

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.

VolunteerAttendanceReporting

Contact Name

Volunteer Opportunity Name

Search

Reset

<input type="checkbox"/>	Connection	Volunteer Opportunity ▼	Occurrence	Contact	Team	# of Guest	Start Time	End Time	Hour	Guest	Feedback
<input type="checkbox"/>	CO-000257	Ales for Alzheimer's	OC-000981	Jack Parr		0	6/3/2018 8:00 AM	6/3/2018 1:00 PM	0.00	0.00	☆☆☆☆☆
<input type="checkbox"/>	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	☆☆☆☆☆
<input type="checkbox"/>	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	☆☆☆☆☆
<input type="checkbox"/>	CO-000318	Are you interested? (D&T)	OC-001161	Jonathan Smith		0	4/27/2018 7:00 PM	4/27/2018 9:00 PM	0.00	0.00	☆☆☆☆☆
<input type="checkbox"/>	CO-000319	Are you interested? (D&T)	OC-001161	Happy Hogan		0	4/27/2018 7:00 PM	4/27/2018 9:00 PM	0.00	0.00	☆☆☆☆☆
<input type="checkbox"/>	CO-000328	Board Members Needed (ISO EIO)	OC-001166	Lenny Leader		0	6/14/2018 9:00 AM	6/14/2018 10:00 AM	0.00	0.00	☆☆☆☆☆
<input type="checkbox"/>	CO-000344	Clerical Help Needed (EIO - with schedule)	OC-001175	Angie Trout		0	8/24/2018 9:00 AM	8/24/2018 9:00 PM	0.00	0.00	☆☆☆☆☆
<input type="checkbox"/>	CO-000347	Clerical Help Needed (EIO - with schedule)	OC-001175	Angie Trout		0	9/14/2018 9:00 AM	9/14/2018 9:00 PM	0.00	0.00	☆☆☆☆☆

Create Volunteer Opportunity

One Step Attendance Reporting

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Import Connections

Import Team Members

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.

Volunteer Attendance											
Contact Name		Volunteer Opportunity Name		Search							
Connection		Volunteer Opportunity		Occurrence	Contact	Team	# of Guest	Start Time	End Time	Hour	Guest
<input checked="" type="checkbox"/>	CO-025867	* Revitalization at Vancouver Water Center		OC-018454	Tim Greseth		0	4/25/2009 12:00 PM	4/25/2009 3:00 PM	0.00	0.00
<input type="checkbox"/>	CO-025869	* Revitalization at Vancouver Water Center		OC-018454	Kendall Hanson		0	4/25/2009 12:00 PM	4/25/2009 3:00 PM	0.00	0.00
<input type="checkbox"/>	CO-025868	* Revitalization at Vancouver Water Center		OC-018454	Mika Davies		2	4/25/2009 12:00 PM	4/25/2009 3:00 PM	0.00	0.00
<input type="checkbox"/>	CO-061931	12th Annual African American Health Coalition Wellness Village		OC-009841	VERONICA DUDLEY		0	6/27/2012 11:00 AM	6/27/2013 3:00 PM	0.00	0.00
<input type="checkbox"/>	CO-061938	12th Annual African American Health Coalition Wellness Village		OC-009841	BichPhuong Nguyen		0	6/27/2012 11:00 AM	6/27/2013 3:00 PM	0.00	0.00
<input type="checkbox"/>	CO-061937	12th Annual African American Health Coalition Wellness Village		OC-009841	Justine Lightner		0	6/27/2012 11:00 AM	6/27/2013 3:00 PM	0.00	0.00
<input type="checkbox"/>	CO-061936	12th Annual African American Health Coalition Wellness Village		OC-009841	Kimmy Kunkle		0	6/27/2012 11:00 AM	6/27/2013 3:00 PM	0.00	0.00
<input type="checkbox"/>	CO-061934	12th Annual African American Health Coalition Wellness Village		OC-009841	Gina Hicks		0	6/27/2012 11:00 AM	6/27/2013 3:00 PM	0.00	0.00
<input type="checkbox"/>	CO-061932	12th Annual African American Health Coalition Wellness Village		OC-009841	Valerie Einerson		0	6/27/2012 11:00 AM	6/27/2013 3:00 PM	0.00	0.00
<input type="checkbox"/>	CO-060163	16th Annual National Conference on Child Abuse & Neglect		OC-010928	Nawwal Moustafa		0	1/27/2007 3:00 AM	4/22/2007 2:59 AM	0.00	0.00
<input type="checkbox"/>	CO-050479	16th Annual National Conference on Child Abuse & Neglect		OC-010928	Sunny Zobel		0	1/27/2007 3:00 AM	4/22/2007 2:59 AM	0.00	0.00
<input type="checkbox"/>	CO-050478	16th Annual National Conference on Child Abuse & Neglect		OC-010928	Janis Wallace		0	1/27/2007 3:00 AM	4/22/2007 2:59 AM	0.00	0.00
<input type="checkbox"/>	CO-050475	16th Annual National Conference on Child Abuse & Neglect		OC-010928	Elle Ross		0	1/27/2007 3:00 AM	4/22/2007 2:59 AM	0.00	0.00
<input type="checkbox"/>	CO-050473	16th Annual National Conference on Child Abuse & Neglect		OC-010928	Christina Rainer		0	1/27/2007 3:00 AM	4/22/2007 2:59 AM	0.00	0.00
<input type="checkbox"/>	CO-050472	16th Annual National Conference on Child Abuse & Neglect		OC-010928	Angie Dawson		0	1/27/2007 3:00 AM	4/22/2007 2:59 AM	0.00	0.00
<input type="checkbox"/>	CO-044514	2007 ADA Expo		OC-010575	Valerie Barnes		0	1/24/2007 3:00 AM	2/5/2007 2:59 AM	0.00	0.00
<input type="checkbox"/>	CO-044516	2007 ADA Expo		OC-010575	Hae-Yeon Cho		0	1/24/2007 3:00 AM	2/5/2007 2:59 AM	0.00	0.00
<input type="checkbox"/>	CO-044515	2007 ADA Expo		OC-010575	Bo Bodenschatz		0	1/24/2007 3:00 AM	2/5/2007 2:59 AM	0.00	0.00
<input type="checkbox"/>	CO-019704	2007 Health Net MS Bike Ride		OC-012005	Anne Cummings		0	5/21/2007 3:00 AM	8/2/2007 2:59 AM	0.00	0.00
<input type="checkbox"/>	CO-063061	2007 Health Net MS Bike Ride		OC-011763	Christina Palmer		0	4/26/2007 3:00 AM	8/6/2007 2:59 AM	0.00	0.00

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.

Display 10 records per page	for Kids	OC-000172	Valerie Volunteer	0	12/24/2010 6:00 PM	12/24/2010 7:30 PM	0.00	0.00	☆☆☆☆☆	Please Verify
Display 25 records per page	for Kids	OC-000010	Valerie Volunteer	0	8/24/2010 7:00 PM	8/24/2010 8:30 PM	0.00	0.00	☆☆☆☆☆	Please Verify
Display 50 records per page										
Display 100 records per page										

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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

<input type="checkbox"/>	Connection	Volunteer Opportunity ▼	Occurrence	Contact	Team	# of Guest	Start Time	End Time	Hour	Guest	Feedba
<input type="checkbox"/>	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	☆☆
<input type="checkbox"/>	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	☆☆
<input type="checkbox"/>	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	☆☆