# CERVIS Technologies Volunteer Management User Manual

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Contents

Accessing Cervis Technology

1. Open the internet browser and navigate to the Cervis log in page. This can be accessed by searching "Cervis log in" (0:05).
2. Enter the user name and password and click "Sign in to CERVIS".

3. The program will be open and tabs can be seen that are titled Volunteer Management, Event Management, Attribute Management and System Management.

4. This screen displays all of the possible actions that the user can take. Each of the tabs will be discussed in later sections.

Volunteer Management Tab

Under the volunteer management tab, there are four options for the user to choose. These can be accessed by clicking one of the four links under "Volunteer Management or clicking on the volunteer management tab above (0:20).

Add new Volunteer

1. Click on Add a new volunteer under the volunteer management tab (0:30).

2. The Add Volunteer screen will appear with a long list of information that can be filled out about each volunteer. Keep in mind this is really only necessary if the volunteer does not have access to technology to be able to create their own profile.

3. The volunteer coordinator will also have most of volunteer's information transferred from the current volunteer management software.
4. All of this information does not need to be entered as the system will create a profile with all the information the user is capable of giving.
5. The user has the ability to enter skills, availability, interests and the group they are a part of.
6. Once the user has entered all of the available information click "Submit Volunteer Information" and the volunteer will automatically be added to the database.

Volunteer Management Dashboard

1. The next tab under Volunteer Management is the Volunteer Management Dashboard (1:15).
2. The user will then see the Standard and Advanced search options. These options are all used to search through the database.

3. Under Standard options, the program allows the user to search through the database by searching for the volunteers name or email address. There is also another option to create a new volunteer profile which is the same as the Add a New Volunteer tab that was already discussed.
4. Under the Advance options, the user can conduct an advanced search. They can find active volunteers, duplicate volunteers and users with photo and file attachments.

5. Under the advanced search, the user can search by group options, skills, availability and many other categories. Click the down arrow, enter the required information and then select "Search Volunteer Database." This will bring up a list of all the people who fall under the specified category.

6. Choosing the other options, will show the users each active volunteer, duplicates or contain files and pictures.
7. Once this list of people appears, there are several actions that the user can take. Clicking on the small box next to each volunteer on the left and then choosing an option on the top will allow the user to send an email, print name tags and bulk register to name just a few.

8. Under the actions heading, there are several icons that represent actions that can be taken for each volunteer. Moving the cursor over the icons will tell you what each of them means.

Volunteer Search Result Listing

	Actions	Name ⬍	E-mail Address ⬍	Pri Phone ⬍
1. ☐	👤🔍🏃📅⏱📅	Adams, Katherine	katherine.ada@cervistech.com	719-555-2159
2. ☐	👤🔍🏃📅⏱📅	Alexander, Jeffery	jeffery.ale@cervistech.com	719-555-1627
3. ☐	👤🔍🏃📅⏱📅	Allen, Benjamin	benjamin.all@cervistech.com	970-555-1158
4. ☐	👤🔍🏃📅⏱📅	Allen, Jean	jean.all@cervistech.com	719-555-2271
5. ☐	👤🔍🏃📅⏱📅	Anderson, Catherine	catherine.and@cervistech.com	719-555-2194

9. The user can manage, view details, update a profile, register for an event, log service or create quick event. Click on the option you desire and entire the required information.

10. The first icon is the manage option and can be clicked on for any volunteer. Once this is clicked, the program allows the administrator to do a variety of things. The user can contact the volunteer, update their information, and register them for an event.

Volunteer Management: Sara Bennett

🏃 Update Volunteer Information

🔍 View Volunteer Details

📅 Register Sara Bennett for an Event

📅 Create and Register Sara Bennett for a "Quick Event"

🔍 View Events Sara Bennett is Registered For

⏱ Add/View Volunteer Service Project Hours

✉ Send E-mail to Sara Bennett

★ View/Update Interest Categories

↗ View/Update Skills

✕ View/Update Equipment

📅 View/Update Availability

👥 View/Update Groups

🔗 View/Update File Attachments

👤 Create New Volunteer and Duplicate Profile Information from Sara Bennett

👤 Assume Identity of Sara Bennett within CERVIS

👤 Delete Sara Bennett from CERVIS

[<< Main Dashboard] [< Volunteer Dashboard] [🔍 Return to Search Results]

