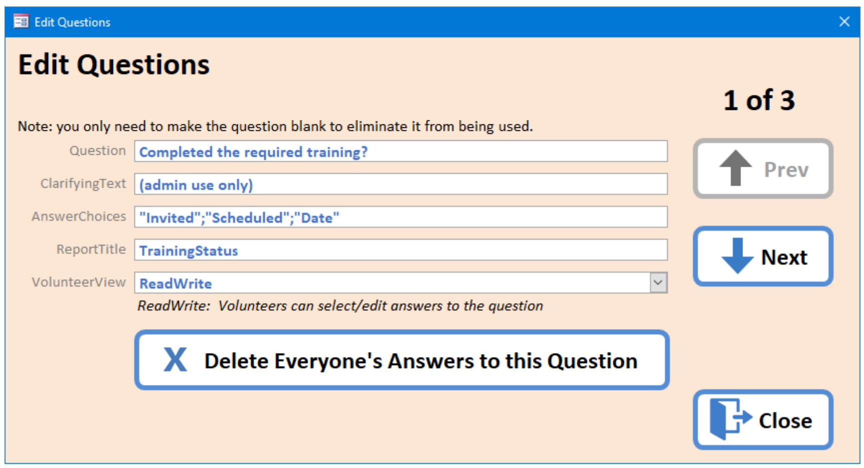
Click Save when done editing the message(s).

6.11.2. Edit Questions

This brings up a dialog allowing you to edit the 3 optional questions that can be configured to appear in everyone's profile.



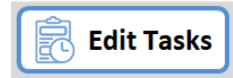
Use the Prev/Next buttons to cycle through the 3 questions.



You can also delete the answers to the selected question, helpful if you are changing the question completely (not just re-wording it) and want to wipe out everyone's answer to the old question.

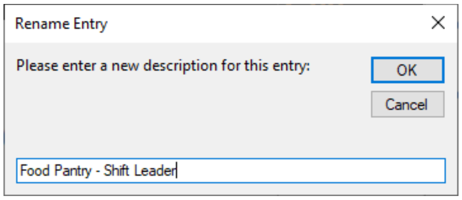
See Section 8.6 for details.

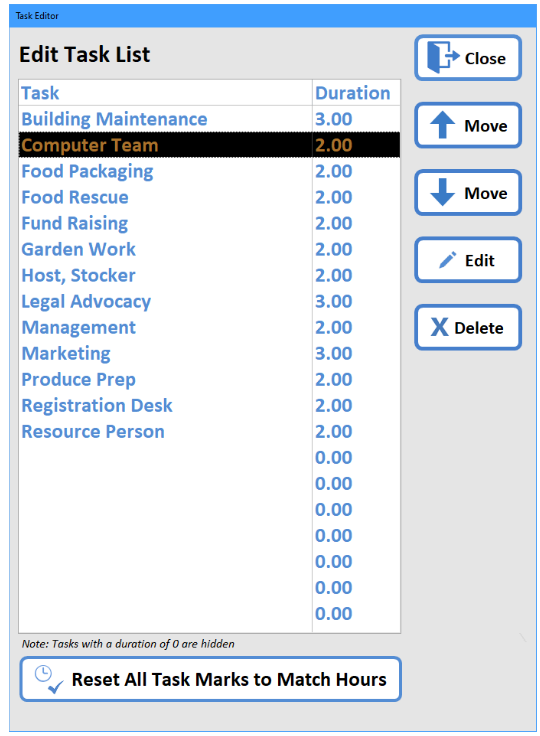
6.11.3. Edit Tasks



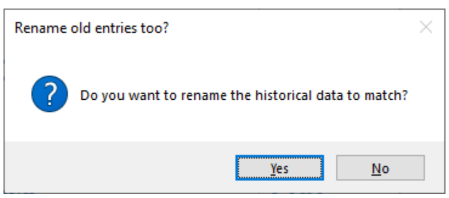
The list of Tasks used for categorizing volunteer hours can be edited by pressing the Edit Task Names button in the System Settings screen.

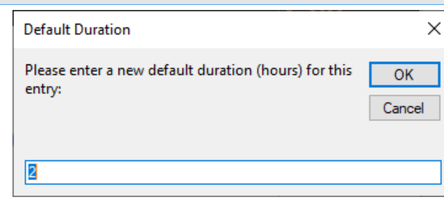
Click an entry in the list and then click the Edit button. You will first be prompted with the new name to be used for that task.





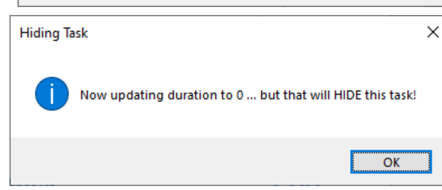
You are then prompted if you want to rename any existing history entries to match. This is useful if you simply want to fix spelling and/or are giving the same task a slightly different name. You would choose "No" if this is a completely different task and you simply want to preserve the "old task" entries in the database.



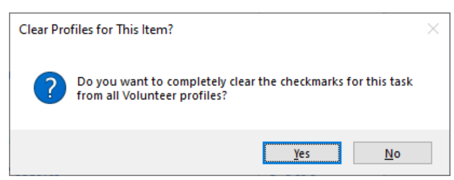


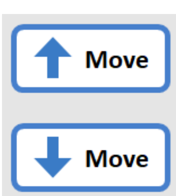
Next, you are prompted to enter in the default duration (in hours) for that task.

NOTE: if you enter 0 for the default duration, you are informed that task will NOT be shown to the user. That slot/space will be blank in the sign-in screen and the user's profile screen.

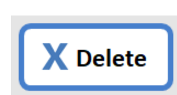


Finally, you are asked if you wish to reset all checkmarks for all of the Volunteer Profiles. You should choose Yes if this is a completely different task from the original one (i.e., it's not just a rename of the same task).





You may also move a selected named task up or down the list. The order shown is the order used when people sign in and update their profile.

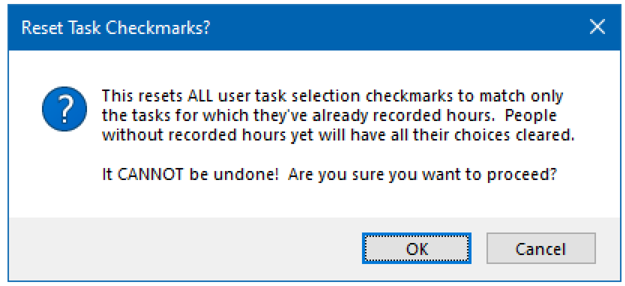


Press the Delete button to remove an existing entry. Historical data associated with the selected task will NOT be deleted, but user checkmarks for that task will be reselet to unchecked.

After the system has been used for a long time, some food pantries have expressed the desire to update the task checkmarks for people to match only what they have actually done to date, rather than other tasks they wish to do but have no history of doing yet.

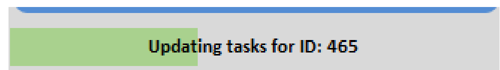
Pressing the Reset All Task Marks to Match Hours button at the bottom of the Edit Task screen does just that.

It first warns you that this action cannot be undone.



Pressing OK will then cause the software to go through each person's history and set their task list to match their task history.

