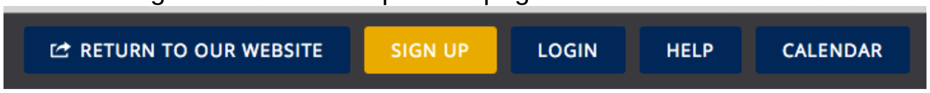
CENTER FOR SERVICE AND LEARNING

Instructions for using iServe as an Organization Manager

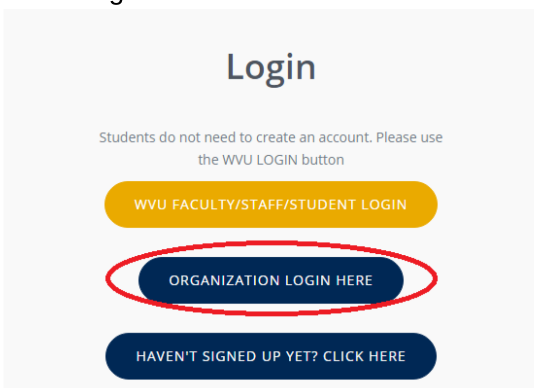
Getting Started

Getting started in iServe is quick and easy! Follow these simple steps.

1. Go to http://iserve.wvu.edu/
2. Click the Login button at the top of the page:



3. Click the gold WVU LOGIN button on the next page:



4. You will be redirected to the organization manager page.
5. Your login will be the email you listed at registration.

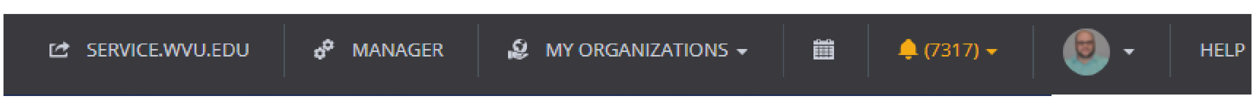
Managing Your Organization Page

To manage your organization, you will go to the Organization Manager View. This area of iServe allows organization managers to perform all of these tasks, listed below:

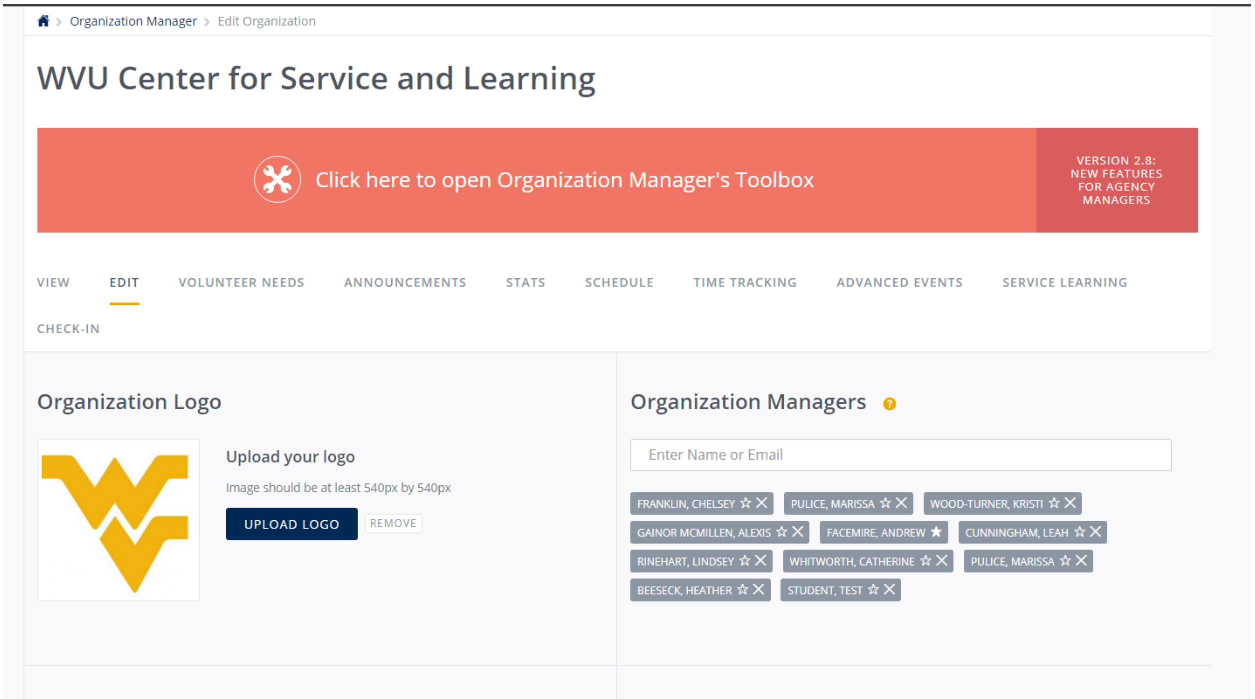
- Edit an organization's profile
- Post needs and announcements
- View organization stats (user views, fans, responses, and hours)
- Approve or reject submitted volunteer hours
- Message individual volunteers
- Export need, event, volunteer, and response information
- Post needs for advanced events and service learning.
-