11. The next icon allows the administrator to view details of the volunteer. Clicking on this icon will display an overview of the volunteer's information and account.
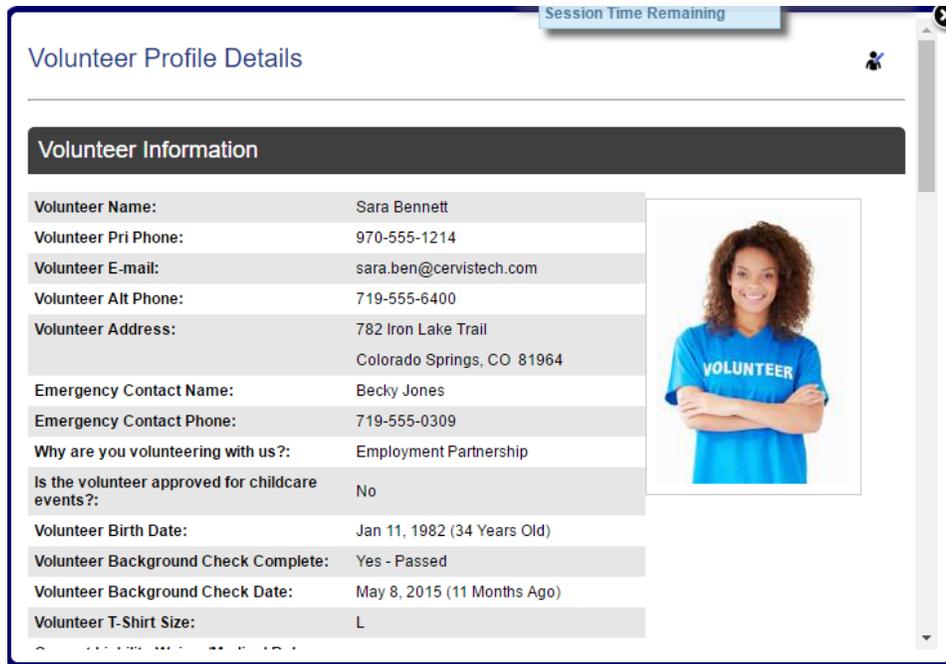
12. The next icon allows the administrator to update the volunteer. Clicking on this icon brings up the same screen as the Create a New Volunteer however, all of their information is entered and can be changed.

13. The next icon allows the administrator to register a volunteer for an event. Simply click on the icon, enter the event name and choose register for this event and the volunteer will be registered. This screen also displays the current events that the volunteer is and has registered for.

14. The log service feature is the next icon on this page. Clicking on this icon allows the administrator to select the project name, date and hours worked for the volunteer. Once these have been specified, click on Log Service Project Activity and the hours will be recorded. The administrator also has access to viewing all of the hours donated by the volunteer on the screen.

15. The last icon here is to create a quick event for the volunteer. This is used when a specific event needs to be attended by a certain volunteer. Click on this icon and the event name,

start date and time, event organizer and credit hours can be entered. Once the required information has been given, Click Submit Quick Event Registration.

16. Remember, to view what each icon means, hover the mouse over the icon and a caption will appear.

View/Manage Volunteer Follow-up

1. The next feature under the volunteer management tab is the Follow-up Management tab. This screen shows the follow up assignment listing on the bottom of the page (3:35).

2. The feature also allows the administrator to search by volunteer name for a follow up.

3. A follow up can be assigned by the administrator by entering the volunteer needing a follow up, the person the follow up is assigned to and a description. This will delegate the follow up to the group leader or another administrator.

4. Follow up notes can also be assigned and sent in an email.

Report Management

1. The report management tab is the final feature that is located within the Volunteer Management tab (4:20).
2. The Report Management tab allows the administrator to create one of ten different types of reports.
3. The ten reports include Group Participation report, Interest Category Participation Report, Volunteer Participation Report, Event/Project Participation Report, Yearly Participation Summary Report, New Volunteer Report, Cervis Permission Level Report, Volunteer Summary Report by Custom Field Value, Volunteer Participation Report by Custom Field Value and Custom Participation Report.
4. At the top of the screen the program gives the user an option to specify the dates when reports will be run and what format they will be produced in. These values should be specified here rather than in each report.

Group Participation report

1. The first specification that needs to be made for this report is deciding which group needs to be reported on. The administrator can either choose all groups or singular groups that have already been created.
2. The type of detail needs to be specified. Below is a comparison between high and low detail in a word document format.

