Bloomerang Volunteer

Web Application User Guide

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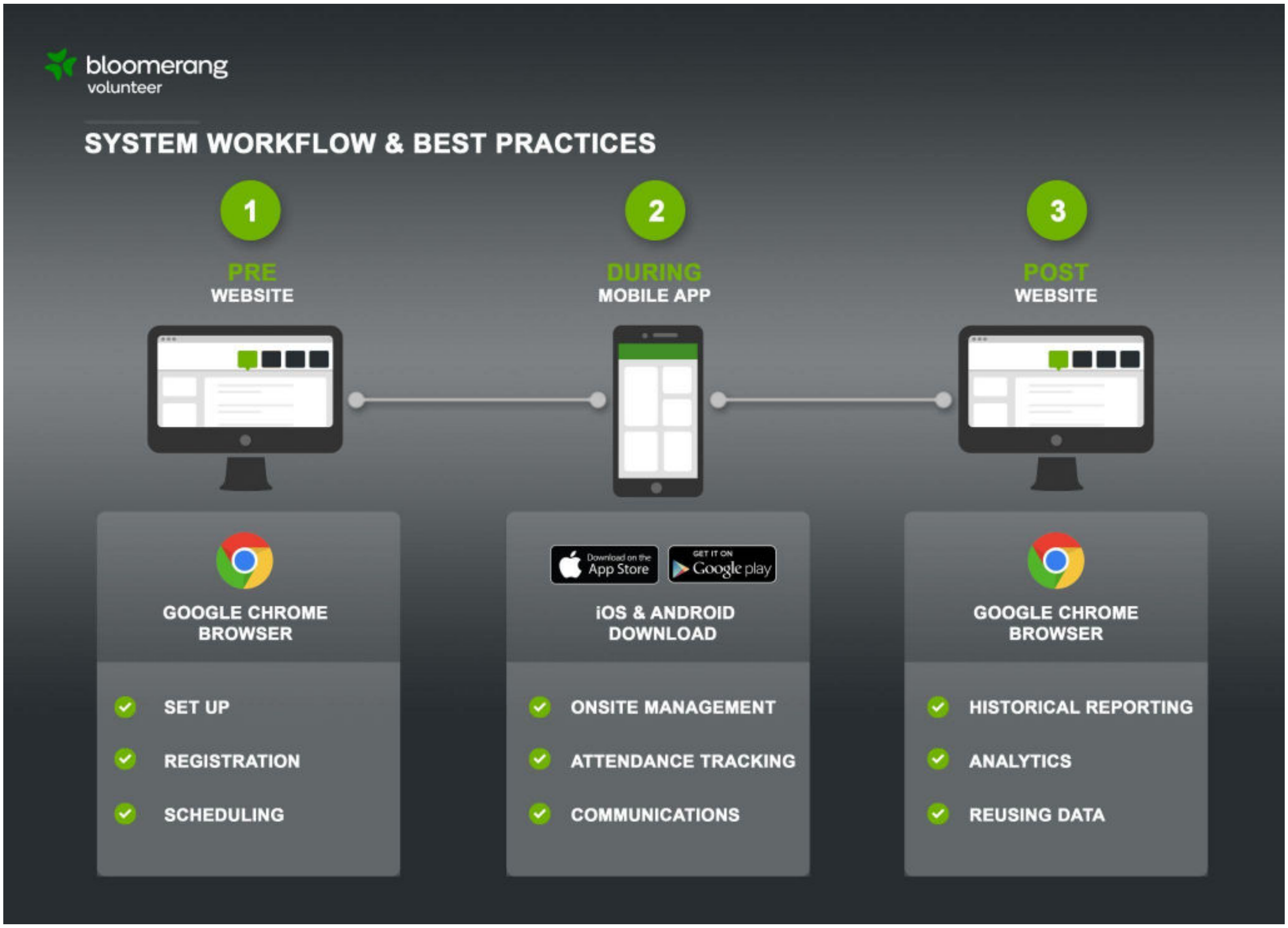
Chapter 1

Getting Started: Understanding the Architecture and How it Works

How the System Works for Administrators/Managers and Best Practices

The manager workflow for every Opportunity can be broken up into three stages: Pre, During and Post operations. Each stage has a best practice!



❶ Pre-Opportunity

What is 'Pre-Opportunity'?

Pre-opportunity takes place before the opportunity, schedule or program starts, and typically includes the setup, registration, scheduling and rostering of staff/volunteers.

Best Practices

For this stage in the workflow, the best experience is to use either a desktop PC or a Mac that uses Google Chrome, the supported browser of Bloomerang Volunteer.

♦ Tips and Tricks

To ensure Bloomerang Volunteer is fully up to date with the latest and greatest features, in the browser settings, empty cache and hard reload.

❷ During-Opportunity

◈ What is 'During-Opportunity'?

During-opportunity takes place while the opportunity, schedule or program is happening where typically real-time communication, attendance tracking, and on-site management is required.

✪ Best Practices

For this stage in the workflow, the best experience is using the native Bloomerang Volunteer mobile application. The Bloomerang Volunteer mobile app is available to download free on the Android Google Playstore and iOS App Store.

⚙ Basic Settings

- *LiveMode™*: The Mobile App can only be used once the setting is enabled through the web interface.

✔ Pros of the Mobile App

LiveMode™ activates a powerful communication tool, helps track team members, and enables managers to adapt to changes during the opportunity.

✘ Cons of the Mobile App

The mobile app is not designed to manage the pre-opportunity stages of the system workflow, therefore features that enable schedule setup, registration, recruitment are not available.

♦ Tips and Tricks

To ensure the Mobile Apps are fully up to date with the latest and greatest features, make sure you have the most recent version available from the store and that automatic updates are enabled.

3 Post-Opportunity

What is Post-Opportunity?

Post-opportunity takes place after the opportunity, schedule or program has finished and typically includes reporting and analyzing the data collected during the opportunity such as hours worked and attendance history.

Best Practices

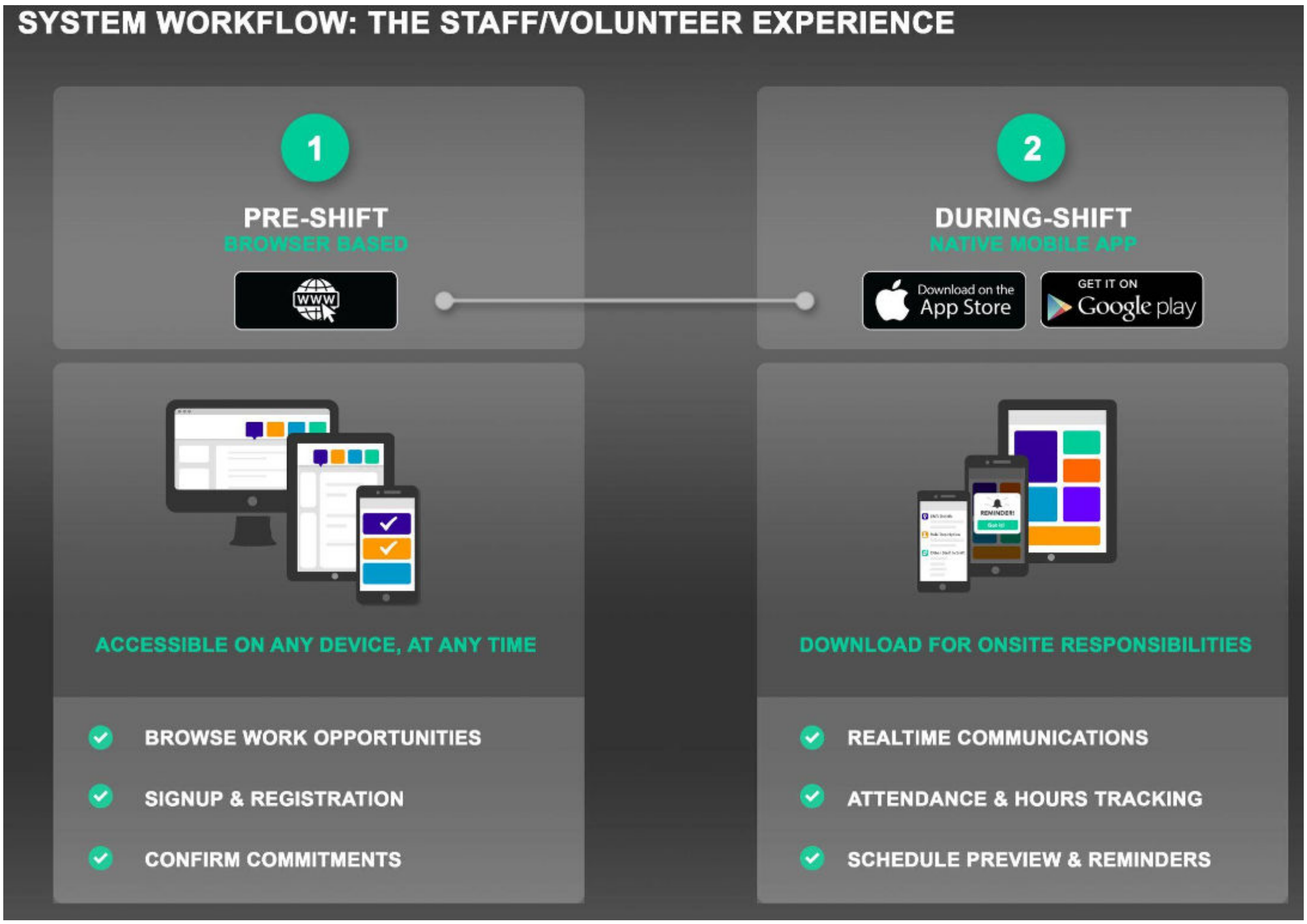
For this stage in the workflow, the best experience is to use either a desktop PC or a Mac that uses Google Chrome, the supported browser of Bloomerang Volunteer.

Tips and Tricks

To ensure Bloomerang Volunteer is fully up to date with the latest and greatest features, in the browser settings, empty cache and hard reload.

How the System Works for Staff/Volunteers and Best Practices

The staff/volunteer workflow for every Opportunity can be broken up into two stages: pre-shift and during-shift. Each stage has a best practice!



❶ Pre-Shift

What is a Pre-Shift?

Pre-shift takes place before the opportunity, schedule or program starts and typically includes browsing work opportunities, signing up and registering, along with confirming commitments to work.

✪ Best Practices

This stage in the workflow is entirely browser-based so that anyone on any device can easily and seamlessly access the signup opportunities. The best and fastest browser experience will be on Google Chrome.

⧫ Tips and Tricks

To ensure Bloomerang Volunteer is fully up to date with the latest and greatest features, in the browser settings on the device, empty cache and hard reload.

❷ During-Shift

◈ What is During-Shift?

During-shift takes place while the opportunity, schedule or program is happening. Typically, this stage involves communication, attendance tracking and personal schedule reminders.

✪ Best Practices

For this stage in the workflow, staff and volunteers are encouraged to download the native Bloomerang Volunteer mobile application, although it is not mandatory.

The Bloomerang Volunteer mobile app is available to download free on the Android [Google Playstore] and iOS [App Store].

⚙ Basic Settings

- Permissions: Managers can control the information Staff/Volunteers have access to, along with features and functionalities within the application.
    - *For example; you can disable Staff/Volunteers from tracking their own attendance and only allow their supervisors to access that functionality.*

⧫ Tips and Tricks

- Bloomerang Volunteer has a 3-tier communication system, which means if Users do not download the mobile app, they will receive all communications, notifications and reminders via SMS, or, via Email.

- Collecting the Mobile Phone Number *(Template Question)* on the registration form will make the 3-tier communication system work more effectively.

- To ensure the Mobile Apps are fully up to date with the latest and greatest features, make sure you have the most recent version available from the store and that automatic updates are enabled.

✔ Pros of Using the Mobile App

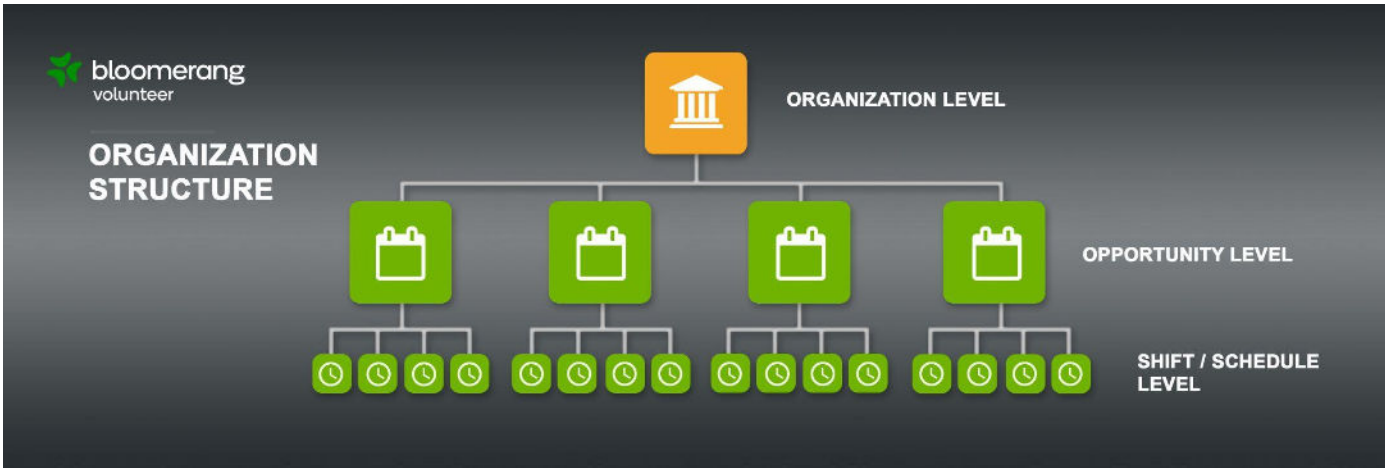
LiveMode™ activates a powerful communication tool, helps track team members, and enables managers to adapt to changes during the Opportunity.

✘ Cons of using the mobile app

The mobile app is not designed to manage the pre-shift stages of the system workflow, therefore features that enable schedule setup, registration, recruitment are not available.

Organization Structure

Bloomerang Volunteer has three main levels that can be architected to suit your organization's needs.



Options for Architecting

As there are multiple ways to set up Organizations, Opportunities and Schedules, it is important to determine the best course of action when doing the initial set-up. This involves making decisions on what level to recruit and store data at, the type of Opportunities you plan on running and how the schedule should be built out. The flexibility of Bloomerang Volunteer will allow you to customize your Opportunities to fit your needs.

❶ Organization Level

- **What is the Organization Level?**

The Organization Level is the highest level of architecture in Bloomerang Volunteer. An Organization can be the company, association, or committee that is responsible for an Opportunity, Schedule or Ongoing Program. In order to create an Opportunity, Schedule or Program, it must be bound to an Organization. Multiple Opportunities, Schedules and Programs can be created and conducted within the Organization database.

- **What Data is Stored at the Organization Level?**

The Organization will store all historic data and provide easy access to copy and manage data across multiple Opportunities, Schedules or Programs. Organization Administrators are provided with a high-level overview of activity taking place within the Organization. Additional insight is provided into Staff, Qualifications, Recruitment and

Opportunities, and stored at the highest level. Organization Level data can always be transferred down into the Opportunity Level.

◈ How to Define an Organization?

Defining an Organization is flexible and can be tailored to fit the needs of the Opportunity, Schedule or Program that is being run. The Organization can be a main point of recruitment for the Staff/Volunteers or it can be used at a managerial level to look at historical data and generate reports to check on how the Opportunities/Schedules/Programs are performing.

◈ How to Leverage Multiple Organizations?

A standard use case for customers is operating all Opportunities, Schedules and Programs under a single Organization. However, there are some enterprise scenarios that may require multiple Organizations where the data needs to be kept separated and different Administrative capabilities are needed depending on region. In these cases a single customer can be part of multiple Organizations.

✔ Pros of using Multiple Organizations

- Data will remain siloed across organizations and will not carry over across Users.

✘ Cons of using Multiple Organizations

- If you have the same Users in both Organizations, there runs a risk of data duplication.

⚙ Basic Settings / Actions

- Gated Application/ Manual Approval: Must require an Administrator to approve or reject Users into the Organization.
- Open Registration/ Automatic Approval: Organization is open for anyone to register to, with no barriers to entry.
- Customized Registration Workflow: Administrators can customize the data they want to collect on Users when they register to the Organization and tailor the workflow.
- Language: Multiple languages can be applied to an organization so that Users registering can experience a seamless workflow in their native language.

- Reporting across Opportunities, Schedules and Programs: advanced reporting options collects data across all activity within the organization.

- Signup Visibility of Opportunities: When Users are part of the Organization, Administrators can control who can see certain signup opportunities based on their Qualifications. *For example, the loud Fireworks Events can be hidden from Users with a hidden PTSD qualification.*

✪ Best Practices

- If there are multiple Opportunities or Events throughout the year, the Organization level should be used for recruitment and managing the database of Staff/Volunteers.

- If recruiting from the Organization level the Manager will need to ensure that all form questions, qualifications and the signup workflows have been addressed prior to opening registration.

- All information collected at the Organization Level can always be transferred down to the Opportunity Level to avoid data duplication. If running multiple Opportunities and are recruiting from the Organization Level, it is best to set up all Form Questions and Qualifications at the Organization Level.

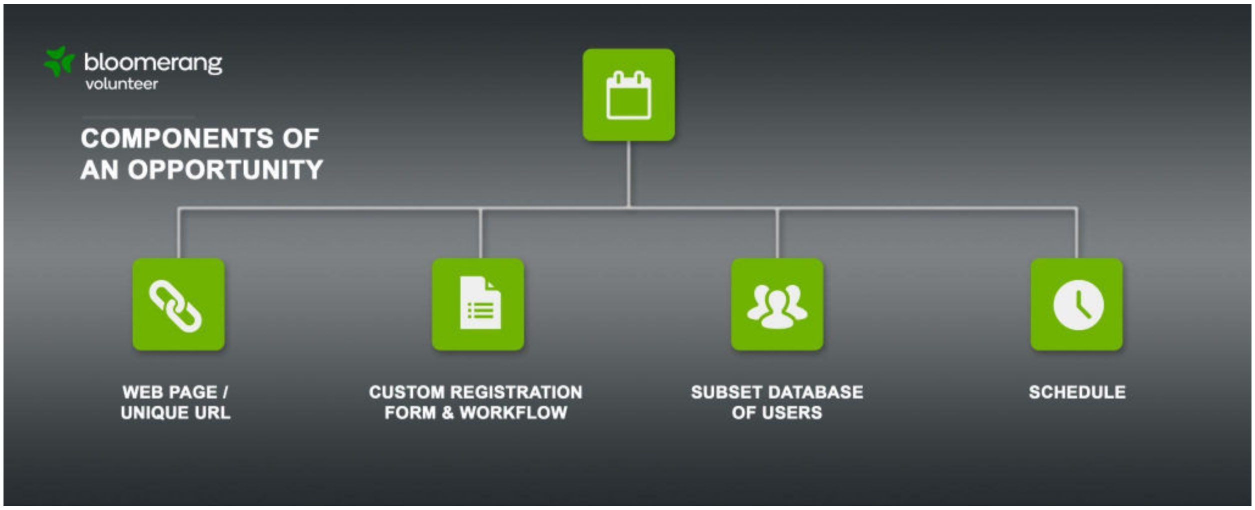
❷ Opportunity Level

What is the Opportunity Level?

The Opportunity Level is the second level of architecture in Bloomerang Volunteer and lives below the Organization Level. Each Opportunity contains its own dataset that is isolated from the other Opportunities within the Organization. This ensures that there is no concern about data contamination across Opportunities. However, if desired there is the ability to copy certain data across Opportunities such as Users, Roles, Qualifications and even the Locations. Multiple Shifts and Schedules can be conducted within a single Opportunity.

What Data is Stored at the Opportunity Level?

The Opportunity will store all historic data that occurs within it including Scheduling information, Hours Logged, Form Question Answers, Notes and more. Opportunity Managers are provided with a high-level overview of the activity taking place within the Opportunity. Organization Level data can always be transferred down into the Opportunity Level, however Opportunity-specific data will not be transferred up into the Organization Level.



How to Define an Opportunity?

An Opportunity can be defined as many things including: a one-time festival, a quarterly schedule, a volunteer program with no schedule, an ongoing initiative, a single shift, a weekend sports tournament, or even a small concert requiring few staff. Opportunities within Bloomerang Volunteer are so flexible and can represent a variety of use cases allowing Managers to create Opportunities for any occasion.

An Opportunity is simply just a container for the following unique datasets that can be leveraged independently from each other:

- A Public Page / Unique URL
- A Registration Form
- A subset database of Users *(which includes attributes such as Qualifications)*
- A Schedule *(which includes attributes such as Roles and Places)*
- A Single Date and Time range

It is up to the Administrator which components they want to leverage within the Opportunity.

How to Leverage Multiple Opportunities?

A standard use case for customers is operating all activity under a single Opportunity. However, some enterprise scenarios require a very large Opportunity to be split out into multiple smaller Opportunities *(sometimes by Role or by Venue)*. In these cases a single User or Administrator can be part of multiple Opportunities.

✔ **Pros of using Multiple Opportunities**

- Data will remain siloed across Opportunities and will not carry over across Users.
- Each Opportunity will have a unique registration workflow.
- Users will be alerted when there are scheduling conflicts across Opportunities.

✘ **Cons of using Multiple Opportunities**

- Administrator visibility and communications can become difficult to navigate.
- There runs a risk of data duplication.

◈ **Basic Settings**

- Customized Registration Workflow and Signup Visibility: Opportunity Managers can customize the data they want to collect on Users when they register to the Opportunity and tailor the workflow by setting custom parameters.
- Permissions: Opportunity Managers can customize the information that other Administrators have access to, along with blocking or allowing scheduling capabilities.
- Schedule Settings: Set parameters and notifications surrounding the schedule.
- Attendance Settings: Choose the framework on how hours-worked are tracked along with administrative permissions.
- Language: Multiple languages can be applied to an organization so that Users registering can experience a seamless workflow in their native language.
- Mobile App Settings: Control when the mobile app can be accessed and set permissions on what data people can see.

◈ **Basic Actions**

- Bulk Actions: All actions in an Opportunity can be done individually or in bulk. For example, Clock-in multiple Users, leave bulk star ratings across staff or Roster multiple people into multiple shifts in one action.

- *RosterMode*™: Bloomerang Volunteer will match staff to opportunities based on aligning attributes.
- Messaging: Communicate with your team via email and optionally embed their schedule.
- Confirmation Requests: Allow your Users to confirm their schedule and trigger actions based on their answers.
- Notes and Star Ratings: Leave detailed notes and start ratings on Users in the Opportunity. This is one of the unique sets of data that will amalgamate at the Organization Level and be transferred up from the Opportunity Level.
- Reporting: advanced reporting options collect data and activity within the Opportunity.
- Exporting: All Opportunity data can be exported in a custom view via CSV.

✪ Best Practices

- Make sure all of the key information is filled in before opening the Opportunity to the public.
- Double check your notification settings and the automatic actions that can be triggered.

⧫ Tips and Tricks

- Avoid Data duplication: Set up Form Questions and Qualifications at the Organization Level if the same ones are used across all Opportunities.
- Save time with copying:
    - Copy the entire Opportunity and choose to include Users and their Scheduled status, or simply just copy the schedule without the previous Users.
    - Roles, Qualifications and Venues can be copied from Opportunity to Opportunity to save time in re-entering data.
    - Shifts can be copied to increase the speed of Schedule creation.
- Increase speed by doing it in bulk: all actions in the Opportunity can be done individually or across multiple entities, for example updating Shift information or assigning attributes to staff members.

- Opportunity specific branding will help staff/volunteers be sure to register for the right Opportunity.

❸ Schedule/Shift Level

◈ What is the Schedule / Shift Level?

The Schedule / Shift Level is the third level of architecture in Bloomerang Volunteer and lives below the Opportunity Level. Within the Schedule, multiple Shifts can be conducted. These Shifts are isolated from other Shifts in the Schedule and are independent from one another, containing their own dataset. Multiple partitions of the Schedule are also available within the Opportunity and can be achieved through a variety of settings, including by Place, Role, Date, etc.