Opening the Organization Manager View

To access this view, click the **My Organization(s)** button at the top of your screen.



After clicking this button, you'll see the name of your agency, the Agency Manager's Toolbox resource, and various tabs to access different areas of your agency manager view.



Available Resources in Organization Manager View

As an organization manager, you have a number of resources available in this area of Get Connected. Help resources are there if you have questions, need to sign up for trainings, or want to reach out to your admin. This is also the area where you can edit your agency's profile pages, add needs, and perform other agency-management tasks.

View	View your agency's profile page as a visitor to the site would see it.
Edit	Edit your organization’s profile page; add agency managers; add photos.
Volunteer Needs	Post new volunteer need sand manage existing ones. You can also select to view inactive needs.
Announcements	Post a new announcements and manage existing ones. You can also select to view inactive announcements.
Stats	View statistical information that iServe stores for your site. This tab shows profile views, fans, need responses, and hours submitted for the past month. You can change the date range as needed.
Schedule	View the individuals who are scheduled to volunteer for your organization in a selected month.
Time Tracking	Approve (or deny) submitted volunteer hours.

Posting and Managing Volunteer Needs

Creating New Volunteer Needs

1. Click **Volunteer Needs** in the **Organization Manager View**
2. Click **Add New Need** to open the **Create Need** form.
3. Complete the fields in the form. Fields are described below.

Field	Description
Title	Enter a need title. **Tip:** Avoid generic titles such as "Volunteers Needed"; try to be specific with your titles.
Description	Enter a need description. If training or a background check is required, you can include that information here.
Initiative	Select the initiative, if applicable, with which to associate the need. **Note:** This may not be an option on your site if initiatives are not used, or if your site's settings have hidden this field.
Duration	Select a duration. Options are **Ongoing**, **Runs Until**, **Happens On**, **Custom Shifts**, and **Recurring Shifts**. For needs associated with a particular date, users can search by date, and also by "soonest first." **Notes:** For all duration types except **Ongoing**, you will have the option of entering a need capacity (i.e., the number of volunteers needed) and time(s) and indicating a date after which people can no longer respond. See below for more information. For ongoing needs, the volunteer will be able to specify what day(s) they are available to volunteer.
Capacity	If applicable, enter the number of volunteer slots available for this need.
Allow Team Registration?	Indicate whether or not you want to allow team registrations. When searching needs, users can filter needs by which opportunities accept (or don't accept) team registrations.
Family Friendly?	Indicate whether the need environment is family-friendly. Volunteers can search specifically for family-friendly needs.