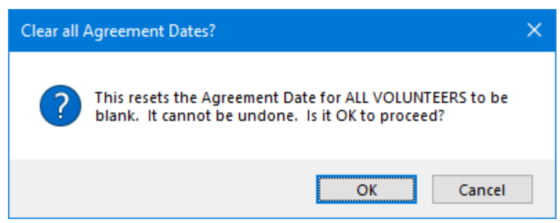
This may take a minute or two, depending upon how many users and how much history you have in your system. A progress bar is shown under the button, with a final count of how many users were updated when complete.



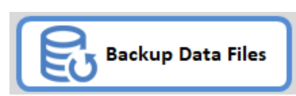
6.11.4. Reset Agree

This brings up a dialog asking if you want to reset the Agreement Dates for all volunteers.

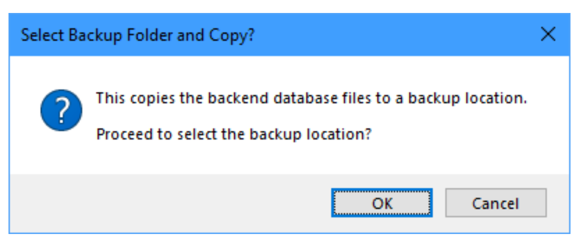
Pressing the OK button will clear the date values for all volunteers who have previously electronically signed the agreement. This is useful if you have a newly written agreement and require everyone to re-sign it.



6.11.5. Backup Data Files



At the bottom of the Configuration Settings screen, the paths to the CONFIG and DATA backend database files are shown. You can click the Backup Data Files button to make a copy of the 2 ACCDB files.



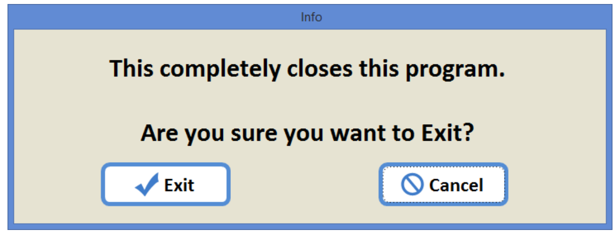
After pressing OK to confirm you want to proceed with backup, select the drive/folder where the files should be stored. It may take a few seconds to then make the backup copies, so please wait.

The copy-date is appended to the name.

6.12. Exit Software

To exit the software, log in as Admin and press the Exit Software.

You will be prompted to confirm the desire to complete exit out of the software:



6.13. Accessing the Desktop

The software was written such that it makes full use of the entire screen, without the usual Windows Close/Minimize controls in the upper left corner (so it's more of a "kiosk" type of application).

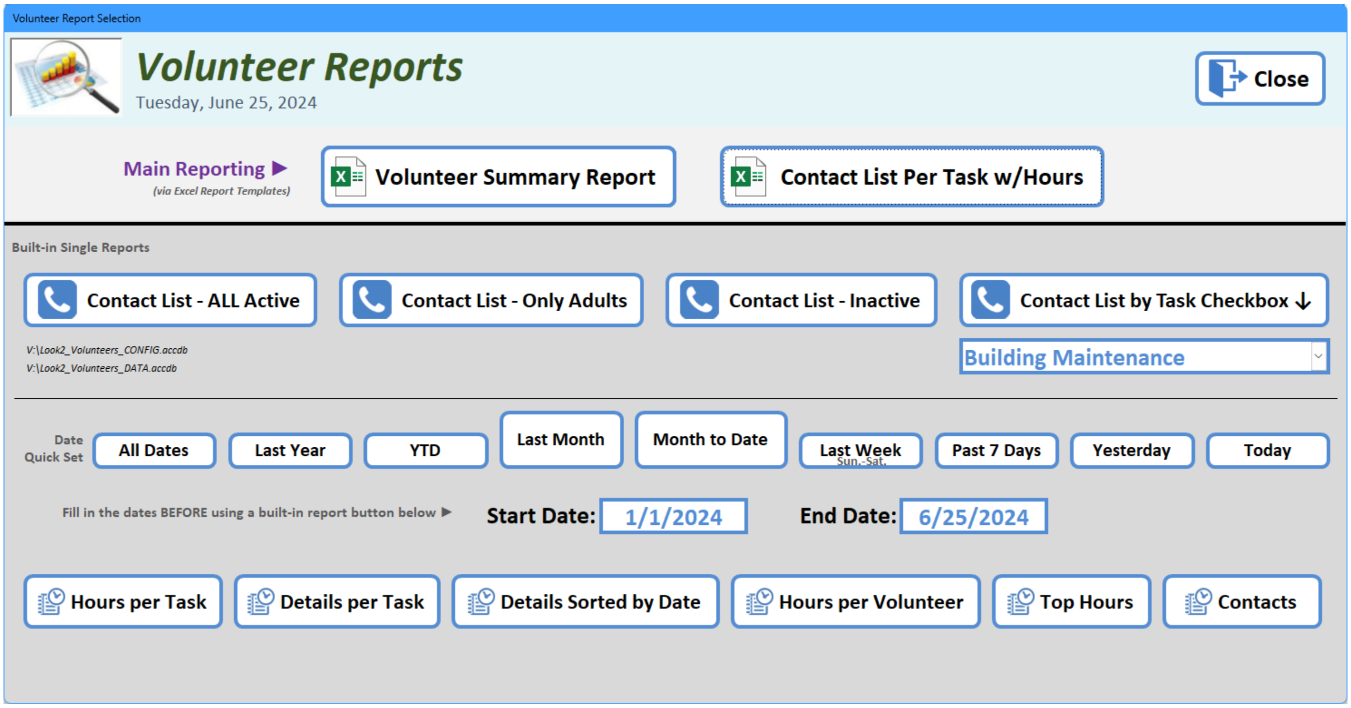
If you want to keep the software running, yet gain access to the Desktop and/or other applications:

- Press the Windows key *(between the CTRL and ALT keys on the keyboard)*. This brings up the taskbar and windows menu, allowing you to then launch another program.

- While holding down the ALT key, cycle through running programs with each press of the TAB key … then let go of the ALT key to bring that window to the front.

7. Reports

Various reports are included with the system, accessible to Administrators via t he Reports button (see previous section). The Volunteer Reports section window appears:



Note: if the system is configured to allow non-volunteer hours, an additional button is shown so you can have a report to include those entries in a detailed report.

There are three main types of reports:

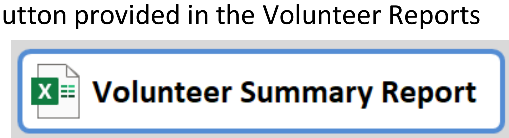
- Main reporting tools via Excel Report Templates
- Built-in Contact Reports
- Built-in Timeframe Based Reporting

Each of these are now explained.