**Details on how to achieve this can be found later in the document in Chapter 8.*

◈ How to Define the Schedule?

Typically, a Schedule is associated with a start and end date, but it is not strictly bound to that; Schedules can also be ongoing / never ending. The Schedule within Bloomerang Volunteer can be set up in several ways. Depending on the Opportunity Type, the Schedule can consist of recurring daily/weekly Shifts, or it can contain a variety of one-time Shifts.

⚙ Basic Settings / Actions

- Visualizations: Administrators can customize how they want the Schedule displayed including both dynamic List and Calendar views.

- Multiple Views: Administrators can choose the point of view for how the information on the schedule is displayed. *For example, the Schedule can be viewed by Staff, by Role or by Shift.*

- Bulk Actions: All actions on the Schedule can be done individually or in bulk. *For example, extending Shift times or changing Locations*.

- Robust Filtering and Search Capabilities: Quickly target the data you need, and hide unnecessary information.

- Schedule Settings: Block certain actions, set parameters and change notification settings.

- *RosterMode™*: Bloomerang Volunteer will match staff to opportunities based on aligning attributes.

How to Define a Shift?

A Shift is strictly associated with a start and end time, along with a place. Depending on the complexity of the Schedule *(especially if it is an ongoing or quarterly schedule)*, Shifts can also be considered smaller "Opportunities".

Basic Settings

- A Shift contains many attributes that can be populated including date, time, Place, Roles, unique descriptions and more.

Basic Actions

- Users can be manually assigned to a Shift by a Manager, or, depending on the setting, Users can self-signup to the Shift.
- Changes to a Shift can be done Individually or in Bulk.

How to Leverage Multiple Schedules Within the Opportunity?

Multiple Schedules within an Opportunity can be achieved through a variety of different views and by grouping series of Shifts. *For example, if the Opportunity has multiple Venues, you can filter the Schedule to only display Shifts in one particular Venue.*

Best Practices

- Always double-check the Schedule settings and Notification settings before opening it up to the public.

**More information about setting up the Schedule can be found in Chapter 8.*

Best Practices: Managing Different Schedule Types

Opportunities and Schedules are very unique, and some Organizations can have a combination of different Schedule types. Find out what is best for your Organization.

➊ Ongoing Schedule

Programs that run on a daily/weekly/monthly basis, or are ongoing with no specific end-date and typically have a lower volume of Users.

✪ Best Practices

If running an ongoing or never-ending Schedule, it is best to break that Schedule out into multiple Opportunities *(For example, monthly, quarterly, annually, etc)*. The reason for this is to keep the data fresh and up-to-date, and to properly archive historical data. Historical data within an Opportunity can always be manipulated by Administrators at any point in time. If the Opportunity happens over a longer period of time, it might be best to break it out into multiple Opportunities. Doing this can help reduce the risk of historical information being accidentally changed.

♦ Tips and Tricks

- The dates of the Opportunity / Schedule / Program displaying on the Public Page does not restrict the Schedule from operating beyond those days.
- If the Shifts in the ongoing Schedule are recurring on a weekly basis, make a Shift once and then copy it to all the relevant dates. This will help save time when creating the Schedule.

➋ Fluid / Flexible Schedule

The Schedule doesn't exist until users provide their Availability and Shifts are created based on when they are free and are often changing.

✪ Best Practices

Always collect Availability from the Users. Once they have been placed into the Schedule or into a Role, it will be important to get them to confirm their placements and heavily monitor the status of their confirmations.

❸ One-Time Schedule

The Schedule, regardless of its complexity, has a predetermined start and end date. Typically seen with Medium to Large scale Opportunities *(such as an Event)*, that have a higher volume of Users and usually span a day, over a weekend, or over a couple of weeks.

✪ Best Practices

One-time Schedules can have many complexities including different permission levels, multiple Venues and a large number of Users. It is best to operate the Schedule under a single Opportunity.

♦ Tips and Tricks

Multiple Schedules within an Opportunity can be achieved through a variety of different views and by grouping series of Shifts. *For example, if the Opportunity has multiple Venues, you can filter the Schedule to only display Shifts in one particular Venue.*

❹ No Schedule

The Opportunity container is <u>not</u> being used primarily for Scheduling purposes.

✪ Best Practices

If the Opportunity does not require structured Shifts, do not use the Schedule. When the Opportunity is acting as a container for tracking General Attendance, or as a way to collect information on Users, it is best to leave Shifts out. It may be more confusing than helpful when Users are registering.

♦ Tips and Tricks

If simple timeblocks or tasks are required in the Opportunity, you can always label your Roles or Qualifications with a Date and Time stamp.

Best Practices: Managing Different Opportunity Types

Opportunities and Schedules are very unique, and some Organizations can have a combination of different Schedule types. Find out what is best for your Organization.

➊ Large Scale Opportunities

Large scale Opportunities typically include a complex schedule, have over 300+ staff/volunteers, and use multiple permission layers. These Opportunities also tend to occur one-time or annually.

☼ Several Large Opportunities

If the large-scale Opportunities are repeat-Opportunities, recruitment from the Organization level will allow Administrators to collect and reuse information on the Users across the Opportunities. This will also allow staff/volunteers to see all of the Opportunities as signup opportunities.

☼ One-time Opportunity

If the large scale Opportunity is only occurring once, or is a unique occurrence for the Organization, recruitment from the Opportunity Level will keep the data siloed from the rest of the Organization and permissions can be granted to Administrators for the one-time purpose.

☼ Massive Opportunity *(ie. Olympic-style)*

If the Opportunity is massive and includes multiple area coordinators and thousands of Staff and Volunteers, it will be best to break down the Opportunity into multiple smaller Opportunities *(possibly based on Place, or by Role)*. This will allow each coordinator to manage their own schedule and will help streamline communications.

♦ Tips and Tricks

- Creating all custom form questions at the Organization level will make it easier for staff/volunteers to sign up for several Opportunities, as they will never have to fill out the same question twice.
- The recruitment workflow at the Organizational Level may not be as obvious to the staff/volunteers if the Public Page is not branded properly and instructions are not included.

- When recruiting from the Opportunity Level, make sure the branding is specific to the Opportunity so that it will be more attractive to potential volunteers.

❷ Medium Sized Opportunities

Medium Sized Opportunities typically include a less complex schedule and don't require a robust amount of permission layers, as they typically only include 50-300 volunteers. Medium sized Opportunities tend to occur once, annually or are repeated several times throughout the year.

Several Medium Sized Opportunities

If the medium sized Opportunities are repeat-Opportunities, recruitment from the Organization Level will allow Administrators to collect and reuse information on the users across the Opportunities. This will also allow Staff and Volunteers to see all Signup Opportunities.

One-time Opportunity

If the medium Opportunity is only occurring once, or is a unique occurrence for the Organization, recruitment from the Opportunity Level will keep the data siloed from the rest of the Organization and permissions can be granted to Administrators for the one-time purpose.

Tips and Tricks

- Opportunities can be easily copied *(especially if there is little variation year over year!)*

❸ Small Opportunities

A small Opportunity typically includes a handful of staff/volunteers per Opportunity, and has similar qualities of a Shift. For example, 5 volunteers need to show up at a specific location for a certain amount of time.

One Small Opportunity

If running only one small Opportunity, leveraging the Schedule might not be necessary. Simplify the Staff/Volunteer workflow by including the details for time and place on the registration page as part of the description. Avoid a complex signup workflow by reducing the amount of registration steps that are enabled.

Many Small Opportunities

When running many small Opportunities, it is best to group those Opportunities together under one ongoing Schedule. Use the Shifts in the Schedule to be the individual Opportunities. By doing this, it will help simplify the workflow for staff and volunteers, as they will always be directed to the same link to register and sign up for more Shifts.

✪ Best Practices

When running many small Opportunities, it's best to recruit at the Organizational level, allowing staff to have visibility across the multiple Signup Opportunities.

❹ A Mix of Everything

When running a variety of Opportunity types, it will be important for Administrators to leverage multiple styles of registration workflows.

✪ Best Practices

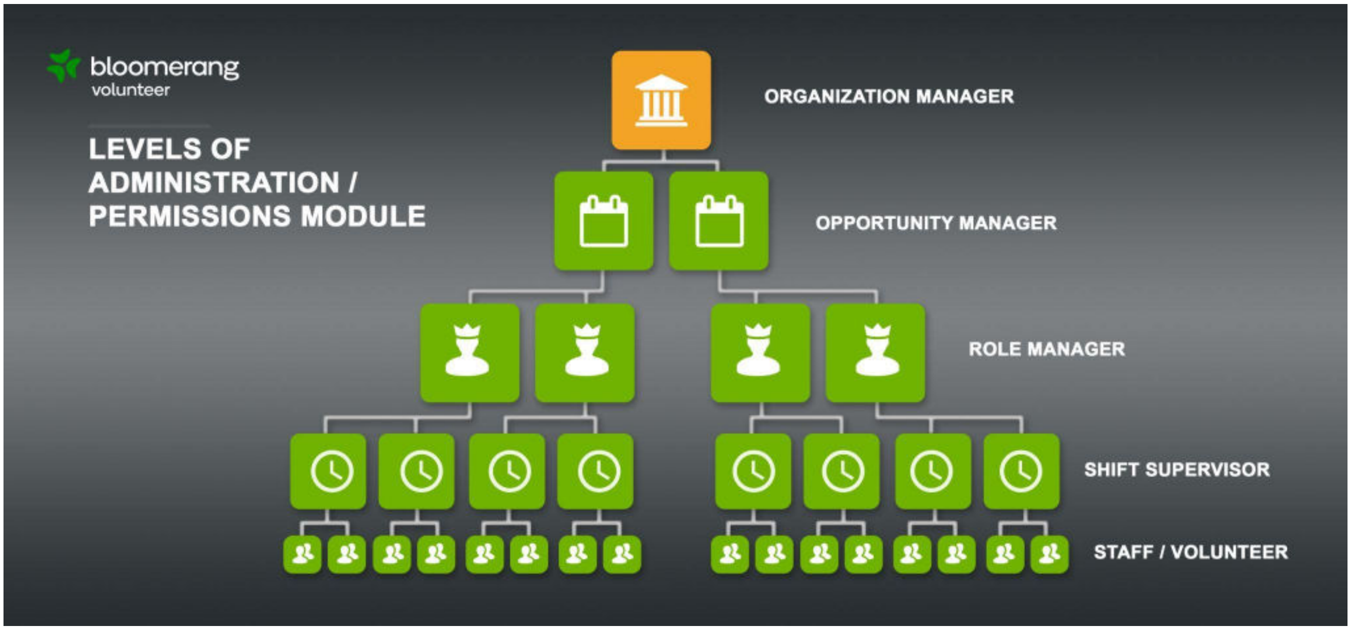
Use a base registration workflow at the Organization Level for all of the ongoing programs and schedules, while using the Opportunity specific workflows in tandem for the independent/one-off Opportunities. This hybrid workflow approach will allow Administrators to collect general data as well as very specific data from the staff/volunteers.

⧫ Tips and Tricks

- If some of the ongoing staff/volunteers in the Organization decide to register for a one-time/independent Opportunity, all of their information will automatically be carried down from the Organization Level, avoiding data duplication and re-entry of information.

Levels of Administration and Permissions

Bloomerang Volunteer has a variety of permission levels that can be architected to suit the administrative requirements of your organization.



Permissions

Levels of administrative access can be granted or restricted from Users using a series of permissions. Bloomerang Volunteer has five main levels of administration that can be tailored to fit any need, allowing Administrators to control who can access what information, and who can take what actions.

➊ Organization Manager

◈ What is an Organization Manager?

An Organization Manager is the highest level of permission within Bloomerang Volunteer, providing visibility across all administrative levels. There is no limit to the amount of Organization Managers the Organization can appoint. This level of permission can access, create, and manipulate all historical and upcoming data across the Organization and within all of the Opportunities.

✪ Best Practices

Organization Managers have access to all of the data within the system, including any hidden or sensitive information. It is best to ensure that anyone assigned this Administrative access can be trusted and will be responsible with the data that they can access.

➋ Opportunity Manager

◈ What is an Opportunity Manager?

An Opportunity Manager is the second level of administration, falling below the Organization Manager level. Opportunity Managers oversee everything within a specific Opportunity/Schedule/Program and can Add, Edit or Delete anything within the constraint of the Opportunity. For Example, they are able to create the registration workflow, manage the schedule, and grant additional permissions to other Users within the Opportunity.

⚙ Basic Permissions

- Opportunity Creation: The ability to block or allow Opportunity Managers to create new Opportunities.

- Visibility Over Historic Data: The ability to block or allow Opportunity Managers to copy data from previous Opportunities, without giving them administrative access to the Organization Level.

➌ Role Manager

◈ What is a Role Manager?

A Role Manager is the third level of administration, falling below the Opportunity Manager level. Role Managers are similar to Opportunity Managers, however, they can only see and manage specific jobs within the Opportunity. They have management and scheduling capabilities over a subset of the Users that are assigned to the same Role they are managing.

◈ What is the purpose of a Role Manager?

The Role Manager permission allows the Opportunity Manager to share some of the managerial tasks within an Opportunity without having to grant full control to another User.

⚙ Basic Permissions:

- Visibility of Opportunity Staff: Administrators can control which Staff in the Opportunity a Role Manager can have access to through the following permissions:
    - The Role Manager can only view Staff they are managing
    - The Role Manager can view and schedule Staff who are not assigned any Roles
    - The Role Manager can view and schedule all Staff in the Opportunity

❹ Shift Supervisor and Check-in Administrators

The fourth level of administration falls below the Role Manager level, and includes the use of two System Roles: Shift Supervisors and Check-in Administrators. These Roles are intended for team leaders that need visibility over the Shift/Schedule level, without the ability to edit or manipulate the data.

◈ What is a Shift Supervisor?

A Shift Supervisor oversees the Users scheduled in a Shift, but are limited by the actions they can take.

Detailed information surrounding Shift Supervisors and their permissions can be found in the System Roles section below.

◈ What is a Check-in Administrator?

A Check-in Administrator has visibility over the entire Staff list with the sole purpose of tracking attendance.

Detailed information surrounding Check-in Administrators, their permission and how to successfully use them in an Opportunity can be found in the sections below.

❺ Staff / Volunteers

Staff / Volunteers are at the bottom level of the Administration hierarchy. These are the Users that sign up to the Opportunity, or are placed in the Opportunity by an Administrator to fill Scheduling positions and Roles.

❻ User Account Level

The User Account Level is not associated with an Organization's administrative hierarchy, it is associated with Bloomerang Volunteer. Once a User has claimed their Bloomerang Volunteer account by setting their password, they will be the owners of certain data that is visible across all Organizations created in Bloomerang Volunteer. This data is also known as 'Template Questions'. Users can be part of multiple Organizations, Opportunities and Shifts and maintain different permissions within each Organization.

Options for Architecting

There are multiple ways to set up an Organization's structural hierarchy. It is important to give thought into determining the best course of action as to which permissions to leverage and which permissions to leave alone. This involves understanding the current structure of the Organization and understanding how it can fit into Bloomerang Volunteer.

Depending on the size and complexity of the Opportunity there are best practices that will allow the Organization hierarchies to run smoothly. Leveraging permissions that are not required can often cause confusion within the Organization, whereas underutilizing permissions can put a lot of stress and pressure on the primary Administrators.

- **Using a Complex Administrative Structure**

  When operating a large User base *(Example, a base that has thousands of Users)* at the Organization Level, or, when operating a large schedule that requires a lot of attention within an Opportunity, it is recommended to use all levels of permissions.

  When multiple Opportunities are being run at the Organization Level, Organization Managers will want to appoint Opportunity Managers to offload some of the planning phases.

  When there is a complex schedule, the Opportunity Manager will want to appoint Role Managers to help build and manage the schedule to fit the needs of the Opportunity. During the Opportunity or onsite, the Manager will want to schedule Shift Supervisors and Check-in Administrators to ensure that all Users are being tracked and accounted for.

✔ **Pros of using a Complex Structure**

By utilizing all permission levels the workload can be shared and not rest on a small group of Users to maintain.

✘ **Cons of using a Complex Structure**

If there are too many Managers making changes within the system mistakes can happen. Without proper communication between Managers changes to User data, Roles, Shifts, etc can be a detriment to the success of the overall operation.

◈ Using a Simple Administrative Structure

In the case of running a smaller Opportunity that has a less complicated schedule, there may not be a need to use all permission levels. In these cases, the Opportunity Manager is able to build and maintain the schedule and typically does not require Role Managers to be assigned. Depending on how attendance and hours worked are being tracked, using either the Shift Supervisor or Check-in Administrator Roles can ensure that all Users are being accounted for.

✔ **Pros of using a Simple Structure**

Ensures that the Opportunity Manager is fully aware of all aspects of the Opportunity. Removes the possibility of accidental changes to the schedule.

✘ **Cons of using a Simple Structure**

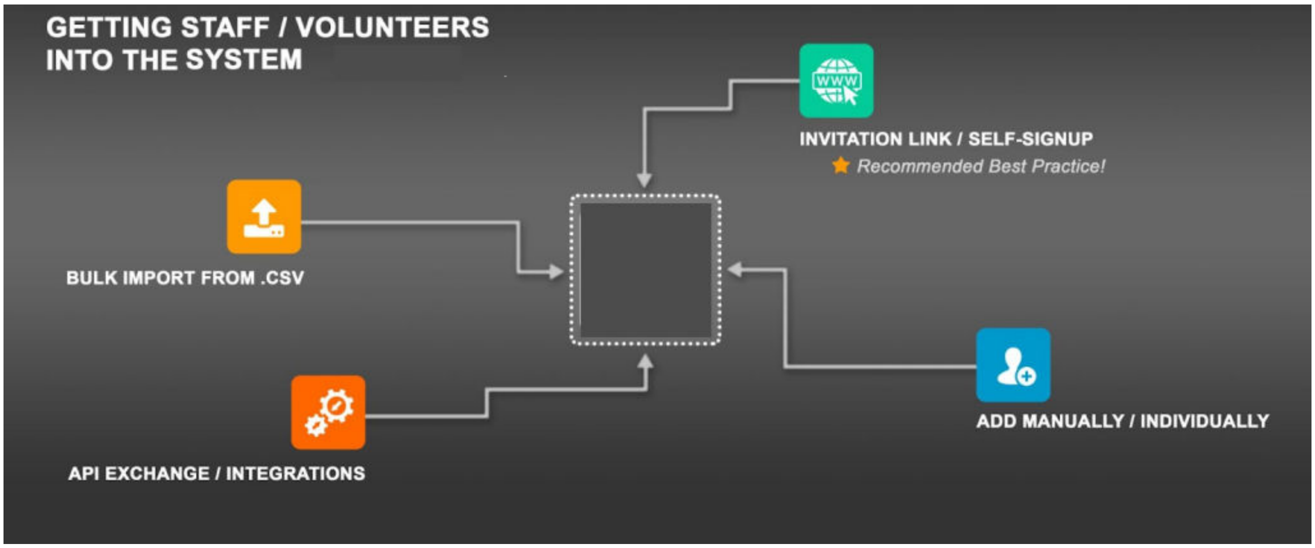
Without the assistance of Role Managers the Opportunity Manager may become overwhelmed and not be able to keep up with staff/volunteer requests as well as maintaining the schedule, etc.

Chapter 2

Migration Plan: Getting an Existing Database into Bloomerang Volunteer

Migrating Existing Users into Bloomerang Volunteer

Bloomerang Volunteer provides multiple ways an existing database of Users can be transferred into the system.



Migration Options

Whether an existing User base is being brought into the system (migrating) or new Users are looking to find opportunities (recruitment), Bloomerang Volunteer understands the importance of implementing a smooth and seamless transition for everyone involved. Multiple migration options are available and can be used simultaneously including: the option to send an invitation link, bulk import from a CSV file, add manually, or through an API integration.

❶ Invitation Link / Self Signup:

- **What is the Invitation Link?**

The Invitation Link is a unique URL that is generated automatically upon Organization or Opportunity creation. Using the invitation link to migrate your existing database of Users is a recommended best practice because it ensures that all the data collected is the most current and accurate. The invitation link is easily shareable across social media, embedded on a website or even emailed directly to your existing base.

- **What does the Signup Workflow look like for Staff/Volunteers?**

Once the unique registration link (URL) is generated, it can be distributed to Staff/Volunteers. This link will direct all Users to the Public Page for the Organization or Opportunity. From there, Users will have the option to signup or register and will also be prompted to login (*if they have an existing Bloomerang Volunteer account)* or create an account *(if they are a new User)*. Once account information is collected, Users will be led through the customized registration process that has been set up.

⚙ Basic Settings

- Automatically Generated URL: each organization and Opportunity has its own unique URL that is automatically generated upon creation.
- Public Page: The URL directs Users directly to the Public Page for the Organization or Opportunity.

✪ Best Practices

The Invitation link is the recommended best way to migrate Users into the Organization or Opportunity as it ensures that the data collected is up to date, correct and fresh.

✔ Pros of using the Invitation Link

- It is easily shareable.
- It can be embedded on your Organization or Opportunity's external website.
- It can be helpful for recruitment purposes, and when shared across social media it can attract more staff/volunteers into the system.

✘ Cons of using the Invitation Link

- Staff/volunteers may not want to re-enter all of their information that is required from the Organization / Opportunity.

♦ Tips and Tricks

- Branding the Public Page with a custom cover photo and logo will ensure that the Users coming in to register know exactly what they are signing up for.
- If the link's URL is too long, you can use external tools such as TinyURL to shorten it.

❷ Bulk Import from .CSV

◈ What is the Bulk Import option?

Bulk import is the second most used method of bringing existing Staff/Volunteers into Bloomerang Volunteer. With the bulk import feature, Administrators and Managers are able to import any custom attribute that may have already been collected from previous tools/systems.

◈ How does Bulk Import work for Admins?

Bulk importing information brings any pre-existing Staff/Volunteer data into Bloomerang Volunteer. Bloomerang Volunteer provides a downloadable.CSV template that allows for easy entry of Users' data. Once the data is populated in the CSV, it can be uploaded through the bulk import tool.

⚙ Basic Settings

- Import Limit: The bulk import function has a limit of 250 Users per import. If the existing staff/volunteer base is larger than that it will have to be broken up into separate imports.
- Import Custom Fields: Import all of the data associated with the Users.