Outdoors?	If you select **Yes** to indicate an outdoor need, you will have the opportunity to provide inclement weather plans. Volunteers viewing this need will see this information in the **Details** area at the bottom of the need-information page. They will also be able to search all needs on your site by which ones are (or are not) outdoors.
Wheelchair Accessible?	Indicate whether the need will be wheelchair-accessible. Volunteers viewing this need will see this information in the **Details** area at the bottom of the need-information page. They will also be able to search all needs on your site by which ones are (or are not) wheelchair-accessible.
Attributes	If you want additional details to stand out from the description above, include them here. Each detail (attribute) must be 200 characters or fewer. Attributes appear in the **Details** section at the bottom of the need-information page.
Address	Enter the address of the opportunity.
Zip Code	(required) Enter the zip code associated with the opportunity. Users can search needs by ZIP codes.
Impact Area	Select the applicable impact area. If unsure, select N/A and the CSL staff will place it for you.
Interests & Abilities	Select interests related to the need. Your selections will help the site to match up this need with potential volunteers. Users can also search needs by interest.
Additional Notification Recipients	If you wish to have certain people copied on all responses to this need, toggle this option **On** and type each email address on a separate line.
Waiver	If a waiver is added, a volunteer must indicate that he or she agrees to it before they can complete their need response. Click **Choose File** to select the waiver to upload. Acceptable file formats are .doc, docx, and .pdf.

4. Click **Create Need**.

Opportunity Scheduling: Posting Needs with Shifts

When posting a volunteer opportunity in iServe, you'll need to select a duration type (Ongoing, Runs Until, Happens On, Custom Shifts, or Recurring Shifts).

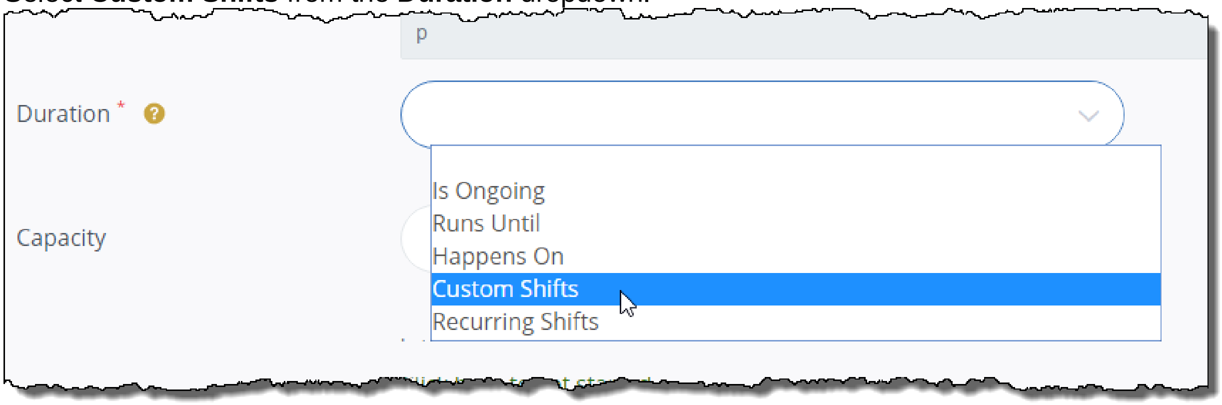
Custom Shifts

Custom shifts are those that don't occur at the same time each day. Here are some examples of needs that would fit into the "Custom Shifts" category:

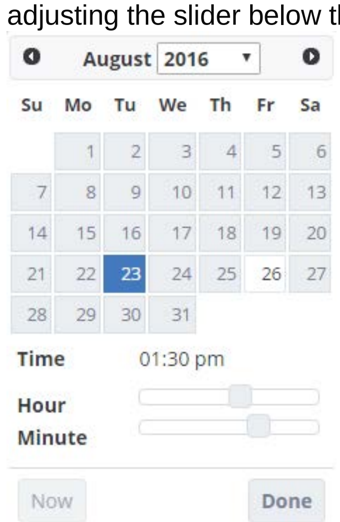
- Multiple shifts within a single day, such as serving shifts at a soup kitchen
- Shifts that occur at different times on different days
- Shift that may occur at the same time but require a different number of volunteers each time