Report Creation Date: Apr 18, 2016

Group: Boy Scout Troop 103
   Group Totals -- Volunteers*: 8   Registrations: 25   Total Hours: 65.75

Group: Central High School
   Group Totals -- Volunteers*: 0   Registrations: 0   Total Hours: 0

Group: Community Bank
   Group Totals -- Volunteers*: 6   Registrations: 24   Total Hours: 78

Group: First Baptist Church
   Group Totals -- Volunteers*: 0   Registrations: 0   Total Hours: 0

Report Creation Date: Apr 18, 2016

Group: Boy Scout Troop 103

Baldwin, Melinda	melinda.bal@cervistech.com	719-555-1935	
	Reading Mentors at Howberston Elementary	Mar 25, 2016	0.75
	Reading Mentors at Howberston Elementary	Apr 5, 2016	1.00
	Reading Mentors at Howberston Elementary	Apr 6, 2016	1.00
	Reading Mentors at Howberston Elementary	Apr 7, 2016	1.00
		Registrations: 4	Total Hours: 3.75
Castro, Maureen	maureen.cas@cervistech.com	719-555-1893	
	Reading Mentors at Howberston Elementary	Mar 23, 2016	1.25
	Reading Mentors at Howberston Elementary	Apr 2, 2016	1.25
	Reading Mentors at Howberston Elementary	Apr 6, 2016	1.25
	Reading Mentors at Howberston Elementary	Apr 7, 2016	1.25
	Reading Mentors at Howberston Elementary	Apr 9, 2016	1.25
		Registrations: 5	Total Hours: 6.25
Larson, Joann	joann.lar@cervistech.com	719-555-1886	
	Mobile Food Pantry Food Distribution	Apr 18, 2016	10.00
		Registrations: 1	Total Hours: 10
Malone, Erika	erika.mal@cervistech.com	719-555-1865	
	Reading Mentors at Howberston Elementary	Mar 22, 2016	1.50

3. The first report here shows less details and provides more of an overview of the volunteer hours while the second report has much more detail.
4. Once the information has been entered, the user can click Run Report and a report will be downloaded and opened.

Interest Category Participation Report
1. This report is very similar to the Group Participation Report and the administrator can pick a category for creating a report. The report will generate a list of people who share this interest.
2. The detail tab is the same as the Group Participation Report and the Primary option will show the volunteers who list the category as their first or second choice.

3. Once the report is ready to run, press Run Report and the system will produce the desired report.

Volunteer Participation Report
1. When generating this report, the user can search the name and specify the level of detail that the report should show similar to other reports.
2. The program also allows the user to specify to search for a volunteer that is active or not.

3. The administrator can then run the report and it will be generated.

Bell, Annie	annie.bel@cervistech.com		719-555-1312	970-555-2586
	Reading Mentors at Howberston Elementary	Mar 23, 2016		1.50
	Reading Mentors at Howberston Elementary	Mar 26, 2016		1.00
	Reading Mentors at Howberston Elementary	Apr 2, 2016		1.50
	Reading Mentors at Howberston Elementary	Apr 7, 2016		1.50
	Reading Mentors at Howberston Elementary	Apr 10, 2016		1.50
	Reading Mentors at Howberston Elementary	Apr 11, 2016		2.50
		Events Participated In: 6	Total Hours: 9.5	

4. Above is an example of a report that was generated for a volunteer.

Event/Project Participation Report
1. This report is very simple and only requires the input of the amount of detail that is desired for the report.
2. However, the reservation code provides the codes for each group to register and the staff planning option produces an overview of the hours worked in total. Below is the staff planning version of the report.

	7:00 AM	8:00 AM	1:00 PM
Sat, Mar 26, 2016	0	5	0
Fri, Apr 8, 2016	0	10	0
Thu, Apr 21, 2016	26	0	8

Yearly Participation Summary
1. The yearly participation summary is very simple and allows the user to choose the year and the amount of detail that they want to be produced. Below is a picture of the low detailed report.

Report Creation Date: Apr 21, 2016

January 2016
     January 2016 Totals -- Volunteers*: 125 Events: 10 Registrations: 282 Hours: 1108.25

February 2016
February 2016 Totals -- Volunteers*: 39 Events: 1 Registrations: 156 Hours: 369.25

March 2016
  March 2016 Totals -- Volunteers*: 47 Events: 4 Registrations: 161 Hours: 396.28

April 2016
  April 2016 Totals -- Volunteers*: 105 Events: 3 Registrations: 218 Hours: 507.29

2. The more detailed reports will show the volunteers names and even days of work.

New Volunteer Report
1. This report simply shows all of the volunteers that are new to Cervis and their organization.