✔ Pros of using the Import Feature

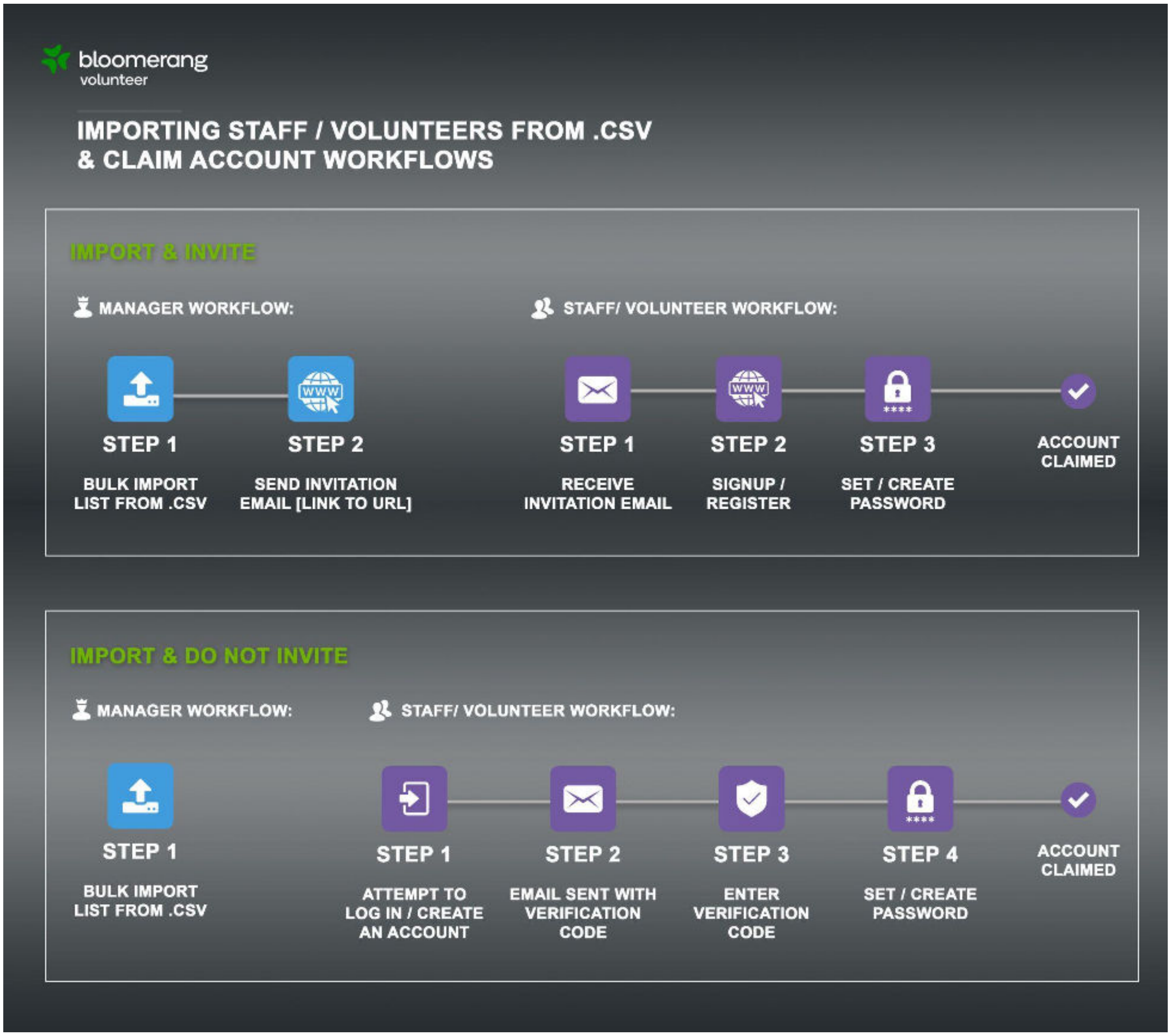
- It is the fastest way to get an entire database of existing Users into a new system.
- All existing profile data can be migrated into the system.
- Users don't have to re-enter their profile information.

✘ Cons of Using the Import Feature

- By importing an existing list of Users, there is always a chance that old/stale/outdated User-data will be brought into the new system. Fresh is always best!

◈ What does the Signup Workflow look like for Staff/Volunteers?

Once the Bulk Import is complete, it will be important to send out an invitation link to the Users helping them join the Organization and/or Opportunity. This will prompt the User to claim their Bloomerang Volunteer account and set their passwords in a seamless workflow directly from their email inbox.



✪ Best Practices

Once Users are imported into the system, it will be important to invite them to the Opportunity/Organization so that they are immediately directed to the correct page.

♦ Tips and Tricks

- Create custom questions to easily import any existing data relating to the Organization/Opportunity/Program by entering the information in the corresponding column on the import template form.
- If you want to make bulk changes to existing data fields *(for example, answering a custom question across multiple people)*, export the data, make the edits in the CSV file and re-import it into Bloomerang Volunteer.

- The Bloomerang Volunteer team can perform your import for you, ask your designated customer success rep about our professional services!

③ Add Manually / Individually

What is Adding Users Manually / Individually?

At both the Organization and Opportunity Level, Administrators and Managers are able to manually add Users to the database *(also known as the Staff List)* one at a time. All that is required to manually add a User is their first name, last name, and an email address.

Why Add Users Manually?

There are many reasons why a Manager may need to add in Users manually, but primarily it is used during initial setup for getting key members of the Organization or Opportunity into the system. This allows the Manager to add and schedule staff/volunteers before inviting them to the Organization or Opportunity.

What does the Signup Workflow look like for Staff/Volunteers?

The Signup Workflow is very similar to that of the Bulk Import in the section above. Once the User is added to the system, it will be important to send out an invitation link to help them join the Organization and/or Opportunity. This will prompt the User to claim their Bloomerang Volunteer account and set their passwords in a seamless workflow directly from their email inbox.

Please reference the workflow from the Bulk Import from CSV.

Basic Settings / Actions

- Required Information: The Manager is required to enter: First Name, Last Name, Email Address.
- Confirm Consent: The Manager must confirm the information is correct and confirm all Users have given their consent to import their personal data.

Best Practices

- Make sure you have consent from the User to create an account on their behalf.
- Ensure that the email address entered is correct and does not contain any typos, as it is the main point of contact with the Users.

✔ Pros of Manually Adding Users

- Quickly add Users to the database on the fly.
- Managers can add in specific Users that need to be in the system to start scheduling without having the Signup Workflow complete.

✘ Cons of Manually Adding Users

- If there are multiple Users that need to be added to the system, manually adding each User individually can be time consuming. A Bulk Import will speed things up.
- If the email address is input incorrectly the User will not receive communications sent, including the Invitation or direct messages.

⧫ Tips and Tricks

- If the email address already exists in the system, or is already claimed by the User, their basic information will already be pre-populated.
- Duplicate email addresses cannot be created in the system, therefore no duplicate records can exist.
- Instead of waiting for certain Staff or Volunteers to register themselves to your Opportunity, manually add the Users you want to immediately assign.

❹ API Exchange / Integrations

What is an API Exchange / Integration?

Bloomerang Volunteer offers a Public API that can integrate with existing systems and platforms to make managing Opportunities easier. To inquire about using the public API please contact supportvms@bloomerang.com.

How does the API work?

The Public API will allow for calls to be made to Bloomerang Volunteer to sync to another system or platform. Synced information includes Users, basic profile information, scheduled shifts, venues and locations, hours worked, and more! This can be extremely beneficial for large Opportunities that have constantly updating schedules and Users.

Basic Settings / Actions

- Tokens: When approved to use the API the Opportunity Manager will be provided with a token to be able to use the API to access Bloomerang Volunteer.

Best Practices

- If using the API to sync schedules and shifts make sure that editing the shifts within Bloomerang Volunteer will not affect the API call being used to sync.

✔ Pros of using an API Integration

- Reduce data duplication across platforms and always have the most up-to-date information.

- Integrations will save time in creating Shifts, Venues, Locations, Roles and more.

✘ Cons of using an API Integration

- Editing synced data can affect the API calls being used to sync data.

Chapter 3

User Data: Collecting and Leveraging Key Data on Users

Collecting Key Data on Users

There are various ways to collect key data on Users in the system, including: Custom Questions, Qualifications, Roles, Internal Notes and Star Ratings. Each of these methods can be utilized by Managers and Administrators in different ways and at various levels of the system.

➊ Leveraging Custom Questions

◈ What are 'Custom Questions' and How are they Stored?

A Custom Question is the ability to pose a specific question and customizing the way a User can respond to it. Asking the right questions during the registration process is essential to running a successful Program or Opportunity. Form Questions can be stored at both the Organization and Opportunity Levels. Questions stored at the Organization Level can be brought down to the Opportunity Level and re-used across Opportunities. Questions stored at the Opportunity Level are only available within each Opportunity.

⧫ Tips and Tricks

- Automatic Filters are created on the Staff Lists each time a new Custom Question is created.
- Multiple Answer Types are available when creating the question to collect the data you need.
- Multiple Sub-Questions can be created within a single Question and can be revealed based on how a User answers a question.

◈ What are Question 'Answers' and How are they Stored?

Question Answers are stored against a User's profile at both the Organization Level and Opportunity Level once they have completed or filled in a question on the Form. When a User completes an Organization Level Question, and that Organization Question is also used in another Opportunity, their answer will automatically be pre-populated so they never have to fill it out twice. Answers can always be edited or adjusted by Users if permissions are set to allow changes.

⧫ Tips and Tricks

- The automatically generated filters will help quickly narrow down the Staff Lists based on how Users have answered the question. *For example, if a multiple choice question of 'A', 'B', and 'C' was asked, the list can be quickly narrowed down to only show everyone who answered 'C'.*

◈ What are Answer Types?

An Answer Type determines how the data is being collected and is based on the type of question being asked.

Answer Types include:

- Single Line Text
- Paragraph Text
- Checkboxes *(Multiple Responses)*
- Dropdown *(Single Response)*
- Buttons *(Single Response)*
- Yes / No Buttons *(Single Response)*
- Date *(dd/mm/yyyy)*
- Address
- File Upload *(User can upload a file from their computer)*
- Phone Number
- Waiver *(Users must agree to the waiver)*

⚙ Basic Custom Question Settings

- Required: When a question is required, it will force the User to fill out the appropriate information in order to advance to the next step. If a User does not fill out the question, they will not be allowed to continue down the registration path.

  ♦ Tip:

  - It will be important to use this feature if key information must be collected.

- Enabled Questions: These questions will always display on the Form in the Signup Workflow. If enabled, Users will always be able to view their answers through their Organization and/or Opportunity Overview.

- Disabled Questions: If Questions are not enabled in the Opportunity, they will be hidden in the Signup Workflow, and the associated answers will not be visible to the Users.

  ♦ Tips and Tricks:

  - Responses to these hidden questions can be manually input by a Manager or Administrator and can be used as an additional way to collect information, tag, filter, and narrow down the staff list.

- Track Tasks on a User's Profile by using a Disabled Custom Question that has 'Checkboxes' as the Answer Type.
- If answers need to be updated in bulk, export the staff list via CSV, make changes to the appropriate fields, and then re-import those changes.

✪ Best Practices

- Rostering: When creating a custom question, advanced filtering options are automatically generated on the staff list. This allows the staff list to be narrowed down based on the answers to the questions *(this is a unique patented technology!)*. It will be important to leverage this feature if rostering decisions are based on how Staff answers certain questions.
- Avoid Data Duplication: Custom Questions and their Answers can be transferred down from the Organization Level to the Opportunity Level. When using Organization Questions at the Opportunity Level, staff will not have to repopulate their answers if they have previously filled them in. This also saves time for the managers, because they don't have to recreate the same question.

✔ Pros of using Custom Questions

- The Organization that creates the Custom Question will be the primary owner of the data that is collected in the responses.
- Administrators can answer Questions on behalf of the Users.
- Questions can be asked in a variety of ways.
- There is no limit to the amount of questions that can be created.
- Questions can be updated, edited or changed at any time.

✘ Cons of using Custom Questions

- Custom Questions and their associated answers cannot span across Organizations and can only be associated with the one Organization that they are created in.

❷ Leveraging Template Questions

◈ What are Template Questions?

A Template Question is a preconfigured question created by Bloomerang Volunteer.

Template Questions include the following:

- Group Registration Questions
- Bio
- Date of Birth
- Gender
- T-Shirt Size
- Mobile Phone Number
- Address
- Emergency Contact
- Opportunity Waiver
- Organization Waiver

◈ How are Template Question Answers Stored?

Template Question Answers are stored against the User's Bloomerang Volunteer Account, not against their Organization Profile or Opportunity Profile. This means that the User owns their answers, not the Organization.

✔ Pros of using Template Questions

- Streamlines the form creation process.
- Consistent data collection system wide.
- Template Question data is transferred across all Organizations.

✘ Cons of using Template Questions

- The Opportunity or the Organization will not be the owner of the answers, and cannot fill in the answers on behalf of the User once their accounts have been claimed.

⧫ Tips and Tricks:

- If the Opportunity or Organization wants to be the primary owner of the answers, create an identical custom question that mimics the template question.

- If the Template Question does not provide robust-enough Answer Options, create a Custom Question that includes those missing Answer Options.

❸ Leveraging Custom Roles within an Opportunity

◈ What are 'Custom Roles'?

Roles are customizable input fields that can be assigned to a User or selected by a User. Roles are only used and stored at the Opportunity level, and do not transfer up to the Organization Level.

♦ **Tip:**

- If you want to use Roles across Opportunities, you can always copy the Opportunity and decide to include the roles, or, within the context of the Opportunity you can copy Roles from a previous Opportunity.

◈ How to Define a Custom Role?

Traditionally, Roles are defined as the tasks, jobs or positions that are used to tag and categorize Users within the Opportunity. Roles however, are also very flexible and have been used to define the following:

- Departments, Districts or Sectors
- Territories, Areas or Locations
- Groups, Ranks or Status
- A simple timeblock not associated to the Schedule
- ...and more!

◈ Linking Custom Roles

Roles can be linked with certain attributes. Once a Role is linked with the attribute, the Role and the attribute will act as an independent unit.

Linked attributes include the following:

- <u>Shifts:</u> Roles can be applied to Shifts within the Schedule. Once a Role has been linked with a Shift, they are known as a "Scheduled Role". Each Scheduled Role within a Shift will act independently from one another.
- <u>Qualifications:</u> Roles can be linked to Qualifications. If a User is granted a Role that has Qualifications linked to it, the User will also gain those

associated Qualifications *(If a User is granted a Qualification that has Roles linked to it, the User will not automatically gain those associated Roles).*

◈ Assigning Custom Roles to Users

Custom Roles can be appointed to Users in bulk or independently as a manual action by an Administrator. Because this action is so popular and heavily contextual, there are multiple ways within the Opportunity Level to assign a User to a Role.

⧫ Tips and Tricks:

- Filter the Staff List down and manually assign Roles to Users based on Form Question responses and Qualifications.

◈ Using Custom Roles in the Signup Workflow

Roles can be made available for self-selection in the registration process.

◈ How do Custom Roles work in the Signup Workflow?

Role selection is an independent step in the registration process, and is always presented before the Shift selection step. If both the Role Step and the Shift Step are enabled, the selected Roles will automatically narrow down the list of Shift opportunities presented to the User. *For example, if a Bartender Role is selected in the Role step, the User will only see opportunities in the Shift step that include the Bartender position.*

⚙ Basic Selection Settings

Administrators are able to set a Minimum or Maximum on the number of Roles a User can select during the registration process.

- Minimum Role Selection: The ability to set a minimum amount of Roles a User must select in the registration process. *For example, if the minimum is set to 3, the User will be blocked from advancing down the registration process until 3 Roles are selected.*

- Maximum Role Selection: The ability to set a maximum amount of Roles that a User can select in the registration process. *For example, if the maximum is set to 1 and the User selects a single Role, all other Role options will be disabled for selection.*

⚙ Basic Signup Visibility Settings

Administrators are able to set Roles as Public or Private which determines whether the Role is visible to select during the registration process.

- Public Roles: If a Role is set to Public, it will be visible to Qualified Staff during the Signup Workflow and can be selected.
- Private Roles: If a Role is set to Private, it will not be visible in the Signup Workflow, but can still be viewed by Staff if they have been assigned to them. It will be important to use private Roles if you want to manually assign staff, without giving them the option to opt-out.

♦ **Tips and Tricks:**

- Use the Minimum Role selection feature to collect people's areas of interest.
- By properly using Public/Private Roles, Administrators are able to control which Users sign up for important tasks within an Opportunity.

4 Leveraging System Roles within an Opportunity

What are 'System Roles'?

System Roles are special Roles created by Bloomerang Volunteer that enable different levels of permissions within an Opportunity/Schedule/Program, and are optional to use. These Roles can only be manually assigned to a User by an Administrator, which means they are not visible in the Signup Workflow. When a User is granted a System Role, they will only be granted that level of permission within the Opportunity; the permission will not transfer up to the Organization Level, or across Opportunities.

The System Roles within an Opportunity include:

- Opportunity Manager
- Role Manager
- Shift Supervisor
- Check-In Administrador

The only System Role that is required in an Opportunity is the Opportunity Manager. All other System Roles are optional and can be used in different combinations to help run and manage the Opportunity.

How do System Roles Work / Levels of Permissions?

Bloomerang Volunteer provides several levels of permissions within an Opportunity that allow Administrators to either share the workload or restrict what Users are able to do.

1. Opportunity Managers

Opportunity Managers are the primary Administrators of the Opportunity and can access and action on all data within the Opportunity.

⚙ Basic Settings

- Primary Opportunity Manager: Each Opportunity within Bloomerang Volunteer is required to have a Primary Opportunity Manager. This will by default be the Administrator that creates the Opportunity, however it can always be changed.

- Edit Additional Details: Include additional instructions in the Opportunity Manager Description.

2. Role Manager

Role Managers are appointed by the Opportunity Manager when required. A Role Manager is a type of Administrator that has a similar view to the Opportunity Manager, however it is limited to only allow management over Users that are assigned to the matching Role. A single User can be a Role Manager of one or multiple Roles.

⚙ By default, Role Managers are able to:

- View and edit the Staff in their Roles
- View and Schedule Staff in their Roles, and create Shifts for the Roles
- View and edit the Roles' descriptions
- View, create, use, but not delete Qualifications
- Add new Roles to an Opportunity

⚙ By default, Role Managers are not able to:

- View all Staff in the Opportunity
- View the Master Schedule
- View Opportunity-related Settings
- Create Venues and Locations
- Create Groups

⚙ Basic Role Manager Permissions:

- Visibility of Opportunity Staff: Adminators can control which Staff in the Opportunity a Role Manager can have access to through the following permissions:
    - The Role Manager can only view Staff they are managing
    - The Role Manager can view Staff who are not assigned any Roles
    - The Role Manager can view all Staff in the Opportunity
- Notes and Star Ratings: Administrators can control the visibility and history of User's notes and star ratings through the following permissions:
    - Allow Role Managers to add Internal Notes and Star Ratings on Staff
    - Allow Role Managers to view Internal Notes and Star Ratings written by others

3. Shift Supervisor

The Shift Supervisor Role is designed for the "Head Staff/Volunteers" who can be trusted to have additional capabilities, without being able to manipulate the Schedule. This Role comes into play once an Opportunity has gone Live, and has permissions solely on the mobile app. In order for Shift Supervisors to have access to the permissions, they must be scheduled in every Shift that they are responsible for overseeing.

⚙ **By default, Shift Supervisors are able to:**

- Check-in or Check-out (or Clock-in/Clock-out) Users in their Shifts
- Send Broadcasts
- Access Users contact information

⚙ **By default, Shift Supervisors are not able to:**

- View all Staff in the Opportunity
- View the Master Schedule
- Create or manipulate any Opportunity data

⚙ **Basic Shift Supervisor Permissions:**

- <u>Notes and Star Ratings</u>: Administrators can control the visibility and history of User's notes and star ratings through the following permissions:
    - Allow Supervisors to add Internal Notes and Star Ratings on Staff
    - Allow Supervisors to view Internal Notes and Star Ratings written by others

4. Check-in Administrator

The Check-in Administrator Role is designed to improve attendance tracking. The Role becomes active once the Opportunity has gone Live, and only has permissions on the mobile app. The Check-in Administrator has the ability to check Users in and out of the Opportunity *(or clock Users in and out of their Shifts)*, and has access to the full Staff List. This Role comes into play for Opportunities where Users are not granted the permission to check themselves in and out. However, this Role can still be used in any scenario, even if Users are allowed to check themselves in and out.

⚙ **By default, Check-in Administrators are able to:**

- View all Staff in the Opportunity
- Check-in or Check-out *(or Clock-in/Clock-out)* Users in their Shifts
- Access to Users contact information
- Visibility over Users' personal schedules
- Visibility over User's profile information including Roles, Qualifications and Form Question Answers

⚙ **By default, Check-in Administrators are <u>not</u> able to:**

- View or Edit the Master Schedule
- Send Broadcasts
- Create or manipulate any Opportunity data

⚙ **Basic Check-in Administrator Permissions:**

- Notes and Star Ratings: Administrators can control the visibility and history of User's notes and star ratings through the following permissions:
    - Allow Check-In Administrators to add Internal Notes and Star Ratings on Staff
    - Allow Check-In Administrators to view Internal Notes and Star Ratings written by others

✪ Best Practices when using System Roles

- Only assign System Roles that will be used during the Opportunity.
- Depending on the complexity of the Opportunity, System Roles might not need to be leveraged. If the Opportunity is large and has many Users in it, System Roles should definitely be leveraged. *For example: Role Managers can be beneficial in building larger Schedules and can be left in charge of a group of Users without being able to affect general settings.*

✔ Pros of using System Roles

- Proper use of System Roles can help reduce the amount of work that the Opportunity Manager has to do.

✘ Cons of using System Roles

- Certain System Roles, such as Role Managers, can make many changes within the Schedule and Staff list. This can sometimes lead to mistakes being made that will affect the workload of the Opportunity Manager.

♦Tips and Tricks

- System Roles can always be assigned at the last minute, for example if Role Managers are needed but in the lead up the Opportunity Manager does not want them editing anything, they can be assigned the Roles when the Opportunity goes Live.

❺ Leveraging Qualifications

◈ What are 'Qualifications' and where are they stored?

Qualifications are customizable input fields that can be assigned to a User or selected by a User. Qualifications can be created and stored at both the Organization and Opportunity Levels. Qualifications stored at the Organization Level can be brought down to the Opportunity Level and re-used across Opportunities. Qualifications stored at the Opportunity Level are only available within each Opportunity.

◈ How to Define a Qualification?

Traditionally, Qualifications are used to assign abilities, skill sets, or certifications and are used to tag and categorize Users. Qualifications however, are also very flexible and have been used to define the following:

- Workflow Status or Achievements,
- Completed Tasks, Activities or Assignments
- Territories, Areas or Locations
- Groups, Ranks or Status
- Position, Talent or Traits,
- ...and more!

◈ Linking Qualifications

Qualifications can be linked to Roles. If a User is granted a Qualification that has a Role linked to it, the User will not automatically gain those associated Roles *(If a User is granted a Role that has Qualifications linked to it, the User will also gain those associated Qualifications).*

◈ Assigning Qualifications to Users

Qualifications can be appointed to Users in bulk or independently as a manual action by an Administrator. Because this action is so popular and heavily contextual, there are multiple ways within the Opportunity Level to assign a User to a Qualification.

♦ Tips and Tricks:

- Filter the Staff List down and manually assign Qualification to Users based on Form Question responses and Roles.

◈ Using Qualifications in the Signup Workflow

Qualifications can be made available for self-selection in the Signup Workflow.

◈ How do Qualifications work in the Signup Workflow?

Qualification selection is an independent step in the Signup Workflow, and is always presented before the Role selection step. If both the Qualification Step and the Role Step are enabled, the selected Qualifications will automatically narrow down the list of Roles presented to the User. *For example, if a Smart-Serve Certification Qualification is selected, the User will be presented with the linked Roles, such as the Bartender Role.*

⚙ Basic Signup Visibility Settings

Qualifications have three different visibility settings: Public, Private and Hidden.

Public Qualifications: Visible to Users as selectable options during the Signup Workflow.

- Private Qualifications: Not visible in the Signup Workflow, but can still be viewed by the Users when they are assigned to it. Administrators must manually assign Users to Private Qualifications.

- Hidden Qualifications: Never be visible to a User, even when they are assigned to it. Administrators must manually assign Users to Hidden Qualifications.

✪ Best Practices

- Use Private Qualifications if Users need to be manually assigned to the Qualification by an Administrator.

- Use Hidden Qualifications if Users need to be tagged with sensitive information.

- Use Hidden Qualifications if Users do not have the option to opt-out.

♦ Tips and Tricks:

- Collect Documentation: If documentation for a Qualification needs to be collected *(for example, a Certification)*, create a custom question on the Registration Form that requires a User to upload the document. Once the document is reviewed, manually tag that User with the appropriate Qualification.

- Avoid Duplicate Data: Qualifications can be transferred down from the Organization Level. If an Opportunity is using Organization Qualifications, it means that Users do not have to input their Qualifications twice *(the system will remember)*, and Administrators don't have to create the same Qualifications.

◈ Using Qualifications to Show or Hide Signup Opportunities

Organization Qualifications can be used to narrow down the Signup Opportunities that are visible to Users. This will be important if certain opportunities need to be hidden from a subset of people.

For example, if Users are tagged with a Hidden PTSD Qualification, hide all of the loud Firework Events from showing up as an available Signup Opportunity.

Custom Logic Queries can be built to Customize the visibility of Opportunity Listings including the following options:

- Hide Opportunity from Users who have ANY of these Qualifications
- Show Opportunity to Users who have ANY of these Qualifications
- Show Opportunity to Users who have ALL of these Qualifications

---

◈ Leveraging Hidden Qualifications

Administrators can use Hidden Qualifications for any attribute that needs to be withheld from the User. Hidden Qualifications are recommended when sensitive information is being collected, but can also be used to collect positive and negative skills or attributes.