Assigning Custom Shifts
The instructions below assume that you are already on the **Create Need** page, which you can access by going to your agency manager view, clicking **Needs** and then clicking **Add New Need**.
To assign custom shifts to a need:

1. Select **Custom Shifts** from the **Duration** dropdown.

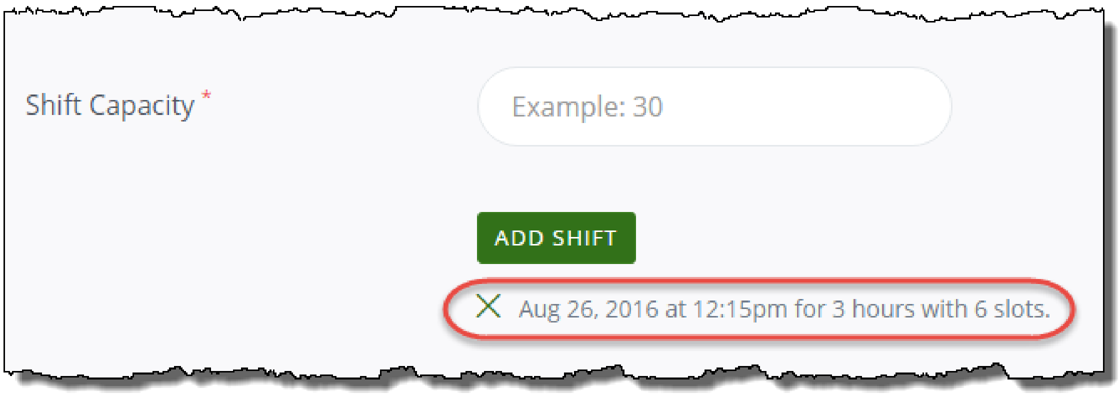


2. Complete the three **Shift** fields that appear. These fields are described below.

Field	**Description**
Shift Date/Time	Click inside this field to view the date/time picker. Choose the date of the shift from the calendar. Choose the time by adjusting the slider below the calendar. 
Shift Hours	Indicate how long, in hours, the shift will last. Decimals (such as 2.5) are allowed. **Note:** Type the number only; do not include the word "hours" or any other text.

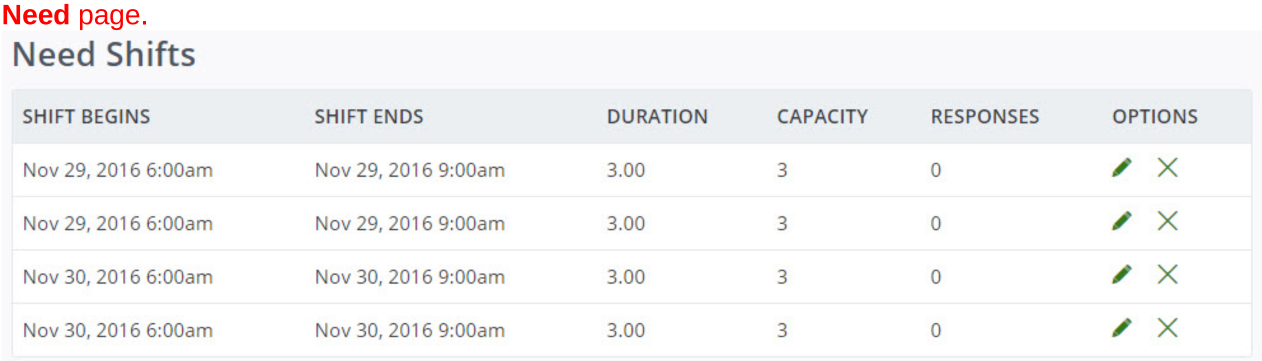
Shift Capacity	Type the number of volunteers that are needed *per shift*. For example, if you are posting three shifts that require two volunteers each, you would type **2** (not **6**). **Note:** In the volunteer view, the total number of volunteer spots will be shown. Using the above example, volunteers will see that the need has six volunteer spots. After clicking to learn more, the volunteer will see that two spots per shift are needed.