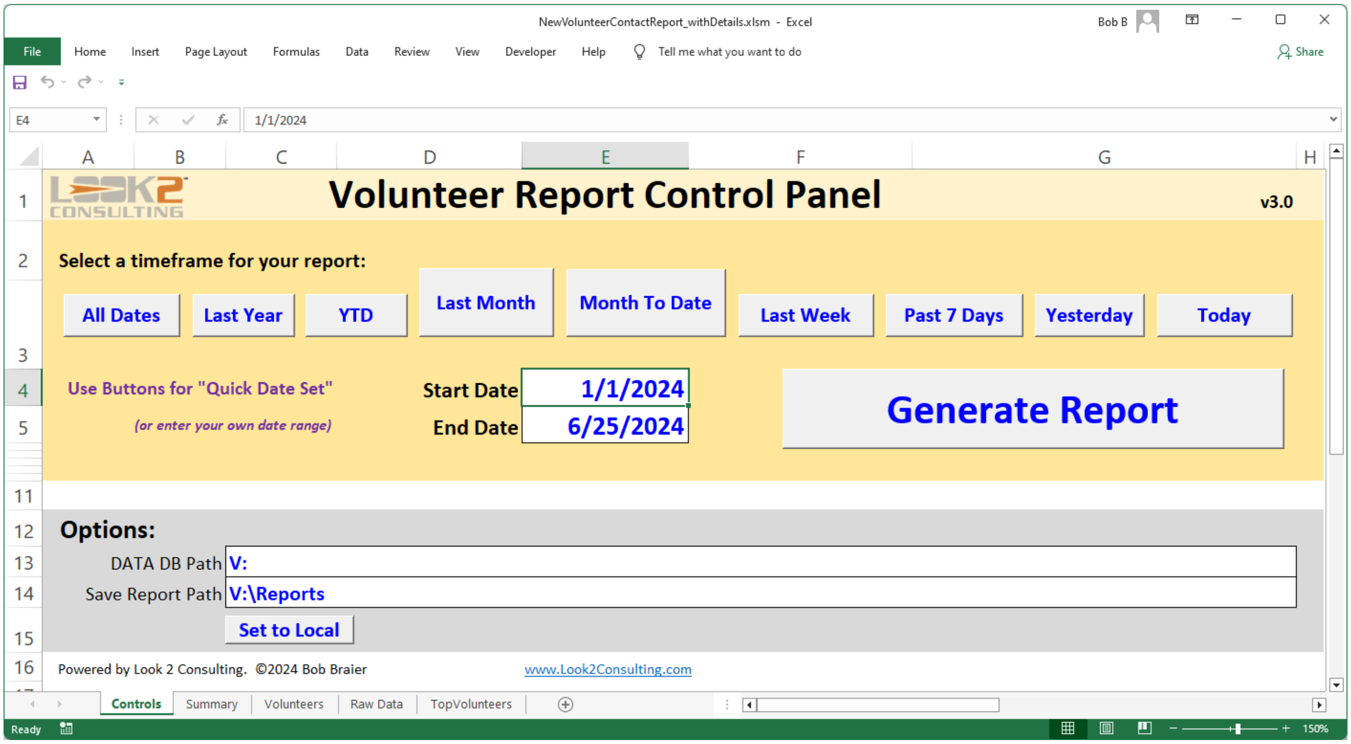
7.1. Excel – Volunteer Summary Report

One of the main reports uses an Excel template to extract data from the database to give both a nice summary of volunteer hours as well as the raw data within a selected timeframe. By having it be available in excel, you are thus not limited to just built-in reports, but rather can customize the reports to fit your organization's needs.

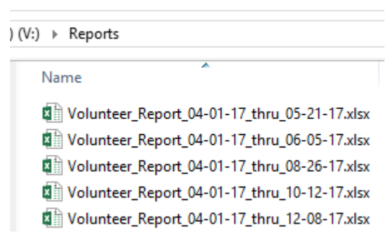
To access this report, either launch it from from the Excel report button provided in the Volunteer Reports screen, or via the desktop shortcut icon (which points to the file *NewVolunteerContactReport_withDetails.xlsm*).

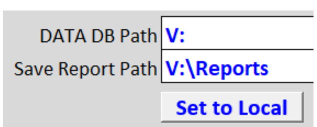


This report shows data for volunteers having hours within the designated timeframe.



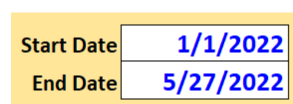
This Excel file uses macros to extract the data from the Access database and stores the results into a separate report file in the /Reports subdirectory (this way the "master template" does not get overwritten), each getting a name with the date range selected.



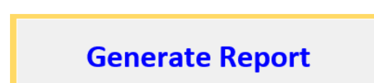


NOTE: the paths used to get the data and then save the reports are options at the bottom of this control page. By default it assumes the software is in the V: drive. Use the Set to Local button or simply edit the fields directly if your installation is in another location, then re-save the template.

The Excel report works with a start/end date range and provides Quick Set buttons to make date entry easy.



Once the date range desired has been entered, press the Generate Report button to initiate the macro which in turn extracts the data from Access and puts it into the Excel report. The macro automatically closes the template and saves the new report.

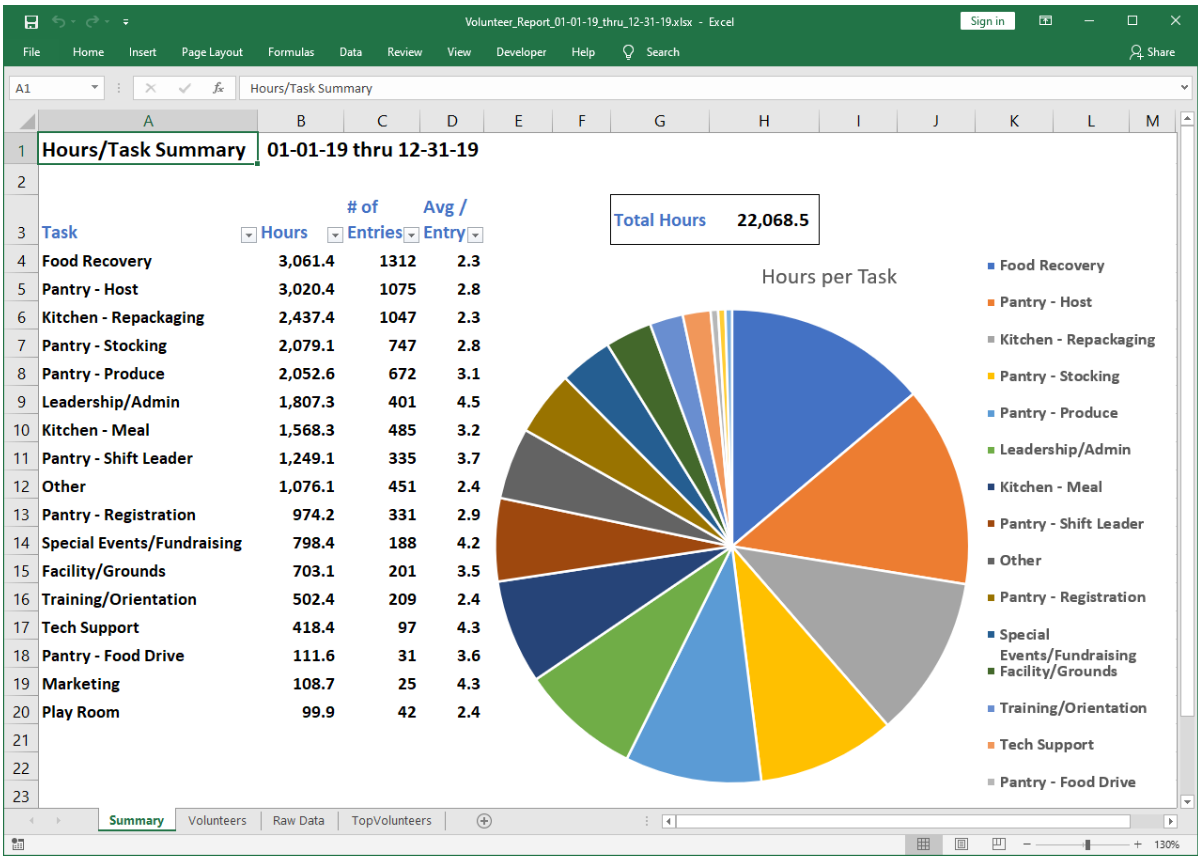


There are 4 worksheet tabs in the generated report: Summary, Volunteers, Raw Data, and TopVolunteers. A summary of each of these are now explained in the next sections.