The following are creative ways Hidden Qualifications have been used by Bloomerang Volunteer customers:

- Tagging People with Attributes: For Example, if Users are associated with a certain person, group or company, assign them a Hidden Qualification.
- Task Management: For Example, if you need a User to complete a certain set or series of internal tasks, assign them those Hidden Qualifications.
- Signup Workflow - Step Completion: For Example, have visibility over where your Users are in the registration workflow, and assign/remove Hidden Qualifications as they advance down the workflow.
- Areas / Regions / Districts / Territories / Venues / Locations**:** For Example, if certain Users in a specific area need to see Signup Opportunities from their area, tag them with a region-based Hidden Qualification.
- Black Listing: For Example, create a Qualification called Blacklist and hide those Users from seeing all Signup Opportunities.

- Discreetly Facilitate Role and Shift Assignments: For Example, if you need to assign Users based on sensitive information such as physical looks *(ie. a seat filler at the Gala Event needs to have the physical attributes of model)*, or capabilities *(ie. needs someone strong to lift 200+ lbs)*, assign them a Hidden Qualification and link it to the appropriate Role.

❻ Leveraging Internal Notes

◈ What are 'Internal Notes' and where are they stored?

Internal Notes are customizable input fields associated with a User. These Notes can only be created by an Administrator and are never visible to the User they are assigned to. The way Internal Notes are stored is unique from how other data is stored. When an Internal Note is created on a User Profile at the Opportunity Level, it is transferred up to the Organization Level. When an Internal Note is created at the Organization Level, it stays at the Organization Level and cannot be seen at the Opportunity Level.

◈ How to use Internal Notes / Benefits?

Using Internal Notes allows Administrators to understand the quality of the Users based on past performances. When this feature is properly leveraged, Users with poor comments could be removed or not included in future Opportunities/ Programs/ Schedules, improving the overall success.

◈ Creating Internal Notes

Traditionally, Internal Notes are used to track the performance history of a User.

Internal Notes however, are also very flexible and have been used to track the following:

- Key Metrics or Totals *(For example, number of attendees registered, how many hours they worked that day, etc)*
- Equipment or Merch that was collected *(For example, the User collected their parking pass, t-shirt, welcome package, etc)*
- Tasks Completed
- … And more!

⚙ Basic Settings and Permissions

Opportunity Managers and Organization Managers can control which Administrators can view, edit, or create Internal Notes on both the Web and Mobile App. This includes: Role

Managers, Supervisors, and Check-in Administrators. Internal Notes can be applied to Star Ratings, however they are not directly linked and can be used independently from one another.

✔ **Pros of using Internal Notes:**

- Internal Notes can be tracked across Opportunities and will automatically be transferred up from the Opportunity Level to the Organization Level.

✘ **Cons of using Internal Notes:**

- There are no associated filter options for Internal Notes.
- Internal Notes cannot be viewed across Users in one master view; the data can only be accessed on an individual basis through the User's profile.

  ♦ **Tip:**

  - Bloomerang Volunteer offers custom reports as a professional service add-on. If a report of internal notes across Users is needed, contact your Customer Success Representative for more information.

❼ Leveraging Star Ratings

◈ What are 'Star Ratings' and where are they stored?

Star Ratings are preconfigured data inputs associated with a User. A User can optionally be rated between 0 and 5 Stars. These Ratings can only be created by an Administrator and are never visible to the User they are assigned to. The way Star Ratings are stored is unique from how other data is stored. When a Star Rating is created on a User Profile at the Opportunity Level, it is transferred up to the Organization Level and the Average Rating is calculated across Opportunities. When a Star Rating is created at the Organization Level, it stays at the Organization Level and cannot be seen at the Opportunity Level.

◈ How to use Star Ratings / Benefits?

It is up to Administrators to determine what each Star Rating represents. Typically, a Star Rating represents an overall grade on the performance of the User *(for Example, one star implies a poor performer, and five stars implies an outstanding performer)*. Assigning Star Ratings allows Administrators to filter and sort Users based on their overall performance. When this feature is properly leveraged, Users with poor ratings could be removed or not included in future Opportunities/ Programs/ Schedules, improving the overall success.

⚙ Basic Settings and Permissions

Opportunity Managers and Organization Managers can control which Administrators can view, edit, or create Star Ratings on both the Web and Mobile App. This includes: Role Managers, Supervisors, and Check-in Administrators. Star Ratings can be applied to Internal Notes, however they are not directly linked and can be used independently from one another.

✔ Pros of using Star Ratings:

- Star Ratings can be tracked across Opportunities and will automatically be transferred up from the Opportunity Level to the Organization Level.
- Average Star Ratings are automatically calculated at both the Opportunity Level and Organization Level making it easier to get a sense of overall performance.
- There are associated filter options for Star Ratings to help narrow down the list of Users.
- The Average Star Ratings can be viewed across Users in a master view; the data can be exported as a Custom Column at the Opportunity Level.

✘ Cons of using Star Ratings:

- If the Organization has not established the context of what each Star Rating represents, there could be some confusion and competing ideas amongst Administrators.

Copying Data

Save time and become more efficient through reusing or copying key data. There are various ways to make a copy in the system, including: Copying specific data from different Opportunities, copying an entire Opportunity and copying Shifts. Each of these methods can be utilized by Managers and Administrators in different ways and at various levels of the system.

➊ Copying Data from Another Opportunity

◈ What is Copying Data from another Opportunity?

This allows Administrators to copy specific information laterally across Opportunities. The following data can be copied:

- Copy Staff from Another Opportunity

- Copy Roles from Another Opportunity
- Copy Qualifications from Another Opportunity
- Copy Venues from Another Opportunity

⚙ **Basic Settings and Permissions**

- User can view historic data: This functionality is especially important for those Administrators assigned as Opportunity Managers that do not have access to the Organization level. This permission allows Opportunity Managers to copy very specific information, without granting them full access to an entire Opportunity.

✔ **Pros of Copying Data from another Opportunity:**

- Saves Administrators time by not having to recreate the same data.
- Keeps data accurate and consistent across Opportunities.

✘ **Cons of Copying Data from another Opportunity:**

- Administrators get a very limited view of data that is being copied, and some in depth details are limited from the interface.

  For example, when copying Staff, you do not have full access to the Staff profile, just their first and last name. Once the Staff are copied, their full profile information will be displayed inside the Opportunity.

⧫ **Tips and Tricks:**

- If a lot of data in the Opportunity is being copied from another Opportunity, it might be best and faster to copy the entire Opportunity and delete the unwanted information (instead of copying each set of data individually).

❷ Copying an Entire Opportunity

◈ What is Copying an entire Opportunity?

This allows Administrators to duplicate an entire Opportunity and all of its associated information, including the Schedule, saving an abundant amount of set up time.

⚙ **Basic Settings and Permissions**

- Changes made to the copy: Changes made to the new copy will not affect the original.

- Schedule Settings: When copying an Opportunity, Administrators can customize how they want the Schedule copied:
    - Include Staff and their Shift assignments:
    - Copy Schedule without Staff
- Data Settings: When copying an Opportunity, Administrators can customize what data they want to include in the copy:
    - Registration Form Questions
    - New Start Date: The pattern between the scheduled days will remain the same. Scheduled dates can always be changed once the copy is complete.

✔ **Pros of Copying an entire Opportunity:**

- Saves Administrators time by not having to recreate the same data.
- Keeps data accurate and consistent across Opportunities.

✘ **Cons of Copying an entire Opportunity:**

- Administrators can only copy one Opportunity at a time.
- The larger the Opportunity, the longer the copy might take *(for example, if the schedule is very complex with hundreds of shifts over months, the copy could take upwards of 5 minutes)*.

⧫ **Tips and Tricks:**

- When creating/copying a new Opportunity, the name must be unique so the two Opportunities don't get confused with each other. Bloomerang Volunteer will enforce this.
- When running many Opportunities that have a similar structure, it is faster to copy the entire Opportunity and remove the unwanted information from it (instead of spending time recreating the same structure).

③ Copying Shifts

What is Copying Shifts?

This allows Administrators to duplicate a single Shift, or an entire Schedule and all of its associated information, including the associated place, roles and people.

⚙ Basic Settings and Permissions

- Changes made to the copy: Changes made to the new copy will not affect the original.
- Dates: When copying Shifts, Administrators can customize when they want the Shifts copied to:
  - Single Date
  - Multiple dates
- Data Settings: When copying Shifts, Administrators can customize what data they want to include in the copy:
  - Roles
  - Scheduled Staff

✔ Pros of Copying Shifts:

- Administrators can copy multiple shifts at a time.
- Administrators can save time by not having to manually recreate the same data.
- Keeps data accurate and consistent across Shifts.

✘ Cons of Copying Shifts:

- Shifts are not linked, therefore when one gets updated, the others will not.
- When copying a large volume of Shifts, the copy might take longer *(for example, if the schedule is very complex with hundreds of shifts over months, the copy could take a couple of minutes)*.

♦ Tips and Tricks:

- When a Schedule is recurring weekly, copy the entire schedule to the following week.
- If the same style of Shift happens within the same day, copy it multiple times on that same day.

Translation of Data

Language and Localization

Bloomerang Volunteer is designed for an international audience. It is readily available in six different languages and has a built-in translation tool for in-house modifications.

- **What languages is Bloomerang Volunteer available in?**

  Languages include:

  - English
  - French
  - Spanish
  - German
  - Dutch
  - Italian

- **How do multiple languages work?**

  The preconfigured Bloomerang Volunteer text is currently translated to support the six languages. If Administrators want to be able to translate their custom input text, multiple languages can be manually added to an Opportunity or Organization to support those languages. The translation of text strings can be done in the system through the translation tool, or, through the import/export feature at both the Opportunity Level and Organization Level.

- **What is the Translation Tool?**

  The translation tool allows Administrators to manually update all custom input text right within the system. The tool provides an overview of how complete each language is through a percentage, along with visibility over problem areas, and editing capabilities.

- **How do you Translate Custom Text?**

  Administrators can apply and configure all custom attributes *(for example, Role Titles, Shift Descriptions, Custom Questions)* in Multiple Languages to an Opportunity or Organization. The purpose of this feature is for Staff and Volunteers to seamlessly sign up to an Opportunity or Organization in their native language, and only ever be presented one single language.

✪ **Best Practices**

- Organizations or companies that require multiple languages typically outsource the translation of the text strings. Sometimes, it is easier to export those files to send to the appropriate third-parties and re-import those files upon completion.

- Bloomerang Volunteer's internal translation tool is designed for speedy editing. It incorporates all of the standard keyboard shortcuts to jump to the next column or row (Tab, Command/Ctrl+Enter, etc).

⧫ **Tips and Tricks:**

- When Using the translation tool, use Filters to narrow down the data fields that require the most attention. For Example:
  - Hide any of the custom input fields
  - Only show empty fields
  - Only show unsaved changes
  - Only show duplicate fields
  - Only show fields that are missing required information
  - Only show fields that are exceeding the maximum length
  - Only show unpopulated primary Language fields

- Use the translation tool or export/import option as a quick way to make mass changes to custom attributes and their descriptions. This method will work even if the Organization or Opportunity is only using one language. *For example, if all Qualification details require the same sentence input into the bottoms of the description field, copy-paste that sentence across all Qualifications using the translation tool.*

Ownership of Data

In Bloomerang Volunteer, there are two types of personas that can own information and data: the User Account, and the Organization.

Claimed Accounts *(User's Account)*

◈ What is a Claimed Account?

An Account is "claimed' once a User has set their own password and logged into Bloomerang Volunteer for the first time. When a User claims their account, they have agreed to the Bloomerang Volunteer Terms and Conditions.

◈ What data do Claimed Account holders own?

Once an account is claimed, the Users take immediate ownership of key data. Template Questions populated at both the Organization Level and Opportunity Level are preconfigured questions created by Bloomerang Volunteer. These Template Question Answers are stored against the User's Bloomerang Volunteer Account, <u>not</u> against their Organization Profile or Opportunity Profile. This means that the User owns their answers, not the Organization. This information will remain consistent for the Staff/Volunteers across Opportunities and, across Organizations.

Template Questions include the following:

- First Name
- Last Name
- Email
- Bio
- Date of Birth
- Gender
- T-Shirt Size
- Mobile Phone Number
- Address
- Emergency Contact

Unclaimed Accounts *(Organization's Account)*

◈ What is an Unclaimed Account?

This is an account that was created on behalf of the Organization or Opportunity, typically done through a bulk import or manual creation. When an Organization creates an account, those Users have not set their password or logged into Bloomerang Volunteer.

◈ What data do Unclaimed Account holders own?

If an account is unclaimed, the organization responsible for creating the account owns full control over the data associated with the account. This means that the person representing the unclaimed account does not own the data.

The Organization is responsible for both the unclaimed account's Template Question Answers and Custom Question Answers.

◈ **What data do Organizations own once an account has been claimed?**

Once an account has been claimed, the Organization can no longer change or manipulate Template Question Answers. The Organization can however change and manipulate Custom Question Answers, because the organization is responsible for creating those questions.

♦ **Tips and Tricks:**

- If the Organization wants full control over the user's information, do not use the Template Questions provided.

GDPR: Data Privacy Guidelines

As of May 25 2018, all organizations working with the data of EU citizens will need to be GDPR (General Data Protection Regulation) compliant. Bloomerang Volunteer is here to help our customers in their efforts to comply with the GDPR.

What is GDPR?

The General Data Protection Regulation (GDPR) is a regulation by which the European Parliament, the Council of the European Union and the European Commission intend to strengthen and unify data protection for all individuals within the European Union. It applies if you offer products or services in Europe, process Personal Data from Europe or Monitor behavior of people in Europe. It also addresses the export of Personal Data outside the EU and gives control of that data to citizens and residents. It simplifies the regulatory environment for international business by unifying the regulation within the EU.

When are these regulations starting to be enforced?

All companies collecting and/or processing the personal data of EU individuals must be GDPR compliant by May 25, 2018.

Why can't I require certain Bloomerang Volunteer form questions?

According to article 5 of the GDPR, businesses are no longer permitted to require sensitive data or more personal information than necessary in relation to the purposes for which this information is processed ("data minimization"). While this means that some of Bloomerang Volunteer's pre-made form questions will no longer have the option to be required (i.e. Biography, Date of Birth, Gender, T-Shirt Size), Opportunity Managers can still create required custom questions in order to ask what is necessary in order to run their Opportunity.

To learn more about GDPR, please visit
https://bloomerang.co/blog/bloomerang-and-gdpr/

Chapter 4

Opportunities: Setting Up, Adding Users, and Managing Opportunities

Opportunity Setup

Key Questions to Ask

Key decisions surrounding the Opportunity need to be made ahead of building things out.

The following is a list of questions that should be considered:

- **Opportunity**
  - What kind of Opportunity are you creating?
  - What key components is the Opportunity leveraging?
- **Users**
  - How do you want Users to view and access the Opportunity?
  - When do you want Users to access the Opportunity?
  - Who do you want to hide the Opportunity from?
  - How do you plan on getting Users into the system / Opportunity?
  - Do you want to limit the number of Users?
  - What Permissions and System Roles do you want to Leverage?
- **Data**
  - What key data or information do you need to collect on your Users?
  - How do you want to collect Availability?
  - How are you using Groups?
- **Schedule**
  - Is there a Schedule?
  - How do you want the Schedule to be structured?
  - What functionality do you want to open or restrict?

- **Shift Assignments**
    - How do you want to place Users into a Shift?
        - Do you want Users to Self-Signup?
        - Do you want to manually Roster Users?
    - How do you want to notify Users of their assignments?
    - Do you want Users to confirm their assignments?
- **Attendance**
    - How do you want to track attendance?
    - Do you want to track hours?

For each of these questions, there are key settings within the Opportunity that can be toggled to achieve any desired outcome.

Adding Users to Opportunities

Similar to the Organization Level, there are many ways Users can be added or recruited into an Opportunity.

Invitation Link / Self-Signup

The Invitation Link is a unique URL that is generated automatically upon creation of the Opportunity. Every Opportunity within the Organization has a different link. Typically, the Invitation Link is used for when Administrators want their Users to self-signup. The Invitation Link is easily shareable across social media, embedded on a website or even emailed directly to your existing base.

> **Best Practices**
>
> The Event registration link is the recommended best practice for recruitment for larger single Events. If running multiple Events throughout the year, using the Org Staff List can be a quick and easy way to keep existing staff/volunteers engaged.

Add Manually / Create Individual Accounts

Administrators and Managers are able to manually add Users to the Staff List one at a time. All that is required to manually add a User is their first name, last name, and an email address.

Transfer Into an Opportunity from the Organization Level

Administrators can add Users into an Opportunity individually or in bulk through the Staff List at the Organization Level. This action can only be performed by Organization

Managers, and cannot be done by Opportunity Managers *(as they do not have administrative access to the Organization Level)*.

Pull from Another Opportunity

If Opportunity Managers do not have administrative access to the Organization Level, they can be granted special permissions to access key data from other Opportunities. This allows Opportunity Managers to copy Users laterally across Opportunities.

Duplicate Opportunity and Include Staff

At the Organizational Level, Opportunities can be copied entirely. When an Opportunity gets copied, options are presented to the Administrator asking how they want the information copied: with or without the Schedule, Roles and the Staff. This can be extremely useful if Opportunities are repeating and require the same Schedule and Staff.

Bulk Import from .CSV

Bulk import is a method of bringing existing Users into Bloomerang Volunteer. With the bulk import feature, Administrators and Managers are able to import any custom attribute that may have already been collected from previous tools/systems. Bloomerang Volunteer provides a downloadable.CSV template that allows for easy entry of Users' data. Once the data is populated in the CSV, it can be uploaded through the bulk import tool.

✪ Best Practices

**Please Note*: Each .CSV template is unique to the Opportunity, so it is important to copy the data directly into the downloaded file.

⧫Tips and Tricks

This feature can also be used to make bulk changes to Answer Options, or add additional information missing from User Profiles. Simply add a new question to the Custom Form, export the Staff List, and populate the new data column presented on the Template.

Tips for Managing Many Opportunities

If the Organization Level consists of many Opportunities, it can get overwhelming. The following is a list of tips and tricks that can help improve workflows and speed.

Copy Previous Opportunities

Save on creation time by simply replicating previous Opportunities.

Bulk Actions

Use Bulk Actions at the Organization Level to change key settings across Opportunities. *For example, change Signup Visibility, Start dates, Schedule settings and more!*

Filters

Narrow down the list of Opportunities by filtering on key information. *For example, filter down the list of opportunities by the Check-in style, Start Date, or Signup state.*

Opportunity Overview

This preview provides a shortcut to all of the individual Opportunity's settings. It is designed so that the Organization Managers do not have to leave the Organization Level by dropping into the administrative interface of the Opportunity Level.

Visibility of Opportunities

Showcasing Signup Opportunities is key to recruiting a solid base of Staff and Volunteers. Within Bloomerang Volunteer, the visibility of Signup Opportunities can be customized to suit the needs of any Organization. The following settings can be configured and applied to any Opportunity Listing:

Hidden

Nobody can see the Signup Opportunity. This setting is useful during the building process, when the Opportunity is not ready to be seen, or, for when the Opportunity is exclusive and is invitation-only.

All Members

All members of the Organization can see the Signup Opportunity. This setting is useful for when many positions need to be filled and there are not as many restrictions on who can sign up.

Custom

Customize the visibility of this Opportunity Listing. Apply special logic queries to decide which Users can and can't see the Listing based on their assigned Qualifications. This setting is useful if certain Opportunities need to be hidden from a subset of people

Public

The general public can see the Signup Opportunity listed on the Organization Page. This setting is useful for Organizations looking to showcase their Opportunities for marketing and recruitment purposes.

Embed Opportunities

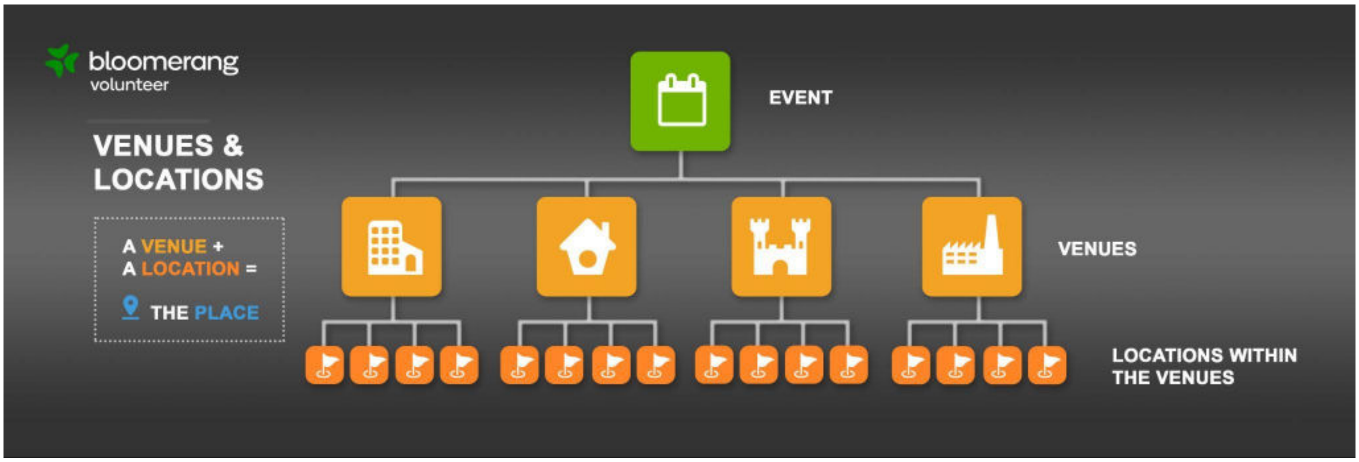
Bloomerang Volunteer provides special code that allows Administrators to embed Opportunities in an iFrame on an external webpage. This feature is useful for Organizations that want to showcase their Opportunities on their native website, without having to duplicate the information.

Chapter 5

Places: Setting Up Venues and Locations

Venues and Locations

Venues and Locations are stored at the Opportunity Level, and are used to help define specific areas. If an Opportunity leverages the Schedule, Venues and Locations must be created and are required.



Architecting Places

When combined, Venues and Locations make up a 'Place'. Venues and Locations are designed to be very flexible, and can be defined in many creative ways. Bloomerang Volunteer allows Administrators to create and manage an unlimited number of Venues and Locations within an Opportunity.

- **What is a Venue?**

  Typically, a Venue is defined by the physical place where the Opportunity is happening. This is usually a building with a street address or an identifiable location on a map.

  > *For example, a Venue could be a building or facility, a site or large area, a destination, a floor or level, or creatively speaking, a virtual space.*

- **What is a Location?**

  Locations are specific areas within a Venue.

  > *For example, Locations could be each floor within the building or facility, different stages or tents at an outdoor music festival, different rooms on a floor, different tables inside the library, etc.*

Locations are directly associated with the Schedule, primarily used to specify where the exact place Staff and Volunteers will be working during their Shift.

◈ How to Leverage Multiple Places?

Multiple Schedules within a single Opportunity can be achieved through using multiple Venues.

> **♦ Tip**
>
> The advanced search and filtering capabilities on the Bloomerang Volunteer Schedule allow Administrators to quickly view the Schedule by each Venue and even by each Location, enabling Administrators to easily manage a complex schedule.

✪ Best Practices

- When running a very large Opportunity or Program, it may be best to run multiple Opportunities that are defined by each Area. This will help make the Places within them become more specific.
    - *For example, when running an Olympic sized Opportunity, the individual sporting facilities can each be their own Opportunity, the Venues could be the floors within those facilities, and the Locations could be the stations on each of those floors.*
- When running a very simple Opportunity, there may only be one Venue and one Location required.
    - *For example, when running an Opportunity that is defined by a Job title (e.g. the 'Security' Opportunity), it happens at the same place and time every week. The Venue would be the 'Concert Venue', and the Location would be the 'Front Door'.*
- Make sure to include all relevant information, such as the exact address and any additional details into the description of the Venues and Locations. The more info you provide the easier it will be for staff/volunteers to find the areas they are scheduled in.