Cervis Permission Level Report
1. This shows the volunteer's permission levels that have higher than normal user permissions in their account.

Administrator

Name	E-mail Address	Primary Phone	Alternate Phone
Anthony, Bruce	banthony@cervistech.com	888-549-3601	
Coleman, David	david.col@cervistech.com	719-555-1305	
Foster, James	jfoster@cervistech.com	888-549-3601	
Hill, Julie	julie.hil@cervistech.com	719-555-2131	719-555-6358
May, John	jmay@cervistech.com	888-549-3601	
Mayberry, Matthew	mmayberry@cervistech.com	888-549-3601	
Technologies, CERVIS	demo@cervistech.com	888-549-3601	

Administrator Total: 7

Leadership Team

Name	E-mail Address	Primary Phone	Alternate Phone
Adams, Katherine	katherine.ada@cervistech.com	719-555-2159	719-555-6575
Paul, Bobby	bobby.pau@cervistech.com	303-555-1753	
Thomas, Wanda	wanda.tho@cervistech.com	719-555-2257	

Leadership Team Total: 3

2. The report breaks up the volunteers into categories such as administrators and members of the leadership team.

Volunteer Custom Report by Custom Value
1. This report shows the reasons why the volunteers are volunteering with the organization. They range from high school requirements to court ordered community service.
2. Choose the custom field, detail level and then Run the Report.

Court-ordered

Name	E-mail Address	Primary Phone	Alternate Phone
Campbell, Ronald	ronald.cam@cervistech.com	970-555-1046	
Coleman, Bonnie	bonnie.col@cervistech.com	719-555-1305	719-555-6295
Francis, Deborah	deborah.fra@cervistech.com	303-555-1816	
Glover, Cameron	cameron.glo@cervistech.com	719-555-1424	
Gray, Carl	carl.gra@cervistech.com	970-555-1235	719-555-6484
Mcdaniel, Elisa	elisa.mcd@cervistech.com	303-555-1781	719-555-6365
Moore, Jimmie	jimmie.moo@cervistech.com	719-555-1606	
Rodriguez, Beverly	beverly.rod@cervistech.com	719-555-1354	719-555-6253
Romero, Gerardo	gerardo.rom@cervistech.com	719-555-1641	
Russell, Margaret	margaret.rus@cervistech.com	719-555-2215	
Stewart, Louise	louise.ste@cervistech.com	719-555-1270	
Wagner, Ashley	ashley.wag@cervistech.com	719-555-2012	

Court-ordered Total: 12

High school requirement

Name	E-mail Address	Primary Phone	Alternate Phone
Andrews, Tracey	tracey.and@cervistech.com	719-555-2040	
Arnold, Leigh	leigh.arn@cervistech.com	719-555-1977	719-555-6568

Volunteer Participation Report by Custom Field Value

1. This report is very similar to the previous report but it shows the work and tasks that the volunteer is doing.
2. Click the level of detail that is needed and then choose Run Report.

Custom Participation Report
1. This report can be generated by choosing the type of volunteers, the events that were attended, the level of detail and the custom field that needs to be reported.
2. When these have been specified Run Report can be selected.

Event Management Tab

Event Types (5:40)

1. There are four types of events that can be specified within the software that all serve a different purpose. The four events types are normal, time slot, service project and custom.
2. All of these events are used for different purposes however, they have very similar features.
3. A normal event is created when all volunteers start and end at the same time and do the same job.
4. A time slot event is created when people need to sign up for different shifts.
5. A custom event is the same as a normal event except different additional information can be entered that is specific to the project or shift.
6. A service project event is used to track service hours for a project that doesn't have specific start and end times.