NOTE: This document does not go into details on Excel training. Please seek out other training materials to learn more about the power of Excel and the features it offers.

7.1.1. Summary Worksheet Tab

The first worksheet shows a summary of the hours worked for each task. It includes both a table of total sum of hours and the number of entries, as well as the average time per entry. It also includes a pie chart of hours per task. There is also a grand total of the hours. As mentioned in the previous section, these are for the timeframe specified in the report generator. An example is shown below:

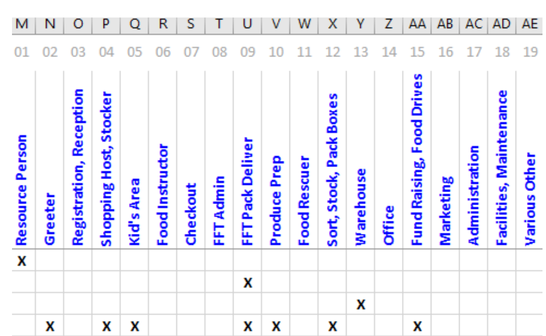


Hours/Task Summary 01-01-19 thru 12-31-19

Total Hours 22,068.5

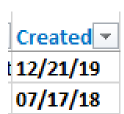
Task	Hours	# of Entries	Avg / Entry
Food Recovery	3,061.4	1312	2.3
Pantry - Host	3,020.4	1075	2.8
Kitchen - Repackaging	2,437.4	1047	2.3
Pantry - Stocking	2,079.1	747	2.8
Pantry - Produce	2,052.6	672	3.1
Leadership/Admin	1,807.3	401	4.5
Kitchen - Meal	1,568.3	485	3.2
Pantry - Shift Leader	1,249.1	335	3.7
Other	1,076.1	451	2.4
Pantry - Registration	974.2	331	2.9
Special Events/Fundraising	798.4	188	4.2
Facility/Grounds	703.1	201	3.5
Training/Orientation	502.4	209	2.4
Tech Support	418.4	97	4.3
Pantry - Food Drive	111.6	31	3.6
Marketing	108.7	25	4.3
Play Room	99.9	42	2.4

7.1.2. Volunteers Worksheet Tab



The second worksheet shows all volunteers having hours logged during the date range specified. It shows their profile fields, including which task(s) have been checked.

There is also a "Created" column, showing the date they first created their account. Click the down-arrow to sort, and you can identify all "new" volunteers … handy if you want to acknowledge them with a thank-you card, follow up with an email, import them into a web site or other scheduling program, make sure they've signed the forms and have been trained, etc.

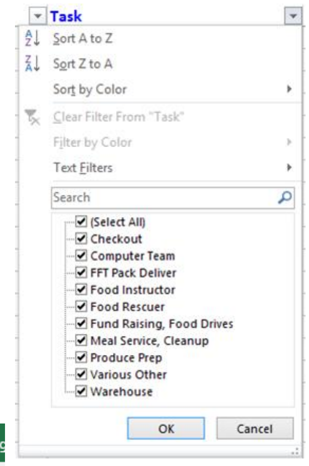


You can make use of Excel's extensive reporting, sorting, and filtering capabilities to thus generate your own sub-reports.

7.1.3. Raw Data - All Volunteer Details Worksheet Tab

The third worksheet shows the Name, Task, Date, and Hours for all volunteer tasks during the given timeframe.

If you want to further filter/sort this list, simply use the built-in functions that Excel provides. The columns already have filtering applied, so you can use the drop-down arrow next to each column header to filter the list shown.

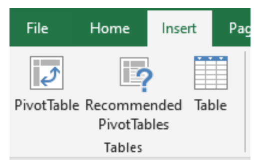


Name	Task	Date	Hours

You can thus show hours just for one task, or for just one person, by simply using the filters provided.

One suggested use of this “raw data” is to insert a Pivot Table.

The example shown below gives the monthly totals for each task for the entire year, totaled by task and by month:



Sum of Hours	Month												
Row Labels	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Grand Total
Facility/Grounds	62	37	28	31	81	89	83	112	53	38	41	49	703
Food Recovery	158	144	197	191	220	303	242	206	221	345	409	425	3,061
Kitchen - Meal	135	145	150	79	136	125	128	138	147	160	69	158	1,568
Kitchen - Repackaging	157	210	219	281	352	215	169	253	142	206	113	121	2,437
Leadership/Admin	89	137	74	110	219	175	107	169	214	288	159	64	1,807
Marketing	13	12		6	5	9	16		27	7	14		109
Other	91	115	124	72	57	78	49	102	111	76	91	109	1,076
Pantry - Food Drive	2	3	5	1	27	25	9		6	1	14	20	112
Pantry - Host	235	214	255	255	284	259	248	340	232	269	213	217	3,020
Pantry - Produce	136	166	194	172	188	142	147	190	161	149	197	212	2,053
Pantry - Registration	89	55	83	83	105	90	62	78	69	98	76	87	974
Pantry - Shift Leader	71	87	110	96	95	91	117	121	107	119	117	117	1,249
Pantry - Stocking	164	192	139	168	147	126	172	187	131	207	229	218	2,079
Play Room	12	12	12	6	12	15	3	5	9	5	7	3	100
Special Events/Fundraising	35	18	69	35	49	78	155	66	104	55	94	40	798
Tech Support	24	21	8	2	51	54	66	47	14	53	47	31	418
Training/Orientation	24	42	23	17	12	36	46	51	52	42	91	67	502
Grand Total	**1,499**	**1,607**	**1,688**	**1,605**	**2,040**	**1,910**	**1,819**	**2,066**	**1,799**	**2,118**	**1,980**	**1,939**	**22,068**

7.1.4. Top Volunteers Worksheet Tab

The fourth worksheet summaries the total hours and number of entries for each volunteer for the timeframe specified. It sorts them in the order of total hours worked.

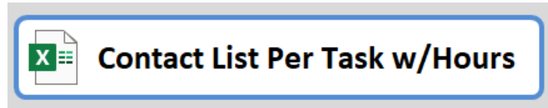
Volunteers - Total Hours	01-01-19 thru 12-31-19	
Name	Hours	Entries

If you pick “Last Month” as the timeframe, you could thus recognize your top monthly volunteers. Simply change the timeframe to an entire year to have a special year-end recognition.