    ✔ Pros of using detailed Venues and Locations

    - The more detail about an Opportunity that is provided to the Staff and Volunteers, the more engaged they will be.

- Ensuring that directions and addresses are clear and in the system will help Users navigate to the Shifts they are working.

✘ **Cons of using simple Venues and Locations**

- When creating Venues and Locations if there are not enough details entered it can become confusing for the Users. If no specific address or precise location is input, the Users may not arrive on time, and potentially affect how the Opportunity is running.

⧫Tips and Tricks

- If the Venue is very detailed, a map could be put in the Documents section so that Staff and Volunteers can reference it through the web or mobile app.
- Venues and Locations can be copied laterally across Opportunities; doing this will save time, and keep the data consistent.
- If the Opportunity has several Venues and multiple Locations within each of them, create them in the Venues and Locations Tab prior to starting the Schedule. This will make it easier to ensure all additional information and descriptions are included.
- When running a very large and complex Schedule, break Opportunities out by the Venues.

Chapter 6

Groups: Registration, Scheduling, and Attendance Tracking

Group Types

Bloomerang Volunteer supports three different types of Groups: Number-based Groups, Account-based Groups and Email-based Groups.

➊ Account-Based Groups

◈ What is an Account-Based Group?

An Account-Based Group requires Staff to have an Bloomerang Volunteer account in order to be a part of it. These Groups consist of existing User Accounts, both claimed and unclaimed.

> ***Example of Account-Based Group***
>
> *A large corporate group of volunteers that want to be associated with the same company, but each member wants to be able to individually make their own selections for roles, qualification, availability, and shifts.*

⚙ Basic Settings and Permissions

- Users can only be part of 1 group at a time.
- Visibility: Account-Based Groups will always be publicly visible in the Signup Workflow.
- Leader: Group Leaders are responsible for overseeing their group members but do not have management capabilities. Group leaders cannot be changed.

✔ Pros of using Account-based Groups:

- Administrators will be able to collect data and communicate with every account holder.

✘ Cons of using Account-based Groups:

- Administrators cannot hide account-based groups from displaying in the Signup Workflow.

❷ Number-Based Groups

◈ What is a Number-Based Group?

A Number-Based Group is based on an arbitrary number of people being committed to the Opportunity. Number-Based Groups do not require all members to have accounts in Bloomerang Volunteer and are not associated with any User except for the Group Leader. The Group Leader is responsible for providing the total number of dedicated people.

> ***Example of Number-based Group***
>
> *A family of 4 that would like to volunteer together and only want to create one account.*

⚙ Basic Settings and Permissions

- Users can only be part of 1 group at a time.
- Visibility: Number-Based Groups are not visible to other Users during the Signup Workflow, and cannot be larger than 101 Users.
- Leader: Group Leaders are responsible for overseeing their group members but do not have management capabilities. Group leaders cannot be changed.

✔ Pros of using Number-Based Groups:

- Not everyone will require a Username and Password in order to be Scheduled.
- Number-based Groups can be split up and Scheduled across Shifts.

✘ Cons of using Number-based Groups:

- It is up to the Group Leaders to communicate to the Number-based Group members on where they are Scheduled. Sometimes, poor communications between the Leader and Group Members can disrupt operations.
- Number-based Group Members cannot be assigned a name or account and will always remain anonymous in the system.

③ Email-Based Groups

What is an Email-based group?

An Email based group is a group that has multiple Bloomerang Volunteer accounts that are only associated with one email address.

How do I create an Email-based group?

If a group wishes to be an account based group, but only has one valid email address, use a “+” within an email address to create new users that all point to one email address. The standard Email protocol will ignore anything after the “+” within the email address, this allows for multiple accounts with only one actual email address.

Example of an Email-based Group

The email being used by the Smith Family is “Smith@demo.bloomerang.com”, and within this group there is: John, Jane, Jimmy and Jenna. This family style Group wants to sign up for different Opportunities and have their own independent Schedules. The emails used in this case are:

John (the primary account holder)

Smith@demo.bloomerang.com

Jane

Smith+jane@demo.bloomerang.com

Jimmy

Smith+jimmy@demo.bloomerang.com

Jenna

Smith+jenna@demo.bloomerang.com

This setup will allow all communications to be sent to “Smith@demo.Bloomerang Volunteer.com”, but will include the name of the User it is being sent to and the data relevant to the individual.

Best Practices

This is a best practice when there is a need for a mix of account and number based groups. While all the members are not anonymous in the system, they are tied to one email address for all communication.

✔ **Pros of using Email-Based Groups:**

- Allows for a group using one email address to be able to sign up and register as an individual.

✘ **Cons of using Email-Based Groups:**

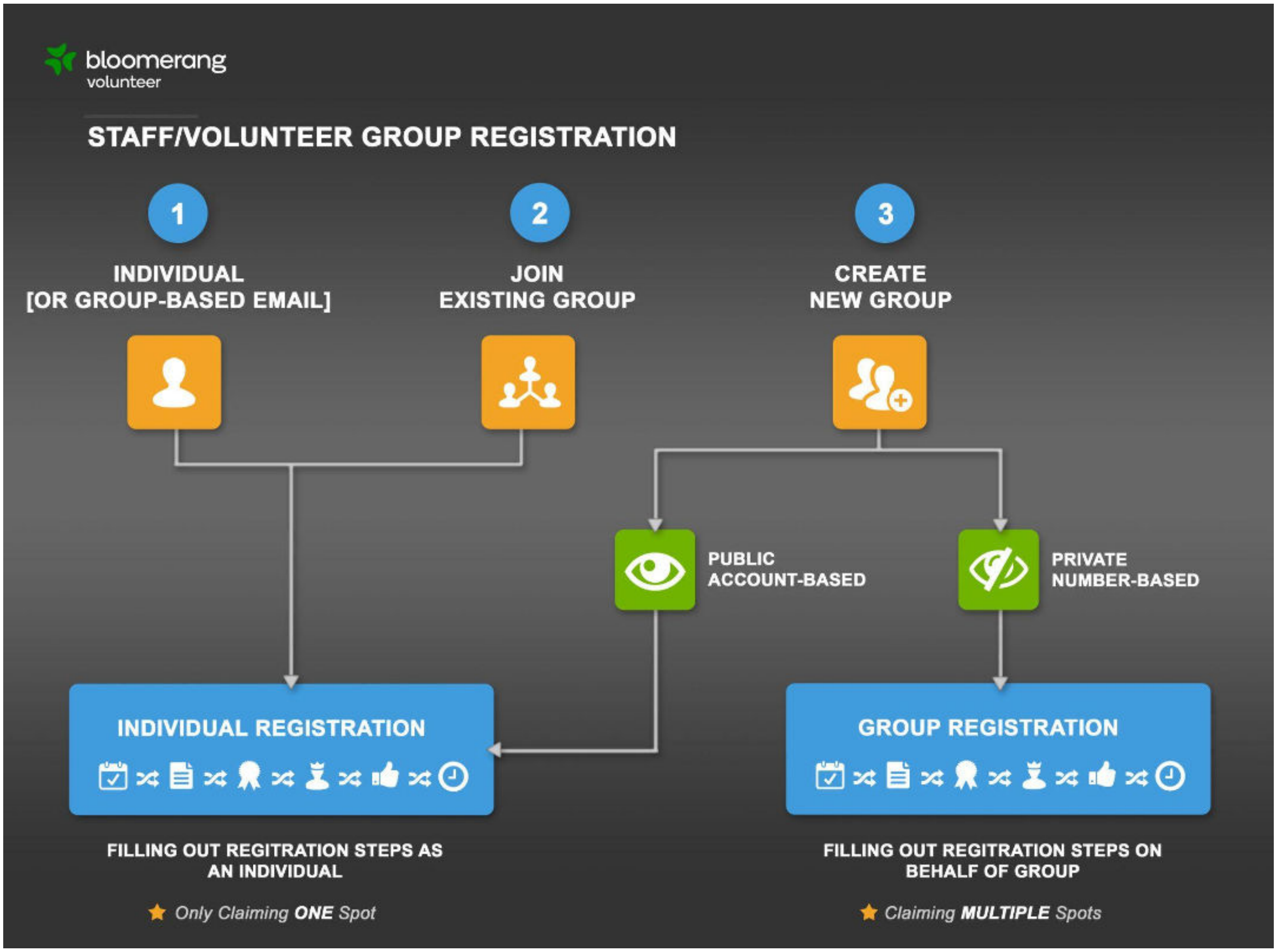
- Communications could become overwhelming depending on group size. This also requires more attention when registering the accounts, as information must be filled out according to the correct User.

⧫Tips and Tricks

- It may be beneficial for a Manager to help guide these Users when they create and set up their email-based group accounts.
- If the manager creates the accounts on behalf of the Users, it might be faster to import a list of the "+" emails (depending on the size).
- For communication purposes, it may be beneficial to message the main account with a list of the new User Accounts.

Joining an Opportunity

Staff/Volunteers can join an Opportunity in 3 ways: they can join as an individual, they can join as part of an existing group, or, they can join by creating their own group.



➊ Joining an Opportunity as an Individual

When a staff/volunteer joins an opportunity as an individual, it means that they will continue down the regular Signup Workflow as an individual, not associated with any group. This means that they will claim Roles, Shifts, Availability, etc. for themselves and not on behalf of a group.

❷ Joining an Opportunity as part of an Existing Group

When a staff/volunteer joins an Opportunity as part of an existing Group, it means that they will continue down the regular Signup Workflow as an individual that is associated with a Group. This means that they will claim Roles, Shifts, Availability, etc. for themselves and not on behalf of their Group.

❸ Joining an Opportunity as a New Group

A staff/volunteer can join an Opportunity by creating a new group, which can be either a Number-based or Account-based Group. When a user creates a new Group, they are automatically designated as the Group Leader.

Creating an Account-Based Group

When a User is the Group Leader of an Account-based Group, they will only claim Roles, Shifts, Availability, etc. for themselves and not on behalf of a group.

Creating an Number-Based Group

When a User is the Group Leader of a Number-based Group, they are dedicating an arbitrary number of Volunteers they are bringing to the Opportunity. The Leader is responsible for inputting the specific number they are representing. In this case, they will claim Roles, Shifts, Availability, etc. on behalf of everyone in the Group. Any information provided will be attributed to all members of the Group.

Setting Up Group Registration

Group Registration is part of the customized Signup Workflow. It is up to the Manager to decide whether or not they want Users to create new Groups or identify as part of an existing Group.

⚙ Basic Settings

Group Registration can be enabled as a Form Question in the Signup Workflow.

- Group Registration ON: When enabled, Staff/Volunteers will be presented with the option to sign up as part of an existing Group, or be able to register a new Group. Users will only be able to join Account-Based Groups during this process as Number-Based Groups do not allow for multiple Users with accounts to be a part of them.

- Group Registration OFF: When disabled, Staff/Volunteers will not be able to register as a new or existing Group.

⧫Tips and Tricks

- If a Manager wants to limit the number of Groups that can be created during the Signup Workflow they can turn OFF Group Registration and use Form Questions to collect information. Managers can create Groups post-registration based on how Users answer specific form questions.

Scheduling and Rostering Groups

Scheduling and Rostering Groups vary depending on the Group Type.

Scheduling Account-Based and Email-Based Groups

All members of an Account-Based or Email-Based Group are associated with an individual Bloomerang Volunteer Account. This means that the Group Leader and Group Members are Scheduled as Individuals, whether they are self-selecting Shifts or being manually Rostered by a Manager.

Scheduling Number-Based Groups

Group Leaders of Number-Based Groups will always be tagged with the Number of Staff they are representing. When being manually Rostered by a Manager, the members of Number-Based Groups can be split or divided across Shifts,or, they can be scheduled into Shifts together.

For Example, The Brown Family of 4 can be broken up into two groups of two.

When a Number-based Group Leader is self-selecting Shifts, they cannot split or divide their groups up across Shifts. This means that their Group will always be scheduled in Shifts together.

Tracking Group Attendance and Hours

Group attendance can be tracked using the General Check-in or the Shift Check-in feature.

Account-Based and Email-Based Groups

When tracking the attendance of Account-Based and Email-Based Groups, the check-in action is performed on the individual account. The system will record the ins and outs of each User account, and attribute the total accumulated hours towards the Group. Managers are always able to see a real-time view of which Users are currently checked-in or checked-out at any given time.

Number-Based Groups

When tracking the attendance of Number-Based Groups, the check-in action is performed on the Group Leader. The specific number of volunteers arriving or leaving is also recorded. This ensures that an accurate total hours for all of the Number-Based Group members are calculated.

✔ Pros of Tracking Hours for Groups

- Depending on the Group, they may need to report back to a company or school with the total number of hours that the Group volunteered. Properly tracking the ins and outs of all Group members will make this easy to do.

✘ Cons of Tracking Hours for Groups

- If number-based Groups are not properly checked in and out of Shifts, the total hours worked will not be reflective of what was actually worked.

⧫Tips and Tricks

- Make the Group Leader a Shift Supervisor so that they can look after all the check-ins for the Group.

- The **Hours Worked Overview For Groups** report will list all Groups and the total number of hours worked for either Account-Based or Number-Based Groups.

Chapter 7

Availability: Types of Availability and How to Collect

Collecting Availability

Collecting Availability includes the specific dates and times that Users are free to work, but more specifically, when they are NOT free to work.

◈ **What is Availability?**

Availability is the preferred time that Users would like to be Scheduled to work.

◈ **Why Collect Availability?**

Collecting Availability makes Scheduling easier, and more accurate for Administrators by reducing the amount of Scheduling Conflicts and ensures Users won't be Scheduled outside of their preferred time. This helps reduce the number of no-shows for the Opportunity.

✔ **Pros of Collecting Availability**

- Collecting Availability during the Signup Workflow can help Administrators use *Roster Mode™* more efficiently and quickly fill in gaps in the Schedule.
- If Availability is enabled in the Signup Workflow, Staff and Volunteers will be presented with Shifts that match the date and times they are available for.

✘ **Cons of Collecting Availability**

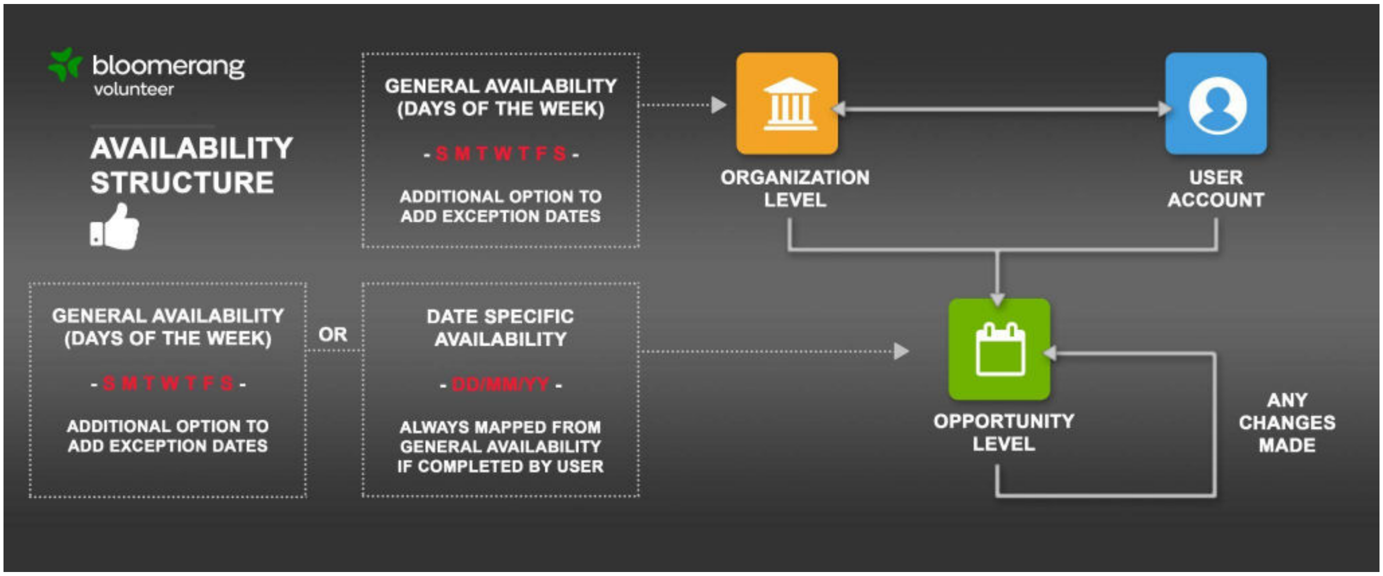
- Users may not realize what time the Shifts occur or take the created time blocks into account when they fill out their Availability. This could result in the Users not displaying as a Best Match in the *Roster Mode™* engine when Administrators are manually rostering.

⧫**Tips and Tricks**

- Make sure to collect Availability if any amount of Manual Rostering is going to be taking place.

Types of Availability

Availability can be tracked at both the Organization Level and Opportunity Level and can be collected in three different ways: General Weekly Availability, Date Specific Availability, and through Customized Form Questions.



❶ General Availability

General Availability is designed for ongoing scheduling purposes and primarily collected by Administrators at the Organization Level.

- **What is General Availability?**

  General Availability is mapped to specific days of the week *(For example, Mondays, Tuesdays, Wednesdays, etc.*). It also includes special exception dates, allowing Users to input dates that fall outside of their weekly routine *(For example, vacation days, sick days, or special times outside of the usual Availability)*. General Availability is also tied with the Schedule, Rostering and Shift Selection; it will alert the User or Administrator about discrepancies and conflicts when they are being added to a specific Shift.

- **What Level of the system is General Availability stored at?**

  General Availability is mapped to a User's Account (not to an Opportunity, and not to an Organization). The purpose of mapping the General Availability to an account is so that Users do not have to re-input their Availability across every opportunity (or across Organizations) every time they want to sign up for something.

How does General Availability work?

General Availability presented at the Account Level, and General Availability presented at the Organization Level are exactly the same. If changes are made in one area, they will be changed/reflected in the other area.

Best Practices for Using General Availability

When Running Many Opportunities

Collecting General Availability during the Organization Signup Workflow will save Users a lot of time when registering for individual Opportunities, as their Availability will be automatically populated into each Opportunity they register for.

When the Opportunity is set up as an Ongoing Program

Collecting General Availability will be beneficial for any long-running schedule that has recurring or weekly Shifts. By using the General Availability Users will see Shifts that fit within their weekly General Availability.

2 Date Specific Availability

Date Specific Availability is designed for smaller short-term opportunities *(such as Events)*, and primarily collected by Administrators at the Opportunity Level.

What is Date Specific Availability?

Date Specific Availability is mapped to specific calendar dates *(For example, July 5th, July 6th, July 7th and July 10th).* It also includes special exception dates, allowing Users to input dates that fall outside of their weekly routine *(For example, vacation days, sick days, or special times outside of the usual Availability)*. Date Specific Availability is also tied with the Schedule, Rostering and Shift Selection; it will alert the User or Administrator about discrepancies and conflicts when they are being added to a specific Shift.

What Level of the system is Date Specific Availability stored at?

Date Specific Availability is stored at the Opportunity Level, and is independent across each Opportunity.

How does Date Specific Availability work?

Date Specific Availability is populated from the days that are Scheduled within the Opportunity. This means that any date in the Schedule that has a populated Shift on it will be listed in the Availability selector. If Availability has already been populated at the Organization/Account Level, Bloomerang Volunteer will automatically map the General Availability with the specific Dates to reduce time for Staff and Volunteers.

> *For example, if Mary has Tuesday nights from 5pm-9pm available at the Account Level, and there is a Tuesday night in an Opportunity (Ie: Tuesday July 5th), Bloomerang Volunteer will automatically set Mary to be available on that Tuesday night (July 5th) in the Opportunity.*

Any changes made to the Availability at the Opportunity Level will NOT transfer up to the Organization Level, and therefore can be changed and customized to fit any Opportunity.

✪ **Best Practices for Using Date Specific Availability**

When Running a Short-Term Opportunity

Collecting Date Specific Availability will save the Staff and Volunteers time if they only have to fill in their availability for 3 days as opposed to the General Availability mapping to the 7 days of the week.

❸ Availability through Customized Form Questions

If the two previous Availability features are too complex, Availability can also be collected in a simpler style. Availability can be tracked through the creation of a Custom Question on the Recruitment Form *(For example, a multi-select answer option can be created for “Tuesday Nights”, “Saturday Mornings” and “Thursday Afternoons”).*

✪ Please Note, this is NOT a recommended best practice. The Schedule Conflicts and Best Match suggestions when Rostering will not be tied to the Custom Question Answers, making the Schedule more vulnerable to errors.

Chapter 8

Scheduling: Setting Up the Schedule, Rostering, and Self-Signup

Architecting Shifts

Shifts are stored at the Opportunity Level, and are used to help define the Schedule.

Components of a Shift

Every Shift contains the following data:

- **Shift Title**

  The title or name associated with the Shift. This component is not required.

  For example, Shifts can be titled by the time of day such as, “Morning Set up”, “Afternoon Operations”, "Evening Tear down”.

- **Shift Color**

  Shifts can be color-coded as an additional way to categorize them. This component is required.

  For example, Shifts in each Venue can be a specific color, or, Shifts in each Role can be a specific color, etc.

- **Date, Start Time, End Time**

  When the Shift is happening, and the specific date and time. This will be in the time zone that the Opportunity was created with. These components are always required.

- **Venue and Location**

  This is where the Shift takes place. This component is always required

- **Shift Description**

  Additional information about the Shift that Users should be aware of. This component is not required.

  For example, special instructions or reminders.

- **Roles**

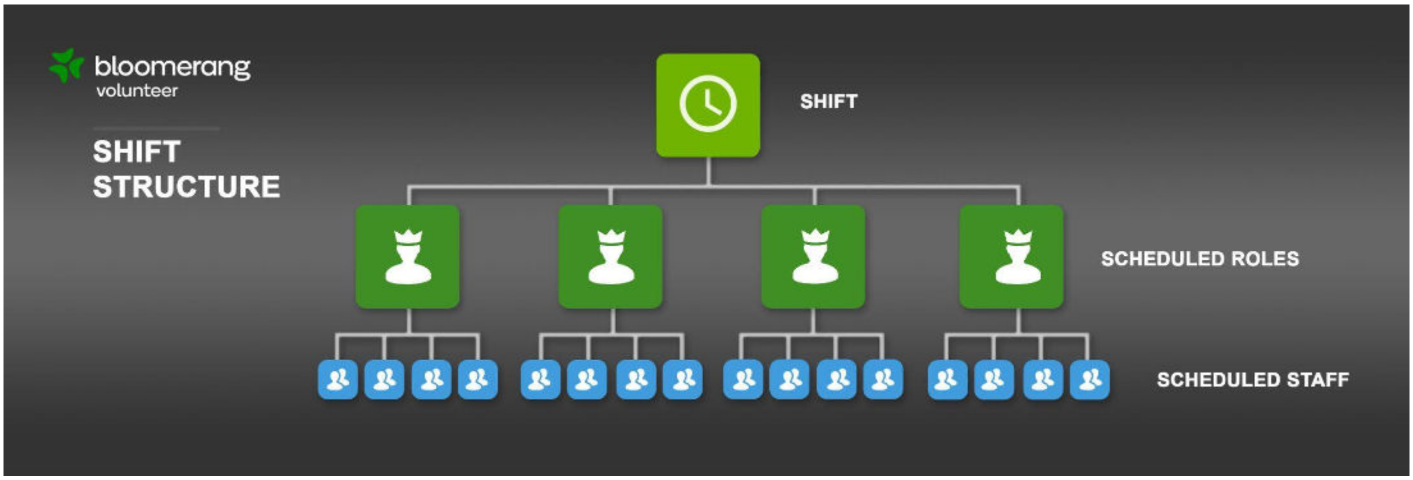
  These are the Tasks/Jobs/Roles that are needed for the Shift. There can be multiple Roles per Shift. Roles can be set as Public or Private per Shift. Roles are only required on a Shift if Users need to be Scheduled.

Scheduled Staff

These are the Users that have been assigned into the Scheduled Role in the Shift.

Shift Structure

Shifts have 3 main levels: the Shift details, the associated Roles and the Scheduled Staff within those Roles.