3. Click **Add Shift**.
   Once you have added a shift, two things happen: The shift is displayed right below the **Add Shift** button (shown below) and the **Shift Date/Time**, **Shift Hours**, and **Shift Capacity** fields are cleared.



4. Complete steps 2 and 3 for all additional shifts for this need. Each time you add a new shift, it will be added to the listing.
   Note: To remove a shift, click the **X** to the left of it, shown in the previous image.
5. Complete all other required and applicable fields for the need (**Allow Team Registration**, **Address**, **Interests & Abilities**, etc.)
6. Click **Create Need**.

Note: Once you have clicked **Create Need** for a Custom or Recurring Shift need, you cannot change the duration type.
Once the need has been created, **Need Shifts** table is displayed at the bottom of the **Create Need** page.



Need Shifts

SHIFT BEGINS	SHIFT ENDS	DURATION	CAPACITY	RESPONSES	OPTIONS
Nov 29, 2016 6:00am	Nov 29, 2016 9:00am	3.00	3	0	
Nov 29, 2016 6:00am	Nov 29, 2016 9:00am	3.00	3	0	
Nov 30, 2016 6:00am	Nov 30, 2016 9:00am	3.00	3	0	
Nov 30, 2016 6:00am	Nov 30, 2016 9:00am	3.00	3	0	

As volunteers respond to the shifts, the numbers under the **Responses** heading will be updated.

Note: To edit a shift, click the **Edit** (pencil) icon for the shift. You can edit the start date, start time, end date, end time, and capacity. Once you have saved the new information, you must refresh your screen to see the change reflected in the **Need Shifts** table. You will also be prompted to reach out to anyone who responds.

Recurring Shifts

The "Recurring Shifts" option is for repeating shifts of needs. Here are some examples:

- An agency serves food seven days a week and needs volunteers to work dinner shifts, 5 p.m. to 7 p.m.
- A thrift store needs volunteers to sort donated clothes on the first Saturday of every month.
- A nonprofit needs volunteers to tutor students after school on Wednesdays

The **Recurring Shifts** designation is for *shifts that occur at the same time of day.* If your shifts occur at *different* times, whether within the same day or on different days, you should use the **custom shifts** designation instead.

Cloning Needs

You can use iServe's "Clone Need" feature to post multiple needs that are very similar. This feature is particularly useful when:

- You have different needs occurring at the same location
- You have the same need occurring at different locations (such as a Reading Buddies event occurring at different library branches)
- You want to post a more current version of an expired or inactive need

Note: In the past, the "Clone Need" feature was recommend for posting shift needs. With Opportunity Scheduling for shifts, however, this is no longer necessary.

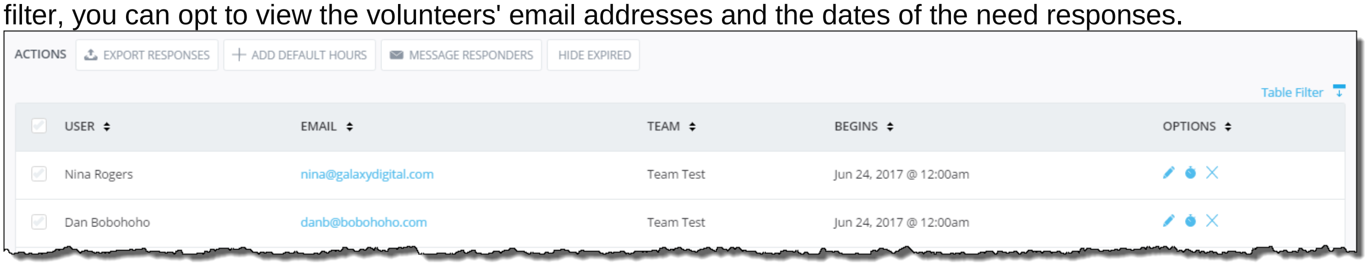
1. Open the need you wish to clone.
2. Click **Clone Need** (located at the bottom of the screen), and then click **Yes** to confirm. Get Connected displays the cloned need. This need is identical to the base need, with one difference: The title includes the word "copy" in parentheses.
3. Update the title by (1) removing the word "copy" and (2) indicating the new shift. In the above example, your new title might read, "Guest Guides - Afternoon Shift."
4. Update the need details as required.
5. Click **Update Need** to save the cloned need.