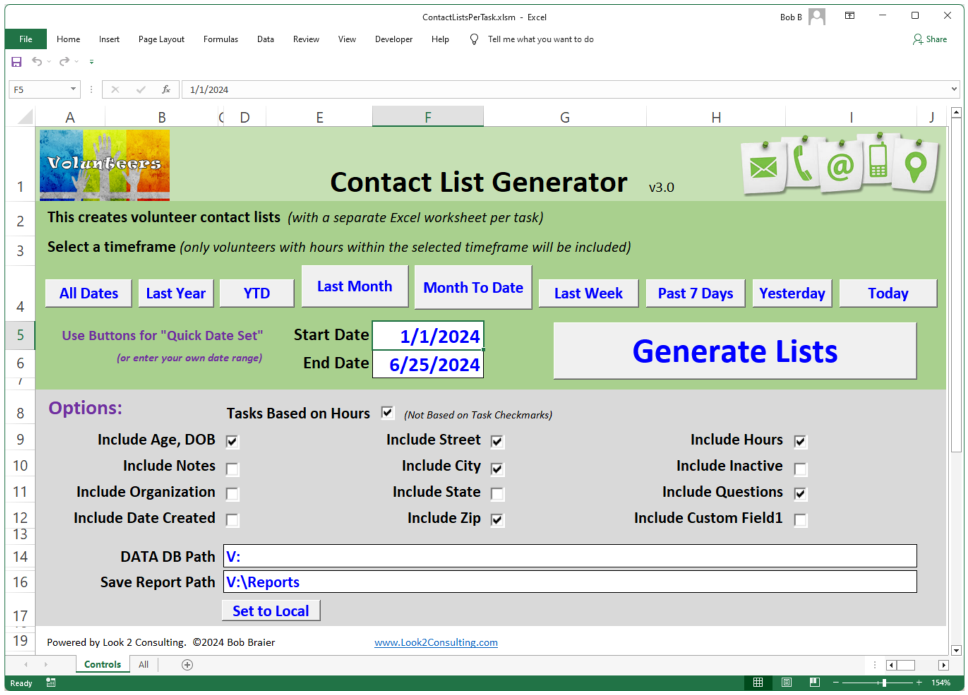
7.2. Excel - Contact Lists Per Task with Hours

The second Excel file supplied is: *ContactListPerTask.xlsm*

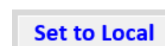
To access this report, either launch it from the desktop shortcut icon, or from the Excel Report button provided in the Volunteer Reports screen.



As with the other Excel file, this one also uses macros to extract the data from the Access database and stores the results into a separate report file in the /Reports subdirectory (this way this “master template” does not get overwritten).

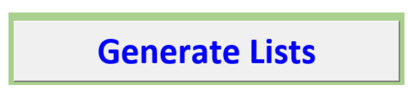


NOTE: the paths used to get the data and then save the reports are options at the bottom of this control page. By default it assumes the software is in the V: drive. Use the Set to Local button or simply edit the fields directly if your installation is in another location, then re-save the template.



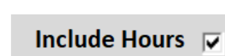
This Excel report file works with a start/end date range: **the contact lists generated will only include those volunteers having hours logged within the selected timeframe.** Use the Quick Set buttons or enter a date range manually. There are also optional fields to include in your contact lists. Simply check desired items. The Include Questions box will also include their answers to the 3 configurable questions.

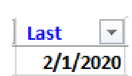
Once the date range desired has been entered, press the Generate Lists button to initiate the macro which in turn extracts the data from Access and puts it into the Excel report. The macro automatically closes the template and saves the new report with the date-range in the filename.



A separate contact list is created for each task defined in your system, with each list appearing on its own worksheet tab. If you have 20 tasks, there will be 20 worksheets plus one that aggregates “All” the tasks.

Include Hours: with this option checked, the lists show total hours for each specific task within the timeframe selected. Total hours for all tasks combine d are shown in the All worksheet. There is also a Last column, showing the most recent date which the task was performed by that volunteer.

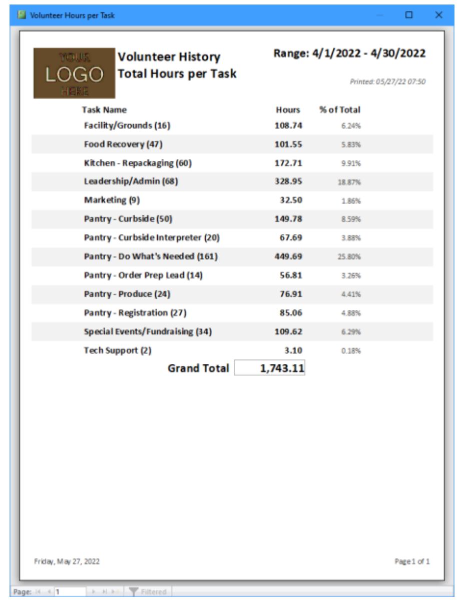




Use the pre-enabled filtering/sorting by clicking on the small arrow in each column heading.

7.3. Built-In Reports: Overview

In addition to the main Excel reporting described in Sections 7.1 and 7.2, the software also provides some built-in reports. Pressing one of the buttons pops up the report in a window that is in “Print Preview” mode.

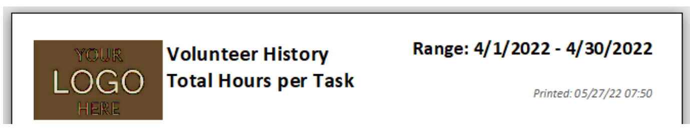


You can press the Maximize Window button to view the report in a larger preview.

Each built-in Access report has common elements.

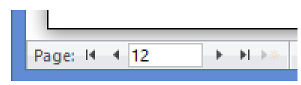
7.3.1. Header

At the top of each report is a header which includes your organization’s logo, the title of the report, the date range selected (if appropriate), and the date the report was created.



7.3.2. Data, Page Control

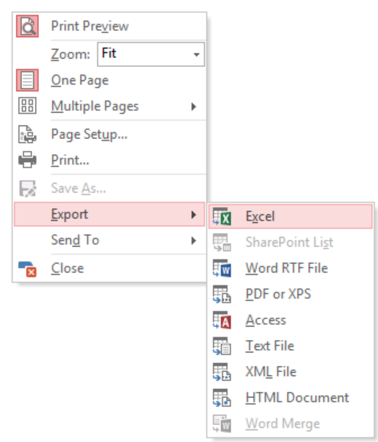
The body of the report contains the result of the query based upon which report was selected. If there is more than one page worth of information, there are page controls at the bottom of the report pop-up window to help you navigate among the various pages, including going forward/back a page, going to the first/last page, or entering a page number directly.



7.3.3. Print/Export

You can quickly print out a report by pressing CTRL-P on the keyboard.

You can also right-click anywhere in the report’s main page to bring up a menu of options. In addition to being able to select Print from this menu, you can also elect to Export the data into various formats, including Microsoft Excel, Word, a PDF file, and other choices.

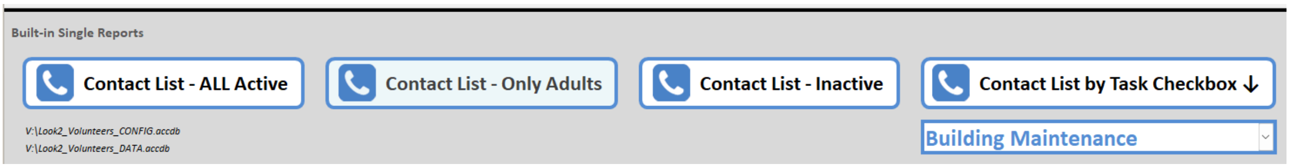


7.3.4. Close Report

When you are done viewing a particular report, close it using the window’s close button in the upper-right corner of the window.
You can also press ALT-F4.

7.4. Built-In Reports: Contact Lists

There are 4 Contact List reports available via the buttons in the middle section of the Reports window.



You can get a basic contact list showing all Volunteers marked as Active, another only showing adults, and a third which shows all those marked as Inactive.

The "Contact List by Task Checkbox" report uses the task selection in the dropdown list below that button. So, to get a list of all volunteers who have checked off a particular task in their profile, first select the task desired and then press the report button.