What are the Shift Details?

Shift Details are the high-level components of the Shift.

What are Scheduled Roles?

Scheduled Roles are the Roles that are assigned to the Shift. A single Shift can have one or many Roles within it.

What are Scheduled Staff?

Scheduled Staff are the Users that are assigned to the Scheduled Role within the Shift.

Best Practices when creating Shifts

Single Role in a Single Shift

If there are not many Shifts in the Schedule, or, if none of the Shifts have the same Start and End time or Location, it's best to only include one Role per Shift. This will help to increase visibility over problem areas by having each Shift represent a Scheduled Role.

Multiple Roles in a Single Shift

If there are many Shifts in the Schedule that have the same Start and End time, and are taking place at the same Location, it's best to create 1 Shift with many Roles inside it. This will streamline any Scheduling changes to Shift Details, reduce the amount of clutter displayed in the interface, and make it more efficient to build out the Schedule.

Roles vs. Scheduled Roles

Both Roles and Scheduled Roles have visibility settings to determine whether or not they show up in the Signup Workflow.

◈ What is a Role

Traditionally, Roles are defined as the tasks, jobs or positions that are used to tag and categorize Users within the Opportunity.

⚙ Basic Settings

- **Public** Signup Visibility: Users are able to select the Role during the Signup Workflow if the "Role" step is enabled. Setting a Role as public allows any User to select it as long as they have the Qualifications that are required for it.

- **Private** Signup Visibility: A Role that has specific requirements that the Administrator wants to assign themselves. Setting a Role as private will not allow any Users to select in the Signup Workflow, Administrators must manually assign them.

◈ What is a Scheduled Role?

A Role that has been assigned to a Shift.

⚙ Basic Settings

- **Public** Signup Visibility: Users are able to select the Scheduled Role *(in the Shift)* during the Signup Workflow if the "Shift" step is enabled. Setting a Scheduled Role as public allows any User to select it as long as they have the Qualifications that are required for it.

- **Private** Signup Visibility: A Scheduled Role that has specific requirements that the Administrator wants to assign themselves. Setting a Scheduled Role as private will not allow any Users to select in the Signup Workflow, Administrators must manually Roster them.

◈ How do Roles and Scheduled Roles work together in the Signup Workflow?

Below are the possible combinations of Role and Shift settings:

1. **Public Role and Public Scheduled Role (/Shift)**

   The Role and all associated Shifts are available for all qualified Users to select if enabled in the Signup Workflow.

2. **Private Role and Private Scheduled Role (/Shift)**

   The Role and all associated Shifts are not available for Users to select. An Opportunity Manager and/or Role Manager will need to add Users to the Role and Shifts.

3. **Private Role and Public Scheduled Role (/Shift)**

   An Opportunity Manager must appoint the Role to Users, but once appointed Users will be able to select Public Shifts if enabled in the Signup Workflow.

4. **Public Role and Private Scheduled Role (/Shift)**

   The Role is available for all Qualified Staff to select if enabled in the Signup Workflow, but Private Shifts must be appointed by an Opportunity Manager and/or Role Manager.

Visualizing the Schedule

The Administrator's version of the Schedule can consist of one or many Shifts depending on how the Opportunity is set up and offers a large amount of settings and data visualizations. It is up to Administrators to build out and create the Shifts.

❶ Primary Components

Filters

All visualizations of the Schedule can be filtered down to show a very specific set of data. There are many filters to experiment with; when there is too much information displaying at once, try enabling a couple of filters. *For example, filters allow Administrators to see the Schedule for a particular Day, Venue, Role or even areas that are Understaffed or Overstaffed.*

Selections

Regardless of the visualization style or view of the schedule, all Shifts can be selected individually or in bulk to perform further actions. *For example, in the Scheduled Roles Calendar Day view, multiple Shifts can be selected for actioning.*

Bulk Actions

Bulk actions can be performed on all components of a Shift and in all visualizations of the Schedule. Save time creating the schedule by making edits in bulk. *For example bulk actions allow Administrators to move time blocks of Shifts, change settings, update descriptions and even Copy Shifts.*

❷ List Visualization Style

What is the List Visualization?

The List View of the Schedule is designed for the analytical type of User. Similar to a spreadsheet, this view allows Administrators to search, organize, sort and customize the desired set of data.

What is the Purpose of the List Visualization?

The purpose of this view is to see a deeper level of data in one snapshot.

Basic Settings

- Show/Hide Columns: Select the Columns to display and hide.
- Column Actions: Manipulate the layout of the columns:
    - Drag and Drop the order
    - Sort the rows
    - Expand row (See More)
    - Extend or Shorten the column width
    - Reset columns back to the default view

Best Practices when using the List Visualization

- Drag and Drop to arrange the order of the columns.
- Sort the columns to help organize a better view.
- Columns can be shown or hidden from the master view. The default view will not include all of the columns, be sure to check what other columns are available.
- List views can always be exported to .CSV for further manipulation.

3 Calendar Visualization

What is the Calendar Visualization?

The Calendar Visualization of the Schedule is designed for the type of User that prefers a more visual representation of the Shifts. The Calendar can be manipulated to display by Month, Week, Day and Hourly views.

What is the Purpose of the Calendar Visualization?

The purpose of this view is to show the physical Schedule blocks against a timeline. This visualization helps Administrators quickly identify gaps or discrepancies in the Schedule.

Basic Settings

- Show/Hide Details: Select the information to display and hide on the Shift blocks.
- Calendar Views:
    - Day

    - Week
    - Month
- Calendar Actions:
    - Today
    - Back / Forth
    - Select a Specific Date

✪ **Best Practices when using the Calendar Visualization**

- In the Scheduled Shift and Scheduled Role views, dragging the cursor across a timeline will create a Shift. This is a much easier and faster way to create Shifts.
- Shifts can be bulk selected and moved by simply dragging and dropping.
- Shifts can be bulk selected and shortened or extended by selecting the edges of the blocks and dragging them.
- All the data that is displayed on the Shift blocks can be shown or hidden from the master view. The default view will not include all of the data options, be sure to check what other data options are available.
- Shift-block colors can be turned off to better see the performance indicators. For example, in the Scheduled Roles view, turning off Shift color will better highlight the Shifts that are red and in trouble. In the Scheduled Staff view, turning off Shift color will better highlight the Shifts that have not been Confirmed.

⧫**Tips and Tricks**

- Use the print screen or screen capture function on the computer to print or download the calendar visualization.

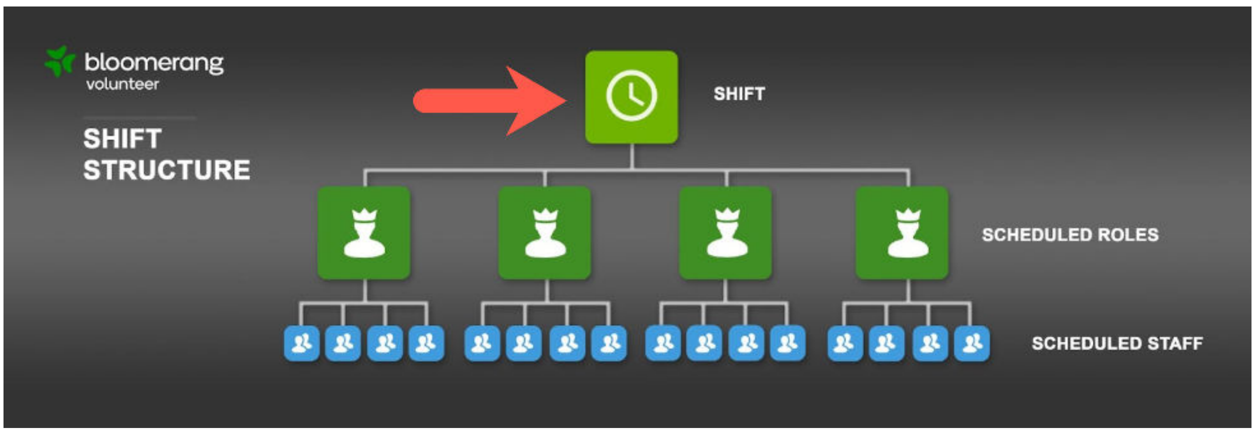
Schedule Views

The Schedule is broken down into the three main views: by Shift, by Scheduled Role and by Scheduled Staff. These views align with the Shift Structure.

❶ Scheduled Shifts View

What is the Scheduled Shifts View?

In the Structure of a Shift, the Scheduled Shifts View outlines the top layer, displaying all of the Shifts that Roles and Staff are Scheduled in. The diagram below shows the layers and structure of a single Shift and focuses on the view from the top level.



What is Purpose of the Scheduled Shifts View?

The purpose of this view is to build the Schedule and see the high-level details of the Scheduled Shifts. This view is used to create Shifts individually or through copying, and to edit the details of a Shift independently or in bulk. *For example, Administrators can make edits to the Shifts' Date, Time, Length, Venue, Location or Roles within it.*

Basic Settings

These settings can be applied to both the List and Calendar visualizations.

Bulk Actions

These are actions that can performed across multiple Shifts:

- Export to .CSV: Download all Shift details into a .CSV file.
- Send Message: This message will be sent to all Staff who are in each of the Scheduled Roles within the Shift.

- Request Schedule Confirmation: All Staff in each of the Scheduled Roles within the Shift will be sent an email prompting them to Confirm or Decline their attendance on Shifts they are Scheduled in.
- Copy Shifts: Select the dates and components of the Shift to copy.
- Move Time: Move the Shifts' start time forward or backwards by hours or minutes.
- Move Day: Select the specific calendar date to move the Shifts to.
- Add/Remove Roles: Add a single or multiple Roles to Shifts, or, remove a single or multiple Roles from Shifts.
- Change Venue and Location: Change the place the Shifts are taking place.
- Change Shift Color: Change the primary color of the Shifts.
- Change Shift Title and Description: Add key details and important information to Shifts.
- Change Staff Required and Signup Limits: Change the minimum amount of Staff required in the Shift, and the maximum amount of Staff required in the Shift.
- Change Signup Visibility: Change the Signup Visibility on the Scheduled Roles to Public or Private.
- Delete Shift: Permanently remove Shifts from the Schedule.

Filters

These are filters that can narrow down the data displaying in the Schedule, and can be used to achieve custom views:

- Search: Type in any attribute of the Shift to narrow down the view.
- Venues and Locations
    - Scheduled at any of these locations
    - Not scheduled at any of these locations
- Date
    - Scheduled on
    - Not Scheduled on
- Time
    - Is occurring at
    - Starts at or before

    - Starts at or after
    - Is between
- Current Shifts
    - Shifts happening now
    - Shifts not happening now
- Roles
    - Has any of these Roles
    - Does not have any of these Roles
- Public/Private Roles
    - Shift contains private Roles
    - Shift does not contain private Roles
    - Shift contains public Roles
    - Shift does not contain public Roles
- Schedule Shortages

  Scheduled Roles that are:
    - No Scheduled Staff
    - Understaffed
    - Achieved Staff Required
    - Full / Reached Signup Limit
    - Below the Signup Limit
- Staff Required and Signup Limit
    - Has a Staff Required value set of
    - Has a Signup Limit value set of
- Length
    - Shifts that are longer than
    - Shifts that are shorter than
    - Shifts that are equal to
    - Shifts that are between
- Shift Confirmation
    - Any Staff with pending or unsent confirmations

    - Any Staff with declined confirmations
    - Any Staff with confirmed Shift Confirmations
- Staff Scheduling Conflicts
    - Has any of these conflicts
    - Does not have any of these conflicts

List View Columns

Select the Columns to display and hide:

- Shift Title
- Place
    - Venue
    - Location
- Shift Time
    - Date
    - Start
    - End
    - Length
- Total Roles
- Roles
- Shift Color

Calendar View Shift Block Details

Select the information displaying on the Shifts.

- Start Time
- End Time
- Length
- Scheduled Roles
- Shift Colors
- Shift Title
- Staff Scheduled

- Venue - Location

✔ **Pros of using Scheduled Shifts View**

- Allows Administrators to easily see a full picture of the Shift and its overall health.
- Manipulations to the Shift details can be done in this view.
- Copying Shifts can be performed in this view.

✘ **Cons of using the Scheduled Shifts View**

- Scheduled Staff are not visible in this view.
- Rostering Staff Requires two steps instead of one, as you first have to select the scheduled role.

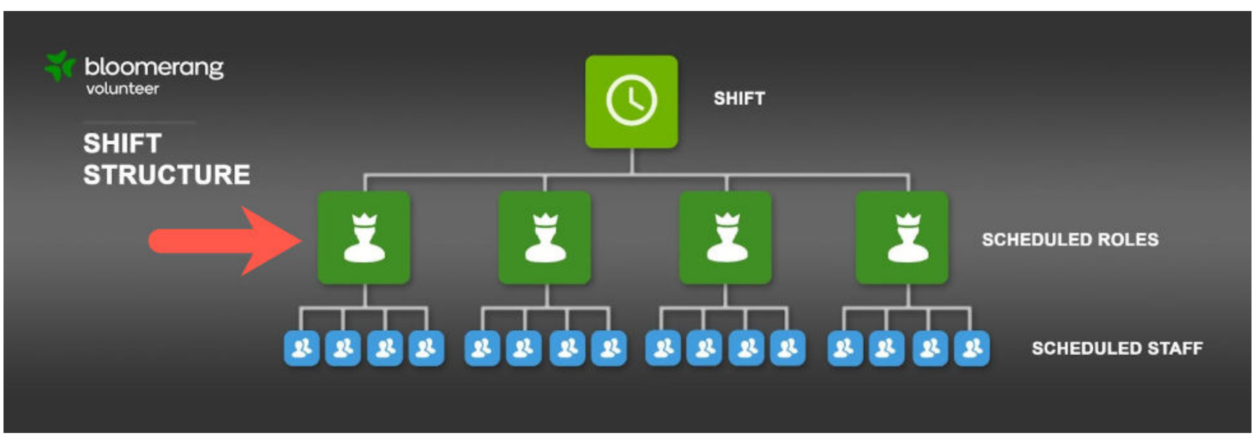
✪ **Best Practices when using the Scheduled Shifts View**

Always use this view to build and create Shifts.

❷ Scheduled Roles View

◈ What is the Scheduled Roles View?

In the Structure of a Shift, the Scheduled Roles view outlines the middle layer displaying all of the individual Roles that are scheduled within each Shift. The diagram below shows the layers and structure of a single Shift and focuses on the view from the middle level.



◈ What is the Purpose of the Scheduled Roles View?

The purpose of this view is to monitor the overall performance of the Schedule and provides a detailed view of where the gaps in the Schedule are. In this view, Administrators can quickly fill the Schedule gaps by Rostering directly to them.

⚙ Basic Settings

These settings can be applied to both the List and Calendar visualizations.

Bulk Actions

These are actions that can performed across multiple Scheduled Roles:

- Export to .CSV: Download all Scheduled Role details into a .CSV file.
- Send Message: This message will be sent to all Staff who are in the Scheduled Role.
- Request Schedule Confirmation: All Staff in the Scheduled Role within the Shift will be sent an email prompting them to Confirm or Decline their attendance on Shifts they are Scheduled in.
- Change Staff Required and Signup Limits: Change the minimum amount of Staff required in the Scheduled Role, and the maximum amount of Staff required in the Scheduled Role.
- Change Signup Visibility: Change the Signup Visibility on the Scheduled Role to Public or Private.
- Delete Shift: Permanently remove scheduled Role from the Shift.

Filters

These are filters that can narrow down the data displaying in the Schedule, and can be used to achieve custom views:

- Search: Type in any attribute of the Scheduled Role to narrow down the view.
- Venues and Locations
    - Scheduled at any of these locations
    - Not scheduled at any of these locations
- Date
    - Scheduled on
    - Not Scheduled on

- Time
    - Is occurring at
    - Starts at or before
    - Starts at or after
    - Is between
- Current Shifts
    - Shifts happening now
    - Shifts not happening now
- Roles
    - Has any of these Roles
    - Does not have any of these Roles
- Signup Visibility
    - Public
    - Private
- Schedule Shortages

  Scheduled Roles that are:
    - No Scheduled Staff
    - Understaffed
    - Achieved Staff Required
    - Full / Reached Signup Limit
    - Below the Signup Limit
- Staff Required and Signup Limit
    - Has a Staff Required value set of
    - Has a Signup Limit value set of
- Length
    - Shifts that are longer than
    - Shifts that are shorter than
    - Shifts that are equal to
    - Shifts that are between
- Shift Confirmation

    - Any Staff with pending or unsent confirmations
    - Any Staff with declined confirmations
    - Any Staff with confirmed Shift Confirmations
- Staff Scheduling Conflicts
    - Has any of these conflicts *(Overlapping Shifts, Availability, Overlapping Opportunity)*
    - Does not have any of these conflicts *(Overlapping Shifts, Availability, Overlapping Opportunity)*

List View Columns

Select the Columns to display and hide:

- Scheduled Roles
- Status
- Shift Time
    - Date
    - Start
    - End
    - Length
- Total Staff
- Scheduled Staff
- Settings
    - Staff Required
    - Signup Limit
    - Signup Visibility
    - Shift Title
- Place
    - Venue
    - Location
- Shift Description

Calendar View Shift Block Details

Select the information displaying on the Shifts.

- Role Title

- Start Time
- End Time
- Length
- Shift Colors
- Shift Title
- Signup Visibility
- Staff Scheduled
- Status of Role
- Venue - Location

✔ Pros of using Scheduled Roles View

- Scheduled Roles is the best view for Rostering as it shows the performance of each Role within a Shift as a separate line.
- Allows Administrators to easily manage low performing Shifts.

✘ Cons of using Scheduled Roles View

- This view does not provide a full overview of the Shift and all of the Scheduled Roles within it.

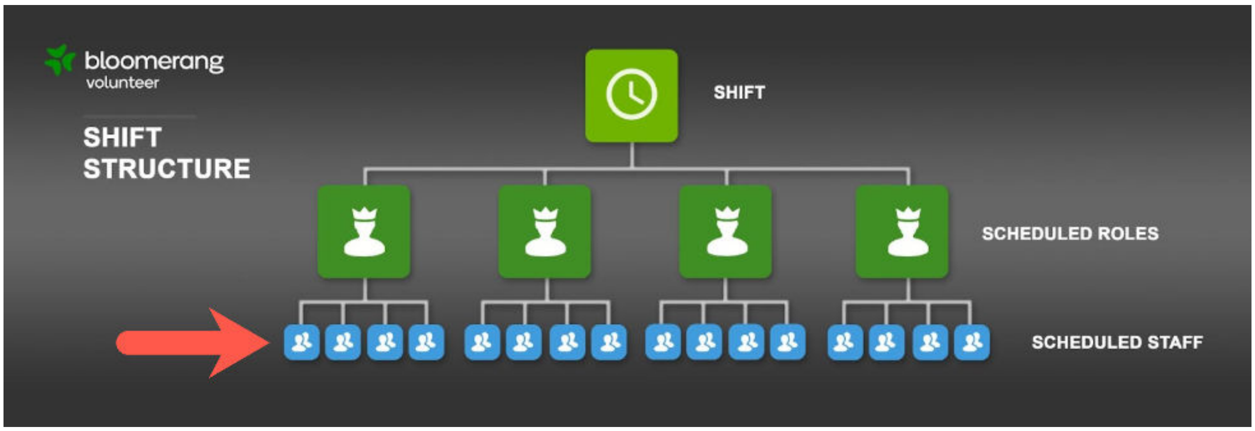
✪ Best Practices when using the Scheduled Roles View

- When manually Rostering Staff, this view provides the least amount of steps.
- When monitoring the health of the Schedule, use this view as it highlights how well each shift is performing per role.

❸ Scheduled Staff View

What is the Scheduled Staff View?

In the Structure of a Shift, the Scheduled Staff View outlines the bottom layer displaying all of the individual Shifts Staff are Scheduled in. The diagram below shows the layers and structure of a single Shift and focuses on the view from the bottom level.



What is the Purpose of the Scheduled Staff View?

The purpose of this view is to track Staff on a Shift by Shift basis. Managers can Unschedule Staff, monitor Confirmation Requests and Clock-in activity, and build custom data exports.

Basic Settings

These settings can be applied to both the List and Calendar visualizations.

Bulk Actions

These are actions that can performed across multiple Scheduled Staff:

- Export to .CSV: Download a custom set of details into a .CSV file.
- Send Message: This message will be sent to all selected Staff.
- Request Schedule Confirmation: Selected Staff will be sent an email prompting them to Confirm or Decline their attendance on Shifts they are Scheduled in.

- Send Personal Schedule: This will email a Personal Schedule to selected Staff. In addition, Staff will be prompted to confirm or decline their Shifts if they have been sent a Schedule Confirmation Request.

- Unschedule Staff: Remove Staff from the Scheduled Role.

Filters

These are filters that can narrow down the data displaying in the Schedule, and can be used to achieve custom views:

- Search: Type in any attribute of the Staff to narrow down the view.

- Shift-based Filters: This includes All of the filters listed in the Scheduled Role and Scheduled Shift Section above.

    - Check-in Status:

        - Is currently Checked-in to a Shift

        - Is not currently Checked-in to a Shift

- Form Question Filters: These filters include all of the template form questions and custom question filters.

List View Columns

Select the Columns to display and hide:

- Staff Details
    - Staff Scheduled
    - Staff Email
    - Mobile Phone Number
    - Date Joined Opportunity
    - Average Star Rating
    - Preferred Language
- Shift Information
    - Organization Name
    - Opportunity Name
    - Shift Title

    - Scheduled Roles
    - Conflicts
    - Place
        - Venue
        - Location
    - Shift Color
    - Shift Time
        - Date
        - Start
        - End
        - Length
    - Hours Scheduled
- Shift Check-In
    - Action
    - Group Members Currently Checked-in
    - Log
- Shift Confirmation
    - Confirmation
    - Status
    - Request Sent
    - Response
    - Reason
- Group Based
    - Group Title
    - Group Signup Visibility
    - Group Type
    - Group Status
    - Group Leader
    - Group Size
- Form Questions

    - Bio
    - Date of Birth
    - Gender
    - Mobile Phone Number
    - Address
        - Country
        - State / Province
        - City
        - Street Address
        - ZIP / Postal Code
    - Emergency Contact
        - Name
        - Mobile Phone Number
    - T-Shirt Size
    - Opportunity Waiver
    - Organization Waiver
    - All Custom Questions

Calendar View Shift Block Details

Select the information displaying on the Shifts.

- Role Title
- Start Time
- End Time
- Length
- Shift Colors
- Shift Title
- Signup Visibility
- Staff Scheduled

- Status of Role
- Venue - Location

✔ **Pros of using Scheduled Staff View**

- Staff Scheduling Conflicts are more visible and exposed.
- Confirmation state is more visible and exposed.
- Shift Check-in actions can be performed in this view.

✘ **Cons of using Scheduled Staff View**

- The List visualization of the Scheduled Staff view does not allow Administrators to use *Roster Mode*^{TM}.
- This view does not provide a full overview of the Shift and all of the Scheduled Roles within it.

✪ **Best Practices when using the Scheduled Staff View**

This view is best used for monitoring Scheduling Conflicts, Check-in/out activity, as well as Shift Confirmations and Declines.

Scheduling Staff

Manually Rostering vs. Self-Signup

Users can be placed into a Shift in two ways: manually by an Administrator, or a User can self-signup. Depending on how complex the Opportunity is, a single Schedule may require the use of both methods.

➊ Self-Signup Method

◈ What is Self-Signup?

Self-signup is when a User chooses the Shifts they want to work themselves. This is performed through the Shift selection step in the Signup Workflow.

⚙ Basic Settings

- Overlapping Shift: Allows Staff to select overlapping Shifts.
- Remove from Shift: Determines whether or not Staff can remove themselves from Shifts they are Scheduled in.
- Limit Shifts: Administrators can limit the number of Shifts Staff can select by providing a minimum and maximum amount of Shifts.
- Limit Hours: Administrators can limit the number of Hours Staff can select by providing a minimum and maximum amount of Hours .