Add New Event

1. To create an event start by clicking on Add Event (5:45).
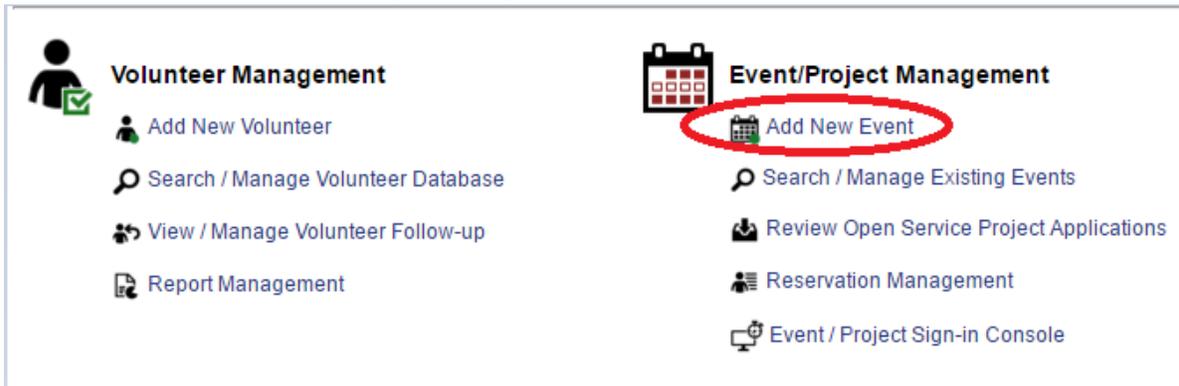
2. Then specify the type of event. The four types have been described in the previous section.
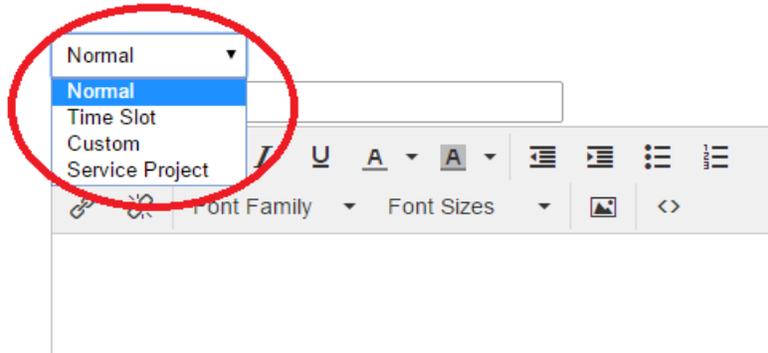
3. This will walk the user through the normal event, however, the other three types of events require very similar information.

4. Create a name for the event and write a brief description.
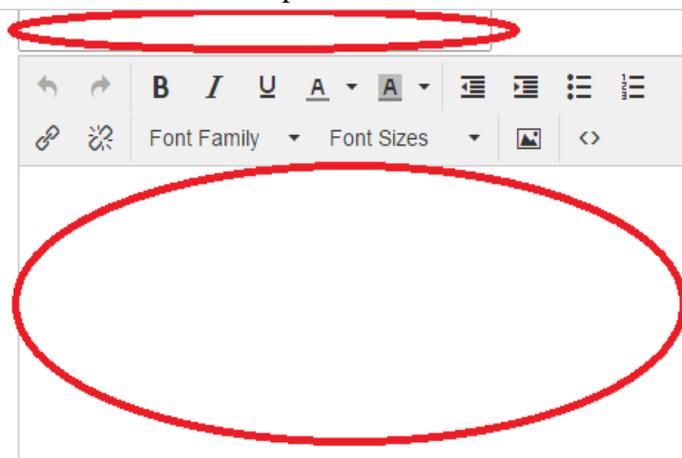
5. Add event private notes and additional information if it is needed.

6. Enter the start and end date of the event as well as the number of volunteers that are needed during the event.

Event Start Date/Time (ex. 1/15/2016):*	Date: [　　　　📅]	Time: [▼] [▼] [▼]
Event End Date/Time (ex. 1/15/2016):*	Date: [　　　　📅]	Time: [▼] [▼] [▼]
Number of Volunteers Needed:* (0 = Unlimited)	0		

7. Enter the meeting location and address.
8. Enter the event organizer and answer the yes and no questions based on preferences.

Event Organizer:* ⓘ	🔍 Name Lookup	, --
Event Secondary Organizer: ⓘ	🔍 Name Lookup	None, -- 🗑
Assign Managing Group:* ⓘ	None ▼	
Display Event Contact Information:*	Event Organizer ▼	
Allow Event Organizer(s) to modify Event Details:* ⓘ	No ▼	
Notify Event Organizer(s) of Event Registrations:*	No ▼	
Notify Event Organizer(s) of Canceled Registrations:*	No ▼	
Allow Waitlist When Registration is Full:*	No ▼	

9. Continue filling out the rest of the information based on the details of the event.
10. Once all the information has been filled out, click on Submit Event Details to post the event online. The administrator can see this information by viewing the calendar. This will be explained in the next section.