NOTE: these are NOT time-frame dependent.

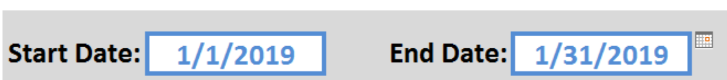
It is typically easier and more powerful/flexible to simply use the Excel Contact List reporting tool. These built-in reports are more for legacy users and special-use cases.

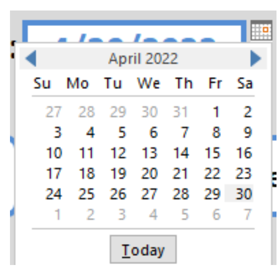
7.5. Built-In Reports: Time-Frame Hours

The bottom section of the Reports screen allows administrators to get reports on Volunteer Hours within a selected timeframe.

7.5.1. Date Range

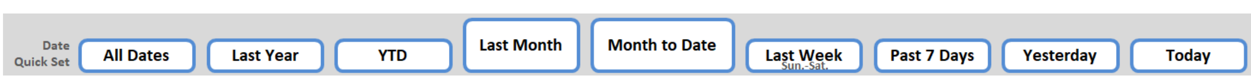
Each of the reports provided use the Start and End Dates shown above those report buttons.





You can edit these 2 dates either directly (by clicking in the box and typing in new numbers), or by pressing the small calendar button that appears to the upper right of the entry field when it has focus (which brings up a pop-up calendar control).

You can also quickly set these 2 dates by using of the of the "Quick Set" buttons provided:



You can also first use the Quick Set buttons and then modify the dates, or any combination so desired.

The bottom line: when you press one of the Hours Reporting buttons, it uses the date range specified.

7.5.2. Hours Summary Reports

There are six built-in Access reports which work in conjunction with the selected date range. The first five give similar results to that shown in the Excel Reports described earlier in this chapter.

Hours per Task | Details per Task | Details Sorted by Date | Hours per Volunteer | Top Hours

They give reports on:

- Hours per Task: similar to the Excel report's Summary worksheet tab, but sorted by task name and with % of total instead of average per entry
- Details per Task: gives the individual entries grouped by each task
- Details sorted by Date: same as the Excel report's Raw Data tab when that worksheet is sorted by the Date column
- Hours per Volunteer: same as the Excel report's TopVolunteers tab when that worksheet is sorted by the Name column
- Top Hours: same as the Excel report's TopVolunteers tab when that worksheet is sorted by the Hours column

7.5.3. Contacts for Today *(Timeframe)*

If you want to get a quick list of people signed in for today to contact them, click the Today button to fill in the timeframe, and then click the Contacts button in the Reports Screen.

Contacts

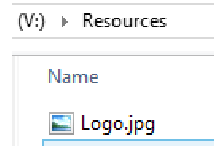
You'll get a report showing their phone and email, along with the task and timeframe.

Printed: 04/29/22 15:46

Name	Phone	eMail	Task	When	Hours
Bob Braier	(608) 469-3198	bob@look2consulting.com	Computer Team	4/29/2022 12:01:00 PM	1
Anonymous User	(608) 000-0000	Anonymous	Food Packaging	4/29/2022 2:51:01 PM	

8. Customization, Configuration

8.1. LOGO



Your organization's logo appears in reports. If your logo changes, simply place the updated image in the Resources subdirectory. It can be either a JPG or PNG.

The software attempts to scale the image to fit the area allocated. To avoid pixilation, it is recommended that your logo is 96 pixels high. As for width, while many logos are roughly "square" (i.e., 96 x 96), some are more rectangular. As long as the image is 96 high, it can accommodate an image up to 132 wide without distortion (beyond that, it will scale the image and may thus appear off-center).

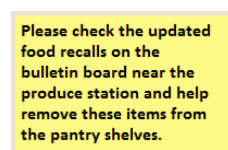
8.2. Volunteer Agreement

You may create your own form which volunteers sign. The PDF is located in the Resources subdirectory. Simply replace it with your own. See Section 2.4 for details on how the software makes use of this file.

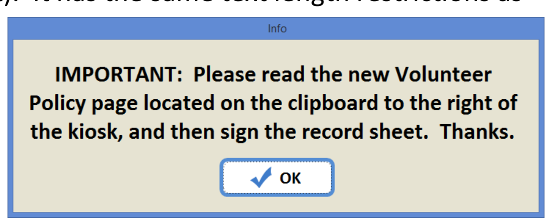
8.3. Parameters

The following items can be configured via the tblParameters table in the CONFIG database:

- **Organization Name** – appears at the top of the Main Screen, and also in the MyHistory report header
- **Require DOB** – Set to "True" if you want date of birth to be a required profile field. Set to "False" if this is to be optional.
- **Tasks Admin Only** – Set to "False" if you want volunteers to be able to select the tasks they are interested in (via their Profile page). Set to "True" if the tasks in the Profile page are to be read-only unless accessed by an Administrator (perhaps for using the task lists not as areas of just interest, but rather marking the areas someone has been trained/qualified for).
- **Sign-in Note** – Specify the text you want to appear over the yellow background on the sign-in screen. If this field is blank, the yellow note will be hidden. If you do enter text, please test it out by looking at the sign-in screen to verify it fits within the space provided (if too much text is entered, it will be cut off). See the example to the right showing an approximate size of how much text is allowed.



- **Sign-in Popup Message** – Specify the text you want to appear when a user first signs in. (This is coupled with the Sign-in Popup End Date described next). It has the same text length restrictions as the Sign-in Note. If this field is blank, the message window will not be shown prior to the sign-in screen. If you do enter text, please test it out by signing in to verify it fits within the space provided (if too much text is entered, it will be cut off).



- **Sign-in Popup End Date** – Specify a date in the format of mm/dd/yyyy which controls the displaying of the Sign-in Popup Message as follows:
  - If blank, the Sign-in Popup Message is ALWAYS shown every time someone signs in
  - If set to today, the Sign-in Popup Message will only be shown once per user (the next time they sign in, even if it's in the future). After someone has successfully logged hours, the message will no longer be shown for that volunteer; so, if you set this mid-day, anyone already signed in would NOT see the message.

- If set to a day in the future, the Sign-in Popup Message is shown every time each volunteer signs in, up to and including when they log in either on or after that specified date.

- **Allow Non-Volunteer Hours** – If set to True, the system offers an additional task on the sign-in screen to allow the hours to be logged, but which are then not included in the basic volunteer reporting.
- **Agreement Days (0 = N/A)** – Number of days after which volunteers must renew their signing of the Volunteer Agreement. If set to 0, it's not enforced.
- **Custom1 Field Label (hide if blank)** – Enter text to show the Custom1 Field in the Profile Screen. That text serves as the "prompt" to define what should be entered into that field. For example, "Languages Spoken" could be the entry in this setting, and then users know to type in any languages they can speak into that profile field. If this setting is left blank, the Custom1 field will not be shown.

8.4. Tasks

You may define up to 20 tasks. These are used to track hours per task, and can be used to generate contact lists which are task-specific (e.g., show all volunteers who do Shopping). Each entry has:

- a Task Name *(keep to less than width provided)*
- a Default Duration for that task *(in hours)*
- a Description *(not currently used)*

Once tasks are defined and volunteers have checked them off in their profile, do NOT move them around or delete/edit them within the backend table directly, as index links are created (and of which a simple direct edit would not properly adjust volunteer profiles). Instead, use the Task Editor to maintain these items. Below is an example of that used by a Food Pantry.