✔ Pros of using Self-Signup

Self-signup is the recommended best practice if an Organization is looking to reduce administrative work. This method puts the majority of the work onto the Staff and Volunteers, and saves Administrators from spending time matching the best suited Staff with the appropriate Shifts. Typically, Users will know when they are available to work and will select the Shifts they can work.

✘ Cons of using Self-Signup

Although Self-signup to Shifts can be controlled through the limitation of Roles, Qualifications and Visibility Settings, it still offers less control than what an Administrator has when manually Rostering. Self-signup does not take into account the one-off unique special requests that naturally come up when managing people. *For example certain* *volunteers want to be paired together, some volunteers have really high scores and need to be placed into the priority Shifts, etc.*

✪ Best Practices when using Self-Signup

If certain Shifts require certain skills or Qualifications, make sure to enable additional steps in the Signup Workflow, such as the Role Selection Step and the Qualification Step. Enabling these additional steps will narrow down the Shifts Users can select and only display Shifts that the Users are Qualified for.

❷ Manually Rostering Method

◈ What is manually Rostering?

Manually Rostering is when an Administrator places or assigns Staff and Volunteers into a Shift. This is performed through the *Roster Mode*^{TM} action in various areas at the Opportunity Level.

What is *Roster Mode*^{TM} ?

Roster Mode^{TM} is a rostering engine that allows Administrators to fill Shifts in several ways by providing a list of either Best Matched Shifts or Best Matched Staff depending on where in the system the action is being taken.

✔ Pros of using *Roster Mode*^{TM}

Roster Mode^{TM} will quickly identify which Users are best suited for a certain Shift, or vice versa.

✘ Cons of using *Roster Mode*^{TM}

If not enough information was collected on Users in the Signup Workflow, *Roster Mode*^{TM} will not be able to provide accurate matches, potentially creating extra work for the Administrators in the long run.

✪ Best Practices when using *Roster Mode*^{TM}

Collecting the proper information (ie. Availability) from the Users during the registration process is key to having *Roster Mode*^{TM} work to its fullest potential.

⧫Tips and Tricks

Use *Roster Mode*^{TM} in the Scheduled Roles view of the Schedule to best fill gaps.

✔ Pros of manually Rostering

Manually Rostering Users gives Administrators complete control over who gets Scheduled where and allows Administrators to take into account all of the unique requests that come up when managing people.

✘ Cons of manually Rostering

Although the *Roster Mode*™ engine is designed to help Administrator increase the speed at which they place Staff into Shifts, manually Rostering Users will always take more time than the Self-signup method because the Administrator is taking on the majority of the work *(as opposed to the Self-signup methods that puts the majority of the work onto the Users)*.

✪ Best Practices when manually Rostering

Always collect Availability during the initial Signup Workflow. This will help the *Roster Mode*™ engine provide better matches. Users will not be Scheduled in Shifts they cannot work, and there will be fewer chances of no-shows or drop-offs due to competing timelines.

❸ Combination of both Methods

◈ What is a combination of both methods?

When a Schedule has complexities, it could require an Administrator to manually Roster certain Shifts, but also have Shifts available for general Self-signup.

✔ Pros of using both methods

This allows Staff and Volunteers to sign up for Shifts during the registration period, and also allows the Administrators to fill in gaps in low performing Shifts.

✘ Cons of using both methods

If communication is poor, this can potentially result in Staff and Volunteers getting confused as to why they are Scheduled in certain Shifts that they didn’t Self-signup for.

✪ Best Practices when using both methods

Keep communication open with the Users that are being Manually Rostered and let them know when they have been placed into a Shift.

Alternate Scheduling Methods

If the Opportunity requires a very light and simple Schedule, sometimes creating a full Schedule with Shifts is not the right approach. Users can be assigned a Job and Hours without creating a Schedule.

Method 1

Create Roles that include the required time commitment in the description or title, whether it's a start and end time, or the amount of hours it will take to complete.

- **Self-signup**

  Enable the Role step in the Signup Workflow and Users will be able to select the custom Roles.

- **Manually Assign**

  Bulk or individually add Users to the Roles.

Method 2

Create Custom Questions on the Form that mimic Shift-times.

- **Self-signup**

  Enable the Form Questions step in the Signup Workflow and Users will be able to select the custom time blocks.

- **Manually Assign**

  Fill out the custom time blocks on behalf of each User.

Method 3

Use the Opportunity container as the Shift/Task.

- **Self-signup**

  Display the primary details of the Shift, including the Schedule Type and Time on the Public Page. Use a simple-signup method by enabling only the Signup Button in the Custom Signup Workflow. This will require only one click for users to be registered to the Opportunity.

- **Manually Assign**

Display the primary details of the Shift, including the Schedule Type and Time on the Public Page, but disable the Signup Button. Manually add Users to the Opportunity and they will be associated with the details on the Public Page.

All Alternate Methods

✔ **Pros of using these methods**

- An entire schedule does not have to be built.
- Signup is very fast for staff and volunteers, and so is manually rostering.

✘ **Cons of using these methods**

- The system will not send automatic Shift reminders because the Roles and Event containers are technically not Shifts.

✪ **Best Practices when using these methods**

- Use the “General Check-in” for tracking attendance and hours.
- Since automated Shift reminders will not go out, make sure to manually send reminders to Staff in those Roles or Opportunities.

Chapter 9

Registration: Signup Workflow and Levels of Recruitment

Levels of Recruitment

Users can register to the system from both the Organization Level and the Opportunity Level, it is up to the Administrators to determine what Level works best for the Organization.

Organization Level

Recruiting from the Organization Level

◈ What is Recruitment from the Organization Level?

This brings Users into the highest level of the system, allowing Users to have visibility across all Signup Opportunities *(*settings permitted)*.

✪ Best Practices

If the Organization is set up to have multiple Opportunities running simultaneously, consider recruiting from the Organization Level. This allows Users to see all open Signup Opportunities within the Organization and is extremely helpful in keeping up engagement.

✔ Pros of using Organization Level Recruitment

- It makes a great central location for all Users to go.
- Users will automatically be able to Sign Up to Opportunities once they are Opened.

✘ **Cons of using Organization Level Recruitment**

- When running an Event or Program that has a particular established brand, recruitment from the Organization might throw off Users if they do not recognize the name, which could keep them from signing up to volunteer.

Applications to the Organization

Gating Recruitment at the Organization Level

Users can gain access into the Organization and become an official Organization Member in two ways: they can be automatically approved when they signup, or, they can be manually approved by an Administrator.

➊ Automatic Approval

◈ **What is Automatic Approval?**

Anyone who completes the Signup Workflow will be automatically added to the Organization's database / Staff List.

✔ **Pros of using Automatic Approval**

- Users gain fast entry to the Organization and are not left in a pending state.
- This requires less administrative work, saving time.

✘ **Cons of using Automatic Approval**

- Administrators don't have as much control over who is in their Organization.

✪ **Best Practices**

Automatic approval is best used for Organizations that will *"take anyone they can get"*, and don't require a heavy screening process. If the Organization can gather enough background information on Users through the Signup Workflow Steps, Automatic Approval will be the best option.

⧫ **Tips and Tricks**

- Users can always be removed from the Organization, which means that a screening process can still happen once a User is part of the Organization. Form Question Answers can be used to weed out Users based on their answers.

❷ Manual Approval

◈ What is Manual Approval?

Anyone who completes the Signup Workflow will not be directly added to the Organization's database *(Staff List)* until they are approved by an Administrator. Administrators can also reject applications if they are not suitable.

✪ What States can the Users be in?

Accepted

Once a User is manually approved by the Administrator and has successfully been added to the Organization's database.

Pending Application

These are Users that have completed the Signup Workflow and are awaiting approval to be accepted into the Organization.

Rejected Application

These are Users that did not meet the needs of the Organization and their Application was declined. Users can always be accepted back into the Organization when they are in this state.

✔ Pros of using Manual Approval

- Provides Administrators with more control over who has access to the Organizations.
- Allows for a heavier screening process.

✘ Cons of using Manual Approval

- If not managed properly, Users may become less engaged in a pending state as they wait for the Approval to happen.

✪ Best Practices

- Don't leave applicants in a pending state for too long, it is best to check on applications on a regular cadence.
- If the Organization has a heavy screening process, or if there are specific requirements that need to be met, use Manual Approval.

- The pending applications and rejected applications can also be used as a way to white-list Users for future Opportunities.

Opportunity Level

Recruiting from the Opportunity Level

◈ **What is Recruitment from the Opportunity Level?**

This brings Users into the system in the context of the Opportunity, closing them off from all of the other potential Opportunities happening within the Organization.

✪ **Best Practices**

If the Organization is running one main Opportunity, such as an Event, consider recruiting from the Opportunity Level. This allows Users to not get distracted by anything else that may be occurring within the Organization.

✔ **Pros of using Opportunity Level Recruitment**

- Users typically recognize the brand of the Opportunity and will be able to sign up in context.

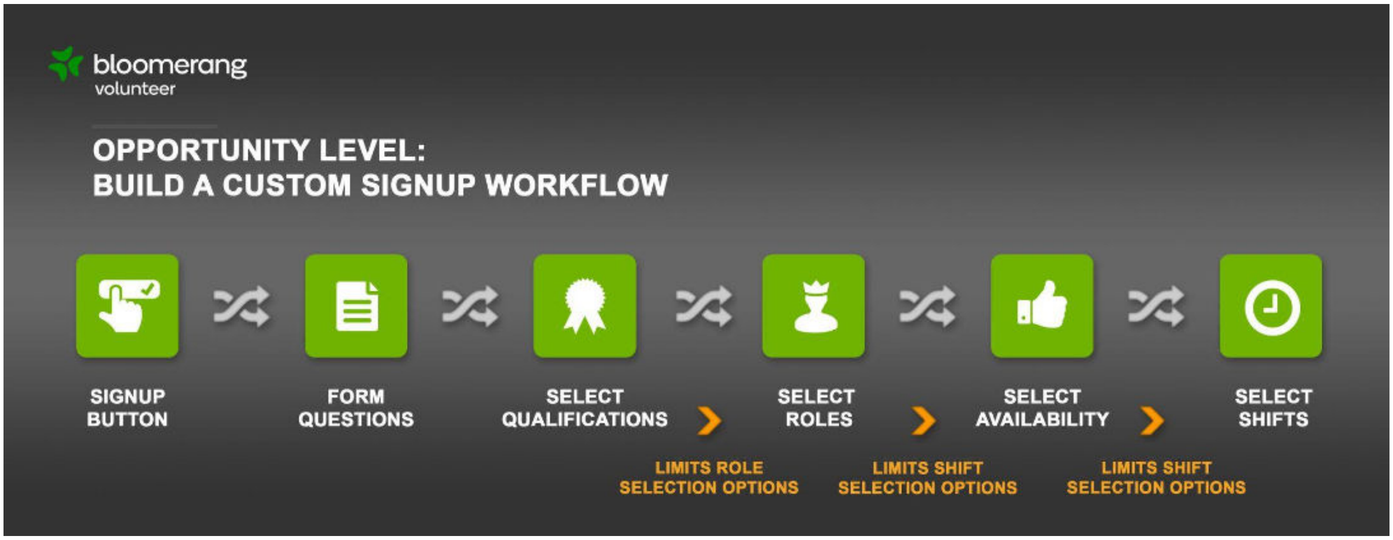
✘ **Cons of using Opportunity Level Recruitment**

- Users will not be able to see other other Opportunities happening within the Organization by entering the system at the Opportunity Level.

- If manual approval is enabled at the Organization Level, only once the User is approved into the Organization can they see Member Only Opportunities.

Building the Signup Workflow

Within each Opportunity, a custom Signup Workflow can be built. This custom workflow will guide Users down a path that provides Administrators with their required information. Six steps can be enabled to tailor the custom signup experience: the Signup Button, Form Questions, Qualifications, Roles, Availability and Shift Selection.



Signup Steps

Signup Button

The Signup Button is the main call-to-action on the Public Page and is considered the first step in the workflow. This button can be turned on or off, and customized to suit the goal of the page. *For Example: "Join", "Apply", "Express Interest", "Register", etc.* When the Signup Button is turned off, Users will not be able to Self-signup to the Opportunity. Users must be manually added to the Opportunity by an Administrator in order to access or complete the rest of the enabled Workflow Steps.

Form Questions

Users will be prompted to complete the Registration Form. Only Enabled questions will be displayed and all required fields must be filled out before the Users can continue down the Workflow.

Group Registration Questions

As part of the Form Questions, Users will be asked if they are Registering as an Individual, if they are joining an existing Group, or if they would like to create a new Group to join.

Qualifications

Users will be prompted to select Public Qualifications.

Roles

Users will be prompted to select Public Roles. If Roles have associated Qualifications, Users will only see Roles for which they are qualified.

⚙ **Basic Settings**

- Minimum Roles: Set the minimum number of Roles Users can sign up for. Staff will not be able to advance in the Signup Workflow until this number is reached.
- Maximum Roles: Set the maximum number of Roles Users can sign up for. Staff will not be able to select more Roles than this value.

Availability

Users will be prompted to select the dates and times they are able to work within the Opportunity. Dates are populated based on the days in the Schedule that have Shifts.

Shifts

Users will be prompted to schedule themselves for Public Shifts. Shifts that have reached the Maximum Staff will be marked as FULL.

⚙ **Basic Settings**

- Do not limit Shift Signup: Users can select as many Shifts as they want.
- Limit Signup by Number of Shifts: Shifts can be limited by day or across the entire Opportunity.
    - Minimum Number of Shifts: Set the minimum number of Shifts Staff can sign up for. Staff must select the minimum number of Shifts before they can advance.
    - Maximum Number of Shifts: Set the maximum number of Shifts Staff can sign up for. Staff will not be able to select more than this value.
- Limit Signup by Number of Hours: Shifts can be limited by day or across the entire Opportunity.
    - Minimum Number of Hours: Set the minimum number of hours Staff can sign up for. Staff must select the minimum number of hours before they can advance.

- Maximum Number of Hours: Set the maximum number of hours Staff can sign up for. Staff will not be able to select more than this value.

Workflow Styles

There are different workflows that can range from a simple one-click signup, to having the Users fill out every step of the process. Within all these variants there are three main workflow styles that are commonly used: Simple Signup, Signup built for Self-Scheduling, or Signup built for Manually Rostering.

The workflow can consist of any combination of the six steps in the Custom Signup Workflow. It will be up to the Administrator to determine which steps are needed to fit the requirements of the Opportunity. Signup steps can be turned on or off at any time during the registration process and can be leveraged to gauge interest levels and the amount of additional promotions required.

❶ Simple Signup Workflow

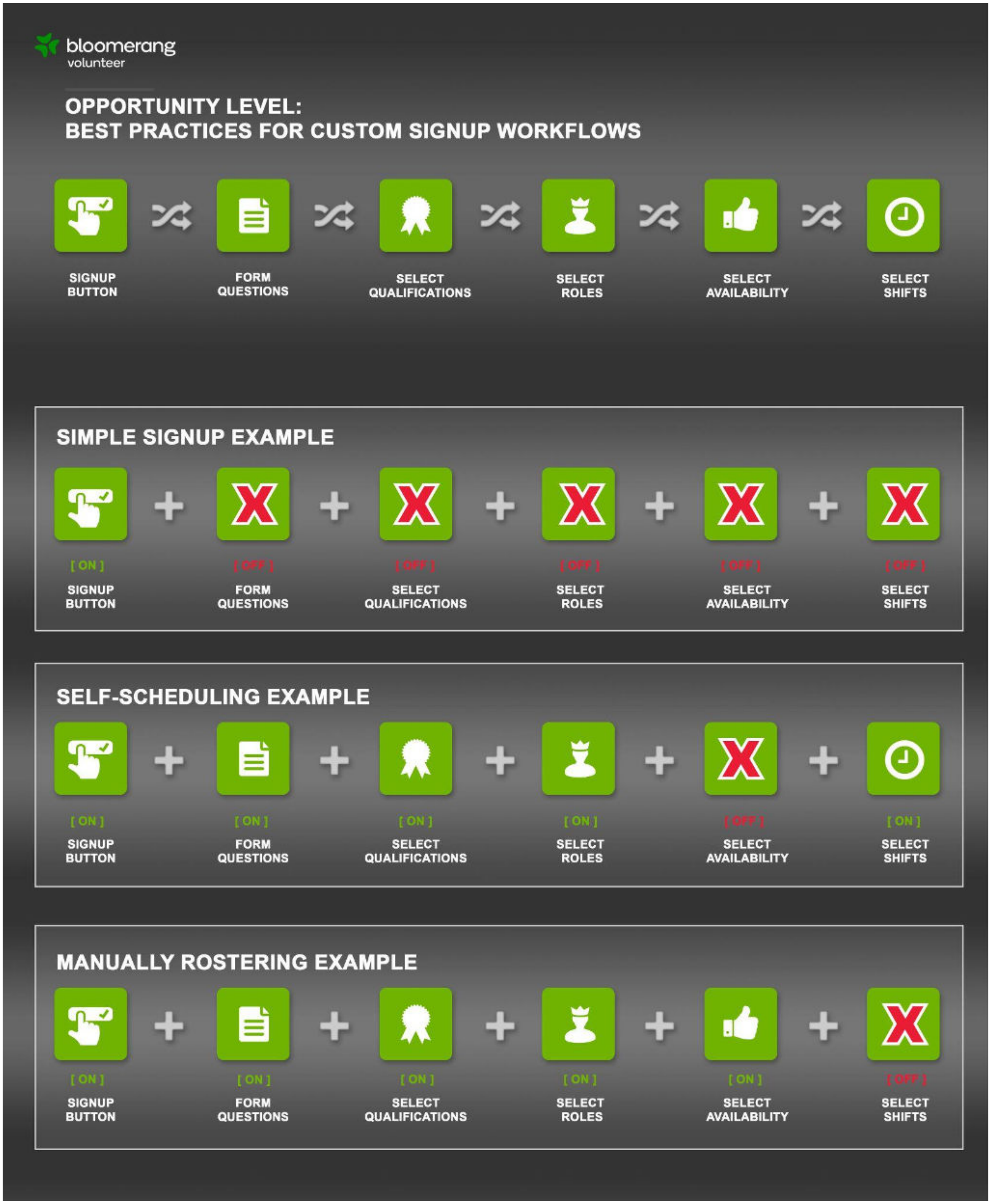
This is when only the Signup Button is enabled and the Users are able to join the Opportunity in one-click. This style of workflow is best used on Opportunities that are very simple and mimic the attributes of a task or Shift *(one date, one start time, one place)*.

❷ Signup Workflow Built for Self-Scheduling

This workflow is used when Users will be selecting their own Shifts. Typically, it will not require the Availability step to be enabled, because the Users will usually select the Shifts they know they are available for. Enabling the Roles and Qualification steps will help ensure that Users will only be presented with the Shifts they are qualified to work.

❸ Signup Built for Manually Rostering

This workflow is used when Administrators will be manually assigning Users to Shifts. All information collected will be used in conjunction with the *Roster Mode™* engine to ensure that Users and Shifts are matched with the best results. Enabling the Roles, Qualifications and Availability step will help gather as much information as possible to make Scheduling decisions a breeze.



bloomerang
volunteer
OPPORTUNITY LEVEL:
BEST PRACTICES FOR CUSTOM SIGNUP WORKFLOWS
SIGNUP BUTTON
FORM QUESTIONS
SELECT QUALIFICATIONS
SELECT ROLES
SELECT AVAILABILITY
SELECT SHIFTS
SIMPLE SIGNUP EXAMPLE
[ON] SIGNUP BUTTON
[OFF] FORM QUESTIONS
[OFF] SELECT QUALIFICATIONS
[OFF] SELECT ROLES
[OFF] SELECT AVAILABILITY
[OFF] SELECT SHIFTS
SELF-SCHEDULING EXAMPLE
[ON] SIGNUP BUTTON
[ON] FORM QUESTIONS
[ON] SELECT QUALIFICATIONS
[ON] SELECT ROLES
[OFF] SELECT AVAILABILITY
[ON] SELECT SHIFTS
MANUALLY ROSTERING EXAMPLE
[ON] SIGNUP BUTTON
[ON] FORM QUESTIONS
[ON] SELECT QUALIFICATIONS
[ON] SELECT ROLES
[ON] SELECT AVAILABILITY
[OFF] SELECT SHIFTS

Chapter 10

Go Live! Enabling the Mobile App

Enabling the Mobile App

LiveMode^{TM}

The Bloomerang Volunteer mobile app is designed for onsite, real-time scenarios, allowing Administrators to fill scheduling gaps, track attendance and to quickly communicate with any desired subset of Users.

◈ **What is *LiveMode^{TM}*?**

LiveMode^{TM} is a setting in the Administrator's interface that can be turned on at any time. When *LiveMode^{TM}* is enabled, Staff and Volunteers are granted access to the details of the Opportunity *(on their mobile devices)* and will be alerted about their upcoming Shifts. All scheduling changes performed by Administrators will automatically send notifications to the affected Users, saving valuable communication time.

◈ **How does the Mobile App work?**

The mobile app can be accessed from any Android or iOS smartphone or tablet. It has two main dashboards depending on a User's Role and permission level. There is the Manager Dashboard and the Staff Dashboard.

Manager Dashboard

This dashboard is used by Administrators, including: Managers, Role Managers, Shift Supervisors, and Checkin Administrators. It provides access to the Staff List, Master Schedule and mass communications. Depending on the permission level, the data and functionality will be limited.

Staff Dashboard

This dashboard is for all Users in the Opportunity that are not in a System Role permission group. It provides access to their personal information and Schedule, along with a means to communicate.

Best Practices

- If running an ongoing Program, it's best to leave the Opportunity in a constant state of 'Live'.
- If running an Event, it is recommended to enable *LiveMode^{TM}* a few days ahead of the Event, allowing Users to look around and try the app before the rush of Event day. It is not recommended that *LiveMode^{TM}* is enabled during the planning

phase, as the Schedule change notifications can overwhelm Users when final prep is being done on the Schedule leading up to the Event.

Chapter 11

Attendance: Establishing a Check-In Process and Logging Hours

Attendance Tracking

Bloomerang Volunteer offers two methods to track attendance: General Check-in or Shift Check-in.

❶ General Check-in

What is General Check-in?

The General Check-in feature is used to track arrival and departure times. General Check-in is not matched against Scheduled Shifts, and should only be used as a high-level summary to track ins and outs, and the total hours between.

Basic Settings

- Self Check-in: Allow Staff to check themselves into their Opportunity.

✔ Pros of using General Check-in

- It provides a high-level look at Opportunity attendance.
- Easiest way to track attendance

✘ Cons of using General Check-in

- It is not matched with the schedule, so it does not track in-depth activity against a Shift.

Best Practices

- For general arrival and departure times that do not map to Shifts choose General Check-in

❷ Shift Check-in

What is Shift Check-in?

The Shift Check-in feature is used to track hours worked on a shift-by-shift basis. Shift Check-in is matched against Scheduled Shifts and can be used to track overtime hours, lates, and no-shows.

⚙ Basic Settings

- Self Check-in: Allow Staff to check themselves into their Shifts.
- Automatic Shift Clock-Out: Set a retroactive clock-out that will be recorded 4 hours after the end-time of a Shift if there is no recorded clock-out for the User. The purpose of 4 hours is to leave enough time for any late Check-outs to occur.

✔ Pros of using Shift Check-in

- Provides Managers with a way to track attendance to specific Shift times.
- Provides an easy way to track if Users are late to Shifts or are working overtime.

✘ Cons of using Shift Check-in

- If no Schedule is created, Shift-check-in cannot be used.

✪ Best Practices

- Users tend to forget to Check-out of their Shifts, enabling the Automatic Shift Clock-out feature will save a tremendous amount of administrative time when calculating hours worked.

Designing a Solid Check-in Process

Bloomerang Volunteer offers a variety of ways and methods that Users can be checked-in. It is important to choose a method that best suits the operations of the Opportunity. Users can be Checked-in in three ways: by a Manager, by themselves, or by a “Check-in Administrator”.

➊ Manager based Check-in

◈ What is Manager based Check-in?

A Manager based Check-in is when an Administrator performs the Check-in action on behalf of the User. This action can be carried out by Managers, Role Managers and Shift Supervisors.

◈ How does it work?

A Manager based Check-in can happen in two ways: through the Mobile App, or through the Web Application.

