One Step Volunteer Attendance Reporting

While you can report attendance via the connections grid in each occurrence record - but One Step Volunteer Attendance Reporting allows you to report attendance for ANY occurrence where attendance is due, all from one place. It saves a lot of jumping from record to record and makes reporting attendance quick and easy!!!

Why should you keep attendance reporting up-to-date? It updates your volunteer's records and history so they can have an accurate record of their engagement with you - and your reports of volunteer engagement will have meaningful information! You'll know exactly how many hours each volunteer has contributed, and how much impact each project has.

How to access One Step Volunteer Attendance Reporting

In HOC Lightning - One Step Attendance Reporting can be found on the utility bar on the bottom of every page. Clicking on this object opens a pop-up with the One Step Attendance Reporting so that's its easily accessible. In many cases, its also placed as a section on your Lightning Home Page so you see it the moment you log in.

In Salesforce Classic: On the left sidebar, you'll see a widget named "Report Volunteer Attendance" Click on the link "One Step Volunteer Attendance Reporting" to launch the new one-step attendance reporting page.

The One Step Reporting Page

By default, all past connections in confirmed / please verify status will appear. If you've not been regularly reporting attendance, there may be quite a few - but with this feature you'll be able to quickly catch up on any attendance reporting for your volunteers.

Features:

1. Use search filters to narrow the connections shown. You can search for all the connections for a contact, or all the connections for a Volunteer Opportunity. (*Note: the * character isn't used for search here. If you put in Valerie for a contact name, you'll get anyone with the name Valerie. If you type in 12th for Volunteer Opportunity Name - you'll get any opportunity with the word 12th in it.)*

2. Select one or more check-boxes to select connections and then 3) click on Mark as attended or Mark as Not Attended.   The connections will be updated and removed from the list of volunteer attendance awaiting verification.   (If no search results show up - then ALL your connections are verified!)

3. After selected the connections - click either "Mark as Attended" or "Mark as Not Attended" to report their attendance. The hours will automatically be populated based on the start time and end time of the connection.

4. Click the top box to select all the connections currently visible on the page.

5. You can choose to display 10, 25, 50 or 100 connections at a time. (Bottom of page). No more than 100 connections can be updated at one time.

Connections can be edited if desired before submitting as attended or not attended:

If you wish to change the start time or end time of a connection, or just to give 'extra hours' because a volunteer stayed longer than the scheduled time, you can do so by clicking on that field and editing it. You can also add 'guest volunteers' by clicking on that field.

Make all your changes BEFORE marking the volunteer as attended or not attended because the record will be removed from the form once attendance has been reported. (Don't worry if you make a mistake - you can always go to the connection itself in its occurrence and update the record AFTER its been removed from the one step reporting grid.)

After editing a record, you will need to click on the SAVE button, before you can report them as attended or not attended:

See this example where we are adding two guests, and are going to credit the volunteer with 5.5 (instead of 5 hours)

VolunteerAttendanceReporting

Volunteer Attendance   Save Changes   Cancel

Contact Name   Volunteer Opportunity Name

                                                    Search   Reset

	Connection	Volunteer Opportunity ▼	Occurrence	Contact	Team	# of Guest	Start Time	End Time	Hour	Guest	Feedba
☐	CO-000257	Ales for Alzheimer's	OC-000981	Jack Parr		2 ↺	6/3/2018 8:00 AM	6/3/2018 1:00 PM	5.5 ↺	0.00	☆ ☆
☐	CO-000255	Ales for Alzheimer's	OC-000949	Violet Parr		0	4/15/2018 8:00 AM	4/15/2018 3:00 PM	0.00	0.00	☆ ☆
☐	CO-000256	Ales for Alzheimer's	OC-000965	Dashiell Parr		0	5/3/2018 8:00 AM	5/3/2018 10:00 AM	0.00	0.00	☆ ☆