TID	Task	Default Duration	Description
1	Building Maintenance	2.00	Facility volunteers perform various tasks for the building (e.g., cleaning, painting, landscaping, construction, repairs, etc.).
2	Computer Team	1.00	Volunteers help with various computer-related tasks (e.g., Data Entry, Reporting, Software Development/Deployment, and more).
3	Food Packaging	2.00	Volunteers help when we receive large quantities of food which must be further broken down into smaller quantities. (e.g., 5-gallon pails of soup, 50lb bags of flour, etc.)
4	Food Rescue	0.50	Food Rescue volunteers drive to a business to pick up donated food and bring it back to the pantry. Volunteers must be 16+ and have their own transportation.
5	Fund Raising	2.00	Volunteers help with various fundraising tasks, including off-site events, flag campaigns, donation letters, etc.
6	Garden Work	2.50	Garden volunteers work in the Community Garden. Volunteers under 18 must be accompanied by an adult.
7	Host, Stocker	3.00	Hosts escort shoppers through the store to help them make selections based on their household size and any dietary restrictions. We ask that Hosts go through the Pantry at the beginning and end of their shift and fill the shelves where needed with the bas
8	Legal Advocacy	7.00	Legal assistance.
9	Management	6.50	Various roles overseeing the operations of the pantry, including Program Coordinator and the Board of Directors.
10	Marketing	1.00	Marketing volunteers help with such tasks as updating the TV PowerPoint, preparing press releases, photo/video work, etc.
11	Meal Prep	4.0	Volunteers help prepare the Saturday Community Meal.
12	Meal Service, Cleanup	3.50	Volunteers help with serving and cleaning up during the Community Meal on Saturdays.
13	Playroom	2.00	Attend to the needs of the Children's playroom.
14	Produce Prep	3.00	Produce Prep volunteers are responsible for taking in produce donations, rotating produce, preparing produce for display, etc. Volunteers must be 14 years +.
15	Registration Desk	3.00	Registration Desk volunteers welcome patrons and guests to the facility and assist them in registering to receive services and participate in programs. Volunteers must be 18 years +, be a prior pantry volunteer, and have computer skills.
16	Resource Person	4.00	Resource Captains are the "jack-of-all-trades", being able to help out in any role for the day. They help other volunteers with their scheduled tasks.
17	Other	1.00	Any other type of volunteerism not covered by the categories above.

NOTE: in general, it's a good idea to stay away from special characters in the Task Name, including:

" ' \ % $ # ? { } [ ] ( ) ~ ; ! | * >

8.5. City Names, Postal Codes

When volunteers edit their profile, dropdown lists provide pre-defined city names and postal codes (users can type in their own, but these lists help ease the user-input process). You can edit what appears in these lists by changing the entries in the tables: tblCityNames and tblZipCodes.

8.6. Volunteer Questions/Tracking

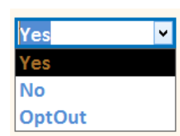
You may define up to 3 optional questions which will appear in the Volunteer Profile screen. These can be used to gather customized data about your volunteers, or may be used to track the status of various items in regards to those volunteers. Per Section 6.11.2, Admins can edit these directly in the software.

The CONFIG file contains the table tblQuestions. There are three rows, each allowing a definition of a specific question and set of answer choices. The fields are as follows:

- **Question** – This is the on-screen question immediately to the right of the answer combo list. Example:
  Are you willing to drive your car for pickup/delivery of food?
  Please test it out to ensure it fits in the space provided.

- **ClarifyingText** – This is the smaller, gray text that appears just below the question to help clarify the question a little further. It's nice to surround it with parenthesis. Example:
  (you can deduct your mileage as a tax-deductible contribution)
  Please test it out to ensure it fits in the space provided. NOTE: this can be left blank (to hide it).

- **AnswerChoices** – These are the multiple-choice answers which will appear in the dropdown list. Answers must be in quotes, separated by a semicolon. Example:
  "Yes";"No";"Maybe"
  Please keep the answers very short/abbreviated, as the answer list is narrow. NOTE: this is simply a means of providing easy-to-use answers for the Volunteers. They can always type in their OWN answer as well (i.e., they are not restricted to the choices shown in the list).

  Date/Today - SPECIAL CASES: If an answer choices is "Date" or "Today", when selected as an answer in the profile screen, today's date will be automatically filled in as the answer. This is helpful if you want to keep track of when a user completes training, or signs a waiver, or other such date-related items.

- **ReportTitle** – You can define what is shown as the column header for any report by entering it in this field. Example:
  Training
  Try to keep it short (perhaps just one word). Please test it out to ensure it fits in the space provided.

- **VolunteerView** – This affects how the question is seen and if it can be answered by the Volunteer directly or only an Administrator. The options for this field are as follows:
  ReadWrite: the Volunteer can both see and answer the question directly (as can an Admin).
  ViewOnly: the Volunteer can only see a disabled Q&A. Only an Admin can change the answer.
  Hidden: the Volunteer doesn't see it all. Only an Admin can see it and change the answer.

Remember: if a question is blank, the associated question/answer/report is hidden or disabled.

IMPORTANT: Once these questions are defined, BE VERY CAREFUL not to change the meaning of these once the software is in use, as the database records with any existing volunteer answers would no longer match! If you must change one, you will have to archive the old answers and then clear them out of that field via the table **Volunteer** (fields PQ1, PQ2, PQ3), so that the new question will start out "unanswered" for the volunteers moving forward.

9. IT Topics

This section covers some miscellaneous topics of interest to IT staff.

9.1. PC Requirements

The system has been designed to work as a local application (i.e., not web-based) on a PC having:

- **OS:** Windows operating system (10 or 11).
- **Display Resolution:** 1920x1080 or 1920x1200 *(at 100% scaling)*
- **Touch Screen:** while a touch screen is not “required”, the software has been designed to work with one and is HIGHLY recommended. An “All-in-one” PC with a 21” or larger screen works great! Conversely, a 14” laptop is too small of a touchscreen.

- **Microsoft Access:** the software has been tested with the desktop version of Office 365, Office 2019, and Office 2016. If you are a non-profit organization, look into getting a discounted copy via Tech Soup: http://www.techsoup.org
- **RAM:** the software needs enough RAM to run the OS, Microsoft Access and Excel. The combinations of various versions can be complex, but it has been successfully tested on a system with 6GB of memory.
- **Speed:** the CPU Benchmark Rating of the computer’s processor should be > 2500. However, if it is getting its data from a Local Solid State Disk (not over networking, etc.), then the rating can go even lower (successfully tested @ 2158).
- **Hard Drive**: the software does not take up much disc space (< 1 Gig), so any modern computer should have adequate disc storage space for the software and its reports. An SSD will improve performance.
- **Networking**: if the software is connected to its back-end databases locally, network speed/reliability should not be an issue. If the linked database files reside on another PC and/or Server, it is strongly recommended that a wired connection with 1G speed be used.

9.2. Files, Archive, Backup

This section covers the main files which comprise the Look2 Volunteer system, and thoughts on making backup copies of not only the system, but daily (or even hourly) backup of the data generated.