Managing Volunteer Need Responses

As an organization manager, you can view all need responses, including shift responses. To do so:

1. In your organization management area, click **Needs**.
2. Beneath the need title, click **Responses**.

The **Responses** table lists volunteer names, teams, (if applicable), and need dates. Using the table filter, you can opt to view the volunteers' email addresses and the dates of the need responses.



You can perform the following tasks from this page:

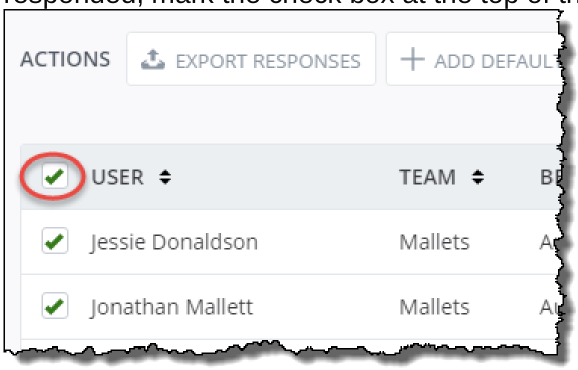
- Export responses to a spreadsheet
- Add a volunteer response
- Remove a volunteer response
- Email your volunteers

In addition, you can adjust the table to view more (or less) related data.

Export Volunteer Need Responses

This feature is helpful for creating a list of respondents for emails and sign-in sheets! To export responses from the **Responses** table:

1. Access the **Responses** table for the need, by clicking on the **Responses** button of the need (see above)
2. Mark the check boxes next to the responses to export. To select all volunteers who responded, mark the check box at the top of the column.



3. Click the **Export Responses** button (shown in the previous image).

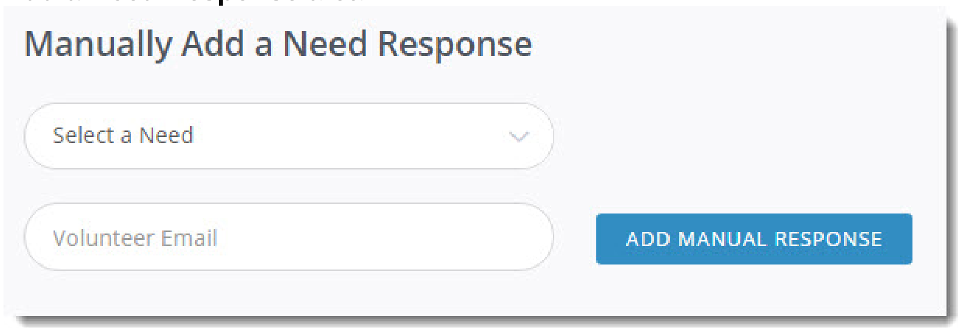
The response export includes the following information:

- Response ID
- Date the response occurred
- Need title
- Initiative (as applicable)
- Need or shift ID
- Shift start date, start time, and duration (if a shift need)
- ID of the person who agreed to the waiver (if a waiver is involved)
- Volunteer's first name, last name, email address, phone number, company, address, and any notes submitted when responding to the need
- Team name and leader (if the volunteer is part of a team response)
- Answers to any need-response or initiative questions specified by the site manager

Add A Volunteer Need Response

To add a need response on behalf of a volunteer:

1. Go to the **Needs** section of your Agency Management Area and scroll down to the **Manually Add a Need Response** area.