Mobile App

The mobile app is downloaded onto the Manager’s personal device, where they can log in and record check-in/out times against a specific User.

Web App

Once a Manager log’s into the system through the web browser, there are several areas in the Administrator's interface that the Check-in action can be carried out.

✪ Typical Set up

Typically, Manager-based Check-in is used for Opportunities that require heavier monitoring over the attendance of Staff and Volunteers, especially on the Shift level.

✔ Pros of using Manager based Check-in

- Managers can provide a more reliable, accurate and truthful depiction of check-in/out times.
- Staff and Volunteers don’t need to be trained on learning the Check-in interface and process.

✘ Cons of using Manager based Check-in

- If the Opportunity is happening over a large location, Users might have a hard time tracking down their Managers to be Checked-in.

✪ Best Practices

- Always train Managers on how to perform the action. Bloomerang Volunteer has special training videos and knowledgebase articles to assist with this.

- There are multiple areas for Administrators to perform the Check-in action. Each area is designed to be relevant to the context that the Administrator is currently in.

- Save time by actioning in bulk! The Web and Mobile app offer bulk Check-in/out capabilities.

❷ Self Check-in

What is Self Check-in?

Self Check-in is when the Staff and Volunteers are permitted to track their own attendance by performing the action of checking themselves in.

How does it work?

Self Check-in can happen in two ways: through the mobile app, or through Bloomerang Volunteer's Kiosk.

Mobile App

The mobile app is downloaded onto the User's personal device, where they can log in and track their own Check-in/out times.

Bloomerang Volunteer's Kiosk

The Kiosk is a browser-based application that can be set up on a tablet or computer as a generic station for volunteers to track their own Check-in/out times.

✪ Typical Set up

Mobile App

Typically, the Mobile app is leveraged with ongoing Opportunities or Programs that do not have a designated Check-in station or area.

Kiosk

Typically, the Kiosk is leveraged in an Event setting, where Staff and Volunteers are required to stop into a special station before entering the Event. This could also be used for ongoing Programs that have a static Check-in station on site.

✔ Pros of using Self Check-in

Mobile App

- Users can Check-in 'on-the-fly' from any location.
- Users have more control over the hours being submitted.

Kiosk

- Staff and Volunteers don't have to download anything on their personal devices.
- The kiosk is typically situated in the same location, so Users will always know where to go to Check-in.
- The interface is designed for non-tech savvy Users and is very simple to use, only requiring a couple of button clicks to Check-in.

✘ Cons of using Self Check-in

Mobile App

- If the User demographic is not tech savvy, self Check-in could be seen as a challenge.
- The Bloomerang Volunteer Mobile app download is required to perform this action.
- Administrators must rely on Users to remember to Check-in/out.

Kiosk

- Typically, the Kiosk Station is always located in the same areas, making Check-in 'on-the-fly' from different locations a challenge.

Best Practices

- Allow self check-in if Users can be trusted to carry out the process
- Whether the Mobile App, or the Kiosk is being used, always train Users on how to perform the action. Bloomerang Volunteer has special training videos and knowledgebase articles to assist with this.

3 Check-in Administrator

What is a Check-in Administrator?

This is a special Bloomerang Volunteer Role designed for attendance tracking purposes.

What is the purpose of this Role?

This Role comes into play when Staff are not granted the permission to check themselves in and out, or, if the Managers are unable/too busy to perform the action.

How does it work?

Depending on the attendance settings, the Check-in Administrators are able to check Staff in and out. In order for Check-in Administrators to have access to these permissions, they must be added to the Role.

Basic Settings / Permissions

The Check-in Administrator Role has permissions solely on the mobile app and comes into play when *LiveMode*™ is enabled. Check-in Administrators have access to the full Staff List, which includes contact information and personal Schedules.

Typical Set up

Typically, the Check-in Administrator Role is leveraged in an Event setting, where Staff and Volunteers are required to stop into a special station before entering the Event.

Best Practices

- A trusted Staff or Volunteer typically operates this Role, not an Administrator or Manager.

Hours Tracking and Logging

Bloomerang Volunteer offers two methods for tracking hours: through an export of automated reports, or, through manually logging hours.

❶ Hours Worked: Automated Reports

What are the Automated Reports?

These are reports that Bloomerang Volunteer generates based on Check-in data. Depending on the Attendance tracking settings, these reports can be general overviews of in and out times, or detailed Shift reports that compare the hours Checked-in vs. the hours scheduled.

How to Generate the Reports?

All Attendance based reports are available at both the Organization Level and Opportunity Level. Managers can download these reports as a .CSV file to get a summary of the activity. These reports can then be edited in an application such as Excel. This data can be used to evaluate the staff/volunteers, or report on hours for payroll, grants, etc.

Specific Reports

The following is a list of available reports that Bloomerang Volunteer generates:

General Check-in / Check-out Log

This log includes timestamps of General Check-in activity, who took the action, and the calculated hours between each Check-in/out. Please Note: General Check-in/out does not take Scheduled Shifts into consideration.

Shift Check-in / Check-out Log

This log includes timestamps of Shift Check-in activity, who took the action, and the calculated hours between each Shift Check-in/out.

Hours Worked Overview

This report is a summary of the number of hours checked-in per User, across all Scheduled Shifts.

Hours Worked Overview For Groups

This report is a summary of the number of hours checked-in per Group, across all Scheduled Shifts.

Detailed Shifts / Hours Worked

This report is used to track the number of hours checked-in per User, per Shift. Only Scheduled Staff will appear in this report.

❷ Hours Worked: Manual Logging

◈ What is manually logging hours?

Administrators can manually add in attendance logs for General Check-in and Shift based Check-in. This is extremely useful if the Opportunity is taking place in an area that has limited connectivity and the Mobile App is not an option for this function.

Typical Scenario

Manual logging typically happens by an Administrator after the Shift or Opportunity takes place. *For example, if some attendance times were recorded on paper, or if there are any connectivity issues at the time of entry*.

◈ How do you manually log hours?

General Check-in

Administrators will be prompted to fill in the date, in-time and out-time. This can be done on the Opportunity's Staff List.

Shift Check-in

Administrators must log the hours directly on a User's Scheduled Shift. There are several spots in the interface where this can be done, including the Staff Profile and Staff Schedule View. Administrators will be prompted to fill in the date, in-time and out-time.

Chapter 12

Helpful Tips: Managing Staff, Increase Engagement and Prevent No-Shows

Helpful Tips

Managing Staff, Increase Engagement and Preventing No-Shows

Keeping Staff and Volunteers engaged with the Organization, the Opportunity and their Role can help create a more committed base. There are several tools available within Bloomerang Volunteer that can help ensure everyone on the team is kept in the loop and changes are communicated effectively, including: Shift Reminders, Send Personal Schedules, Shift Confirmations, “Remove Me” functionality, and Broadcast Messages.

➊ Shift and Schedule Reminders

◈ What are Shift and Schedule Reminders

Shift and Schedule reminders are designed to call attention to Users that have an upcoming commitment and will help mitigate the classic excuse of *“I forgot!”*.

The following are features that can help:

Manually Send Personal Schedule

This is a very quick and easy way for Managers to send Users their personal schedule via email.

Automatically Send Personal Schedule

Pre-schedule as many reminders as necessary. Set the date and time for personal Schedules to be sent via email. This email will go out to all Users that are Scheduled in at least one Shift within an Opportunity. Staff who have pending Shift Confirmations will also be prompted to respond.

✪ Best Practices

Determine date(s) that personal schedules will be sent out during the initial setup of the Opportunity. This will ensure that every Scheduled User receives a personal Schedule email prior to the Opportunity going live.

Automated System Reminders

These are reminders that Bloomerang Volunteer automatically sends to Users ahead of their Shift. Users can customize the reminders to be 15 minutes before the Shift starts, up to two hours before the Shift starts.

✔ Pros of using Shift and Schedule Reminders

- Sending out a reminder will help promote engagement leading up to an Opportunity. It is also a good tool to ensure that Users are aware of their Schedule in advance.

✘ Cons of using Shift and Schedule Reminders

- The reminder is useful but does not require the User to confirm the Shifts they are signed up for.

❷ Shift Confirmations

◈ What are Shift Confirmation Requests?

These are special requests an Administrator can send to Users to help verify that they are still able to commit to the Shift, reducing the amount of no-shows.

◈ How do Shift Confirmation Requests Work?

Administrators are able to request Shift Confirmation at the Opportunity Level, or across multiple Opportunities at the Organization Level. When an Administrator requests a Confirmation, it will send all scheduled Users an email. When the Users receive the Confirmation Request, they will be prompted to either accept or decline the Shift. If a User declines a shift they will be prompted to provide a reason as to why they no longer attend that Shift. Shifts can be sent in bulk and will appear in a single email and can be Confirmed/Declined by the Users in bulk.

⚙ Basic Settings

- Automatically Remove Staff From Declined Shifts: Automatically remove Staff from a Shift when they decline the Confirmation Request. If notifications for declined Shifts are enabled, Managers will also receive a notification that the User was removed from declined Shifts. Shift Confirmations are only sent to a User when they are Scheduled in a Shift.

- Remove Notification: Managers can choose how they wish to be notified when a Shift is either confirmed or declined.

✔ Pros of using Confirmation Requests

Sending out Shift Confirmations allows the Opportunity Manager to easily track whether volunteers will be attending the shifts they signed up for.

✪ Best Practices

- Sending out Shift Confirmations ahead of time will not only remind Users of their upcoming Shifts, but will also get a confirmation that they will be attending.
- Enabling notifications means that Administrators can easily identify Shifts that will need attention due to declines.
- Use Filters to easily remove Users from Shifts after reviewing their reasons for not attending.

❸ "Remove Me" Functionality

◈ What is the 'Remove Me" Functionality?

This functionality allows Users to remove themselves from anything they have been scheduled in, such as a Shift or an Opportunity. This can help eliminate back-and-forth communication between the Scheduler and the User.

Remove from Shift

Allow Staff to remove themselves from a Shift on the Web and Mobile App.

Remove from Opportunity

Allow Staff to remove themselves from the Opportunity on the Web and Mobile App.

✔ Pros of allowing Users to Remove Themselves

- This gives more scheduling flexibility to the Users.

✘ Cons of allowing Users to Remove Themselves

- This offers less control over the Schedule for the Administrators.
- Users can easily bow out of Volunteering on the day if the weather is bad or they don't feel like coming.

✪ Best Practices

- If allowing Staff to remove themselves, be sure to enable the Manager Notifications to keep track of problem areas.

- Allow Users to Remove themselves leading up to the Schedule, however, a few days prior to going Live, it may be best to no longer allow removals. This will help ensure mass drop-outs/scheduling gaps don't happen the day before it starts.

4 Sending Messages

◈ Ways to Send Messages

Communication is a key to keeping Users engaged and assuring them that regular operations are continuing. From the Web applications, Administrators are able to send Users messages primarily in two ways: as an email message or, as a broadcast to the mobile application.

Emails

Emails can be sent to individual Users, or in Bulk and are generally used leading up to the Schedule, or for longer communication strings.

Broadcasts

Broadcasts are shorter messages that can be sent to individual Users, or in Bulk and are generally used for real-time purposes on the day of the Opportunity.

◈ Why Broadcast Messages?

Broadcasting to the Mobile App is very beneficial in letting Users know of any Schedule changes, Schedule gaps and shortages, updates on how operations are running and any emergency messages that need to be sent.

◈ How do Broadcasts work?

Once the *Live Mode*™ has been enabled for the Mobile App, Broadcasting capabilities will be enabled. The Broadcast communication system works slightly differently than the Email system.

The Broadcast system has a 3 tiered delivery method to ensure that all Users receive the message, this is also known as the "*Fail Proof Communication Method*". If Users have downloaded the mobile app, they will receive the message as an in-app notification. If Users are not logged in to the mobile app, or have not downloaded it, they will receive the message as a SMS text message. If Users have not provided their mobile number the message will send as an email.

✔ Pros of using Messages

- Properly sending out messages can help keep operations running smoothly and the Users engaged.

✘ Cons of using Messages

- Broadcast messages are designed to be shorter and have a character limit. Messages that are longer than the character limit will have to be broken out and sent separately.

✪ Best Practices when Sending Messages

- Using both types of messages will help fill out any shortages in the Schedule faster.

- When running an ongoing program, it is good to reach out on a regular or weekly basis.

- When running an event, send out daily/hourly updates to keep staff and volunteers aware of what is happening, or to give positive encouragement.

- Use Broadcast messages to communicate any real-time issues or needs during operations.

- When sending an email, be sure to include a reply address in the body of the email, and a signature at the bottom so receivers know who the message is coming from.

♦Tips and Tricks

- In the Form Questions, be sure to use the Template Question that asks Users for their mobile phone number. This will ensure that Users will receive Broadcast messages on their mobile devices even if they have not downloaded the mobile app.

Bloomerang Volunteer Training for Staff and Volunteers

Web Application

Making it easy for Staff and Volunteers to find the answers they need is important to keep them coming back into the system. Bloomerang Volunteer has a variety of resources that will make it easier for them to navigate the system.

Knowledge Base for Staff and Volunteers

https://knowledge.initlive.com

Mobile Application

Providing Staff and Volunteers with some training and resources for the Mobile App will ensure that onsite operations run smoothly. Similar to the Web Application, Staff and Volunteers have access to several resources that will help them navigate the Mobile App.

Mobile App Training Video

https://initlive.learnworlds.com/course/adminmobileapp

Link to download Bloomerang Volunteer on the Android PlayStore

https://play.google.com/store/apps/details?id=com.initliveandhl=en

Link to download Bloomerang Volunteer on the iOS App Store

https://itunes.apple.com/app/initlive-event-staff-management/id930982722?mt=8andign-mpt=uo%3D2

Glossary of Terms

Account Level

Administrators - Anyone that has additional permission levels within Bloomerang Volunteer. Administrators include; Organization Managers, Opportunity Managers, Role Managers and Shift Supervisors.

Users - Anyone that has not been granted additional permissions within Bloomerang Volunteer. This is typically Staff and Volunteers that are a part of an Organization and/or Opportunity.

Claimed Account - When User has logged-in and set a password for their account.

Unclaimed Account - When a User is imported into the system by a Manager and the User has not yet logged in and set a password for their account.

Organization Level

Organization - An Organization is the company, association, or committee that is responsible for an Event or Opportunity.

Organization Manager - An Organization Manager can view and manage all Opportunities and Staff within the Organization.

Organization Public Page - The Organization Public Page is the main landing page for the Organization within Bloomerang Volunteer. Customize this page by displaying Signup Opportunities, uploading a Logo and Cover Photo, as well as a Description.

Organization Database - The Organization Database holds all of the Users that are members of the Organization.

Opportunity Level

Opportunity Public Page - The Opportunity Public Page is the main landing page for the Opportunity within Bloomerang Volunteer. Customize this page by displaying available Shifts, uploading a Logo and Cover Photo, as well as a Description.

Opportunity - A Bloomerang Volunteer Opportunity can be used for a variety of implementations. Due to the flexible nature of Opportunities, Managers can set it up as an Event with a defined start and end date, an ongoing Program, a complete Schedule consisting of Roles and Shifts, or even just a registration form, community page, or an update of FAQ page.

Opportunity Minimum Staff - A General Opportunity Setting that Managers can set for the minimum Staff required in the Opportunity.

Opportunity Maximum Staff - A General Opportunity Setting that Managers can set for the maximum number of Staff needed in the Opportunity. Once the maximum is reached, the Opportunity will be marked as 'Full'.

Hidden Opportunity Listing - Hidden Opportunities will not be listed as an Opportunity for Organization Members to register for. Users will need to be invited to the Opportunity from the Staff List or the Registration Signup Link.

All Members Opportunity Listing - The Opportunity will appear as a Signup Opportunity to all members of the Organization.

Custom Opportunity Listing - The Opportunity is only visible as a Signup Opportunity to Organization Members that have been assigned certain Organization level Qualifications.

Public Opportunity Listing - The Opportunity will appear visible on the Organization's Public Page to members and non-members.

Form Questions - The custom questions created by an Administrator for Users to complete during recruitment, either at an Opportunity or Organization Level.

Available Positions - Available Positions let Users know the state of the Opportunity and how Full it is. There are three types of available positions: Open Spots, Open Shifts, or Staff Needed.

> **Open Spots** - The total number of signup spots that are available for public signup.
>
> **Open Shifts** - The total number of Scheduled Roles that are available for public signup.
>
> **Staff Needed** - The remaining total of Users required to meet the Maximum Staff setting.

Signup Button- The signup button *(or Call-to-Action button)*, is the main call-to-action on the Public Pages; this is the first step Users will select when registering for an Opportunity or the Organization. Managers can customize the text that appears on this button.

Disabled Button Text - The text that will appear on the hover over when the Signup Button is turned off. Managers can customize the text to provide Users with information as to what the status of the signup is.

Schedule Style - The type of Schedule the Opportunity will be using *(For example, Weekly, Ongoing, Flexible, No schedule, etc.)*.

Time Commitment - The time commitment, length, frequency or specific hours required for the Opportunity.

Self-Signup Settings - Determine the steps in the Registration process, and what step Users will have to complete and self-select *(For example, Form Questions, Qualifications, Roles, and Shifts)*.

Schedule Confirmations - Confirmation requests that are sent out to all Scheduled Staff to verify that they will be attending their Shift.

Availability - The time and dates of when Users are able to work and not able to work.

> **General Availability** - Collected at the Account and Organization Level, this type of Availability is matched against the days of the week *(For Example, Wednesdays and Thursdays)*.
>
> **Date Specific Availability** - Collected at the Opportunity Level, this type of Availability is matched against specific calendar dates *(For example, July 1st, 2020).*

Private Opportunity Details - These are details and contact information that will only be available to Users once they are a part of an Opportunity.

Internal Notes - Internal Notes are notes that are added to a Staff Profile outlining their performance or participation in a particular Opportunity. These notes will not be visible to the Users themselves, but can be viewed by Opportunity and Organization Managers.

Star Rating - Star Ratings can be applied to Users as a way to measure performance and their overall value to the Organization or Opportunity. Star Ratings will not be visible to the Users themselves, but can be viewed by Opportunity and Organization Managers.

Roles and Qualifications

Role - A Role is the job or task required in the Opportunity.

> **Public Roles** - A Public Role is listed in the Signup Workflow and can be self-selected by Qualified Users.
>
> **Private Roles** - A Private Role is hidden from the Signup Workflow and cannot be self- selected by Users, they must be appointed by an Administrator.

System Role - Special Roles created by Bloomerang Volunteer to grant and restrict access to certain areas within the Opportunity. System Roles include: Opportunity Manager, Role Manager, Shift Supervisor and Check-in Administrator.

Custom Role - A Role created by the Administrator that has the basic capabilities of a User.

Opportunity Manager - This System Role provides Users with full administrative access to an Opportunity, allowing them to update and edit all the components of an Opportunity.

Role Manager - A permission granted to a User that provides full administrative access over any Role(s) they are associated with.

Check-in Administrator - The Check-in Administrator is a System Role that has the ability to check staff in and out of the Opportunity, and has access to the full staff list. This Role comes into play for Opportunities where volunteers are not granted the permission to check themselves in and out.

Shift Supervisor - The Shift Supervisor is a System Role that comes into play once the Opportunity has gone Live, and has permissions solely on the mobile app. Shift Supervisors can check staff in and out of their shifts, send Broadcasts, along with having access to staff contact information.

Qualifications - A Qualification is a skill set, attribute, or certification associated with a User.

> **Hidden Qualification** - A Hidden Qualification is hidden from the Signup Workflow and hidden from the User it is assigned to. Users will not be able to view the Qualification under any circumstance. Public Roles associated with the Qualification will only be accessible to Users assigned the Hidden Qualification.
>
> **Private Qualification** - A Private Qualification is not visible in the Signup workflow and cannot be self-selected by Users, they must be appointed by an Administrator. Public Roles associated with the Qualification will only be accessible to Users assigned the Private Qualification.
>
> **Public Qualification** - A Public Qualification is visible in the Signup Workflow and can be self-selected by Users, or they can optionally be appointed by an Administrator. Public Roles associated with the Qualification will be accessible to all Users if they selected the Qualification.
>
> **Organization Qualification** - An Organization Qualification is created and stored at the Organization Level *(the highest level in the system)* and can be transferred down to the Opportunity Level.

Opportunity Qualification - An Opportunity Qualification is created and stored at the Opportunity Level and cannot be transferred up to the Organization Level.

Groups

Group Registration - The ability for a group of people to sign up to an Opportunity as one unit.

Group Leader - A Group Leader is the person who originally created and registered the Group, or has been assigned by an Administrator. This person is responsible for updating the Opportunity Manager with any changes or additional information about the Group.

Account-Based Group - These are Groups that are made up of existing Bloomerang Volunteer User Accounts *(both claimed accounts or unclaimed accounts)*.

Number-Based Group - These are Groups that are based on an arbitrary number of people being committed to the Opportunity. This number is not associated with any existing Users or Accounts in Bloomerang Volunteer.

Email Based Group - These are Groups using the email + protocol which allows for multiple Usernames to be created using the same email address.

Schedule

Shift / Scheduled Shift - A Shift is a block of work that has a defined place, date, start time and end time.

Scheduled Role - A Role that has been assigned into a Shift.

Scheduled Staff - A User that has been assigned into a Scheduled Role within a Shift.

Scheduled Shifts View - This view of the Schedule is where the creation of the Schedule will occur. This is the main view for building Shifts.

Scheduled Roles View - This view of the Schedule allows Administrators to view Shifts broken down by Scheduled Roles to monitor the overall health of the Schedule.

Scheduled Staff View - This view of the Schedule provides Administrators visibility over all Users Scheduled in Shifts. This view is used to manage Check-ins, Confirmations and Scheduling Conflicts.

List View - This is a view of the Schedule presented in a data grid with columns and rows.

Calendar View - This is a view of the Scheduled mapped against a day, week or month view of the calendar.

Scheduled Role Signup Visibility - A setting that will determine whether or not the Scheduled Role will display in the Signup Workflow.

> **Public -** Visible in the Signup Workflow for Users to self-select.
>
> **Private -** Hidden from the Signup Workflow, Users cannot self-select and must be appointed by an Administrator.

Scheduled Role Signup Limit - A setting that will determine the amount of Users required in the Shift in order for it to be successful.

> **Minimum Staff Required -** the minimum amount of Staff that need to be Scheduled in the Shift. Any metric below the Minimum Required will be flagged as a Schedule Problem.
>
> **Signup Limit -** the Maximum number of Staff that can be Scheduled in the Shift. Shifts will be marked as 'Full' once the Maximum is reached.

Place - This is where both a Venue and Location are Scheduled in a Shift.

> **Venue -** A Venue is the designated area in which the Opportunity will take place. There are no limits to the number of Venues per Opportunity. This means Managers can create as many as needed to suit the needs of the Opportunity.
>
> **Location -** Locations exist within Venues. They are specific areas of the Venue where staff will be scheduled. Managers can create multiple Locations for each Venue

***LiveMode™*/ Go Live! -** This setting enables the free Bloomerang Volunteer smartphone app on iOS and Android. Once the Opportunity is Live, Schedule changes and real-time notifications will be sent to affected Users.

***RosterMode™* -** Rostering Tool that allows Administrators to quickly assign Users into Shifts based on collected data such as Qualifications, Roles and Availability.

> **Staff List *RosterMode*™-** This Rostering engine finds the best matched Shifts for the selected Staff.
>
> > **Best Matched Shifts -** Shifts best suited for the Selected Staff based on their Roles, Qualifications and if enabled, Shift Conflicts and Availability.

Shifts with Matching Roles - Shifts currently assigned matching Roles that the selected Staff are assigned.

Shifts with Matching Qualifications - Shifts currently assigned matching Qualifications that the selected Staff are assigned.

Schedule *RosterMode*™- This Rostering engine finds the best matched Staff for the selected Shifts.

Best Matched Shifts - Staff best suited for the Selected Shifts based on their Roles, Qualifications and if enabled, Shift Conflicts and Availability.

Shifts with Matching Roles - Staff currently assigned to all of the selected Roles.

Shifts with Matching Qualifications - Staff that are assigned all of the required Qualifications.