9.2.1. Volunteer Files

The main portion of the software has been designed to use these Microsoft Access files:

- **Look2_Volunteers_GUI.accde** – *(or GUI_x32)* contains the forms and programming modules which define the software interface. It has links to the tables in the CONFIG and DATA tables (per below). To more easily deploy the software to multiple sites without having to re-link the files, the software directory gets mapped as a “V:” drive.

- **Look2_Volunteers_CONFIG.accdb** – config db tables: tblCityNames, tblParameters, tblZipCodes

- **Look2_Volunteers_DATA.accdb** – main DATA file which contains tables: History, Tasks, Volunteers

Additionally, there are two Excel file templates which extracts data from the above database files to produce excel reports: ***NewVolunteerContactReport_withDetails.xlsm*** and ***ContactListsPerTask.xlsm***

There are also subdirectories:

- **Resources** – contains files used by the software (Agreement PDF, logo jpg, sound wav files)
- **Reports** – contains the output files generated by the Excel report templates

Because this system works in conjunction with Microsoft Access, there are no other "installed" files; it is all self-contained within the main Volunteers folder (and any shared DATA folder for multi-station installations).

9.2.2. Dropbox/GoogleDrive/Microsoft One-Drive Considerations

While this software has been used with both Dropbox and Microsoft's OneDrive (cloud storage solutions offering automatic backup and remote access), **it is NOT recommended to run the main DATA/CONFIG databases from such drives**.

Rather, it's better to make daily backup copies of your database files to such locations (using the built-in Windows Backup and/or Task Scheduler tools, per section 9.2.3).

The main reason is this: <u>you cannot open the Access databases on more than one client at the same time.</u> Doing so will cause a "share conflict" and result in the creation of multiple copies/instances of the database file(s). Should this happen, you will see more than one copy of the DATA.accdb file, but with slightly different names (the cloud-programs add the user's names in parenthesis, with Dropbox also adding the words "conflicted copy" and the date). The data then diverges into 2 (or more) databases, effectively BREAKING the system! The resulting mess forces you to then try to merge the records from the multiple files back together (not an easy task!).

So, to prevent the database files from opening up more than one copy at one time, only create backup copies to such cloud-based storage directories.

9.2.3. Backup

➲ **IMPORTANT: Creating backups of the system and data is left to your organization's IT staff.**

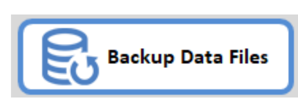
While the task of creating both an initial copy of the Volunteer system as well as frequent backups of the data generated by the system is the responsibility of each organization and varies depending upon the computer systems in place, this section gives an overview to assist in those efforts.

An initial backup snapshot of the system is important to capture the configuration files necessary for the system to run with the settings for a given site.
➲ **Simply make a copy of the entire Look2 Volunteer Software directory and its subdirectories.**

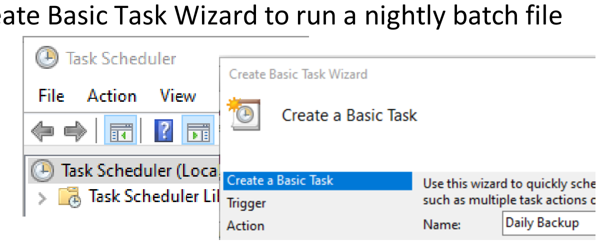
As for regular backups, the primary file that changes on a day-to-day basis is the DATA file. So, unless there are changes to the configuration files (change in logo, passwords, tasks, etc.), there is only one file needing regular incremental backup. The size is very small (e.g. 400 volunteers has a db size < 2MB).

There are many solutions to backing up data. Here are some thoughts to help you with this endeavor.

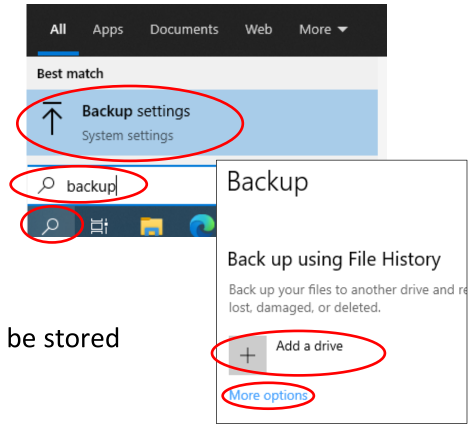
You can make a quick manual backup of the CONFIG/DATA database files using the Backup button in the Settings screen (see Section 6.11.5).



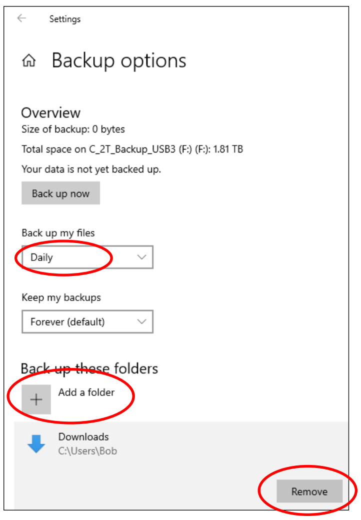
You can use the Windows Task Schedular and use the Create Basic Task Wizard to run a nightly batch file to make copies of just the desired files. To help with the "Program/script:" to use in the Action step of the Wizard, a template for you to modify *(requires knowledge of how .BAT files work)* can be found in the Resources directory:
BACKUP_MakeLocalDatedCopyOfData.bat



You can use Windows Backup to back up the entire Volunteer system (around 20-25Meg). Here is a quick summary of how to use this method to schedule a backup. *(Windows 10)*

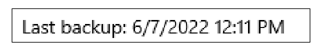


1. Click the Search Icon in the Windows taskbar and start to type "Backup". As you type, you should see "Backup settings" appear in the list.
2. Click on *Backup settings* to launch it
3. Click *Add a drive*, and select where you want your backups to be stored



4. Click on *More options*
5. Select the frequency you want to back up the data (e.g., Daily)
6. Click on *Add a folder,* select where the Volunteer software is installed
7. Remove all folders you do NOT want included in your backup
8. Click the *Back up now* button to initiate the first backup

You can verify backup is working via the Backup options screen, which shows the date/time of the last one:



Windows Backup creates a folder named "FileHistory" in which the files are stored. The date/time of the backup is appended to each name.

9.3. Multi-station Setup

It is possible to have 2 or more Volunteer data entry PC's, all pointing to one common backend DATA DB. The known caveats are:

- you cannot be editing the account (profile, hours, logging out, etc.) of the same person at more than 1 PC at the exact same time*;* only 1 station can be editing data for any given person at that moment *(since simultaneous changes of one person would result in "last write wins" scenarios)*.
- the statistics on the home page only refresh when that workstation has recorded an entry. However, you can click on the main screen's background hand image to update the numbers from other workstations right from the home page.

Typically, you will set up the system such that:

1. each PC has its own GUI and other supporting files
2. each PC maps to a common shared directory (i.e., the V: drive) to access the DATA and CONFIG files *(or re-link the GUI database to point to some other shared drive having DATA and CONFIG via the Linked Table Manager in Access)*

Additional testing of this multi-entry use is required at your specific location. The software is provided as-is and must be tested by you in your own setup/site to determine if it will work for your situation (networking/connection issues, permissions, etc.).

It is strongly recommended that in a multi-workstation environment, all PC's have a 1G Hard-Wired network connection, as wireless connections can be intermittent, slower, and can be subject to slowdowns.

Please refer to the *Volunteer Quick Setup Guide* PDF on the www.look2consulting.com website Support Documents page for more details.