2. Select the applicable need from the **Select a Need** dropdown. If applicable, select a shift as well.
3. Type the volunteer's email address into the **Volunteer Email** field.
4. Click **Add Manual Response**. You will get a confirmation message once the response is logged by the system.

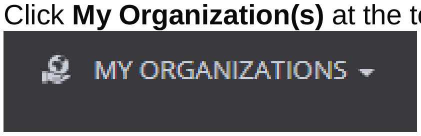
Approving Volunteer Hours

The CSL requires that *all volunteer hours* at WVU be verified by you, our community partners. Students **must submit all volunteer hours themselves**. If a student encounters difficulty in tracking their hours, please direct them to the CSL staff for assistance.

Once they have submitted their hours, your primary organization manager will receive notification via a daily system email. **Note:** Volunteer hours associated with service-learning module needs will generate a separate email and are approved using a different process; please see the instructions provided by our Faculty Program Coordinator for more information about service-learning module hours.

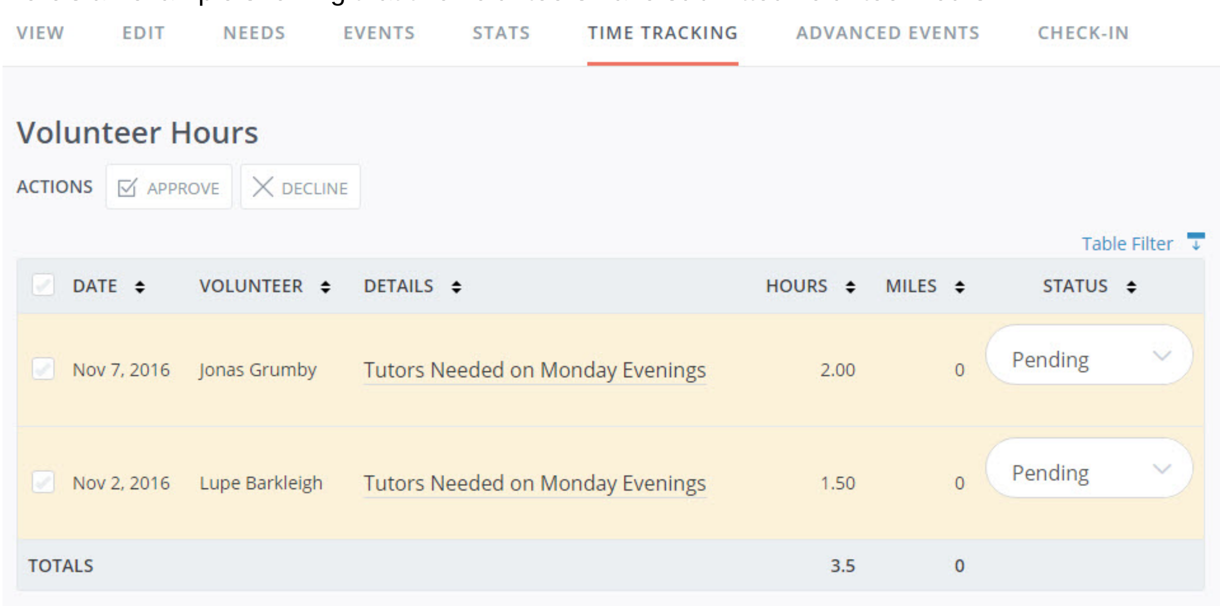
To approve hours, follow the below steps:

1. Log into iServe
2. Click **My Organization(s)** at the top of your screen to access the Agency Management Area.

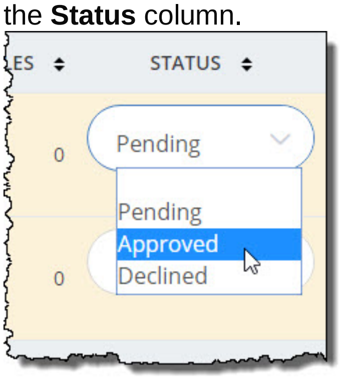


Note: Depending on your site's settings, this button may say **My Organization**, **My Program**, or something similar instead of **My Agency**.

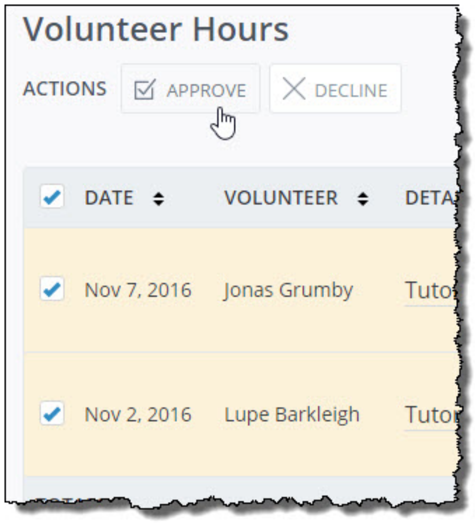
3. Click **Time Tracking** in your Agency Management Area to view a table of all pending hours. Here's an example showing that two volunteers have submitted volunteer hours:



4. To approve (or decline) hours for a single volunteer, select from the applicable dropdown in the **Status** column.



To approve (or decline) hours for multiple volunteers, select the hours to approve and then click the **Approve** or **Decline** button as applicable. (Mark the checkbox at the top of the column to select all.)



In this example, the agency manager has selected all pending hours and is approving them in bulk.

5. Click **Yes** to confirm.

Once you've approved the hours, they will disappear from the **Time Tracking** tab. From this point, you can view them under the **Stats** tab of your Organization Manager Area, under the **Active Need Hours** heading.

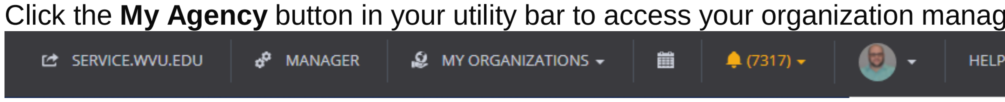
Viewing Organization Statistics

As an organization manager, you can use your **Stats** area to get a sense of volunteers' engagement with your agency's profile page and posted needs and events.

Accessing and Viewing Agency Data

To view agency statistics:

1. Click the **My Agency** button in your utility bar to access your organization management area.



2. Click **Stats**.

Your **Stats** area has four main sections:

- **Fields/button to specify a date range:** Default is the past month.
- **Total fans and views:** Totals shown are for the date range specified. Views include both logged-in users and visitors, and repeat views count as separate views.
- **Active Need Responses:** All responses that have been submitted during the specified date range. Data include response ID; need ID, name, and date; and volunteer name and email.
- **Active Need Hours:** All approved volunteer hours for the selected date range.

Exporting Agency Data

The **Stats** area includes buttons for exporting need responses an hours. These exports include data not shown in the table on your screen. Columns for each export are provided below.

Need Responses Export

This export includes:

- Response ID
- Response date

- Need name
- Shift ID, start date and time, and duration (if the need is a shift need)
- Volunteer first name, last name, email, phone, company, and address
- Any notes provided by the volunteer when responding to the need
- Team name and team leader (if the volunteer is part of a team response)
- Answers to any additional questions added by the site manager

Hours Export
This export includes:
- Date of the volunteer work (*not* the date the hours were submitted)
- Need title
- Hours volunteered
- Miles traveled (if submitted)
- Answers to any hours-submission questions added by the site manager
- A description of the hours (if submitted)
- The source of the hours, if not manually entered by the volunteer (e.g., if the hours were exported or applied automatically through volunteer check-in)
- The status of the hours (Approved, Denied, etc.)
- The volunteer's first name, last name, and email address
- The volunteer's team, if they signed up with a team

Have additional questions?

- Links and Information: Get Help
- Contact: You can direct questions to iserve@mail.wvu.edu or call us at 304-293-8761.