Search/Manage Existing Events

1. Click on the link to enter the event/project management dashboard (8:40).

2. The screen will come up with a variety of options to search through events.
3. Under the standard options, the user can search by the event name, event keyword or even add a new event.

4. To access the events, select the search method for the events on the left and enter the name or keyword on the search bar on the right. Click Search for Event Database when it is ready.
5. To add a new project or event, follow the same procedure that was described in the previous section.
6. The advanced options are a little bit different than the standard options and can be more complex.

7. When clicking on advanced search options, it will bring up a window to search for many different types of events.

8. This feature allows the user to search for an event by name, keyword, category, type, status, registration page, "pinned" status and event organizer. All of the features that are included under the advanced options on the previous screen can be searched for in this location as well. Click search for event database when the qualifications have been entered.

9. The last feature is the event listing. It can either be displayed in calendar or list view. The list view is the default but the calendar view can be seen by selecting to display calendar view.

Review Open Service Project Applications

1. To access this tab, click on the third link under the Event/Project Management tab (10:10).

2. This is where volunteers can request to work a certain job or do a task during their volunteer shift.
3. If the administrator wants to approve or disapprove the application, they must select the small box to the left of the date and choose either approve or disapprove.

4. Choosing to manage the selected volunteers will bring the user to the Volunteer Management Dashboard which was discussed in the volunteer management section.

Reservation Management

1. Access the reservation management page by clicking on the link that is under Event/Project Management (11:00).
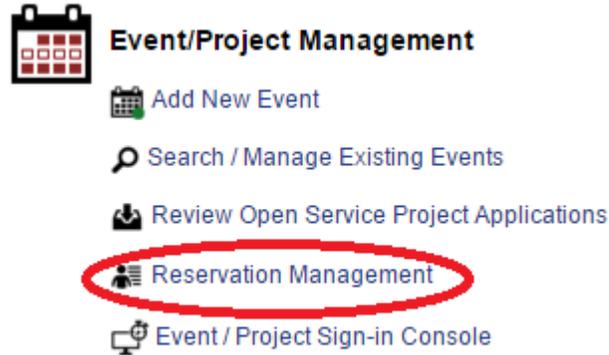
2. Create a reservation for a volunteer for a certain event by entering a registration code in the first box and description underneath it.

3. Next enter the reservation contact. This will search the database for the person that will be contacted. Enter the group association if there is one and then select Create Reservation.

4. Underneath this feature, there is a reservation listing. The user can click on the small gray box to the left of the name and choose to manage update or delete the reservation. Choosing manage allows the administrator to assign a volunteer to an event.

Reservation Listing

		Reservation Code	Reservation Description	Reservation Items	Reservation Contact	Group Association
☐	🔗 ✉	cbank	Community Bank Employment Partnership Program	3		Community Bank
☐	🔗 ✉	stjohns2015	Reservations for St John's Catholic School Parents	3		St. John's Catholic School
☑	🔗 ✉	targetserves	Target Employee Partnership	0		Target Employees

[Manage Selected Reservation]   [Update Selected Reservation]   [Delete Selected Reservation(s)]

5. Enter the required information and select Assign Event to Registration.

Reservation Assignment Dashboard

Reservation:	targetserves -- Target Employee Partnership
Event Date - Name:	Please select an event below: ▼
Number of slots to Reserve:	

✔ Assign Event to Reservation

6. Choosing to update the reservation allows the user to change anything from the original reservation.

Event/Project Sign-in Console

1. To access the sign in console click on the last link under Event/Project Management (12:20).

Event/Project Management

- Add New Event
- Search / Manage Existing Events
- Review Open Service Project Applications
- Reservation Management
- Event / Project Sign-in Console
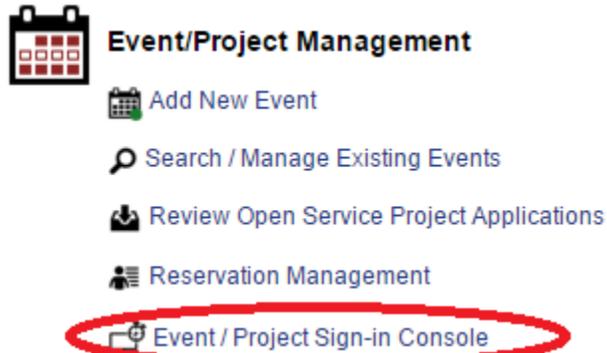
2. This feature allows the administrator to sign in and sign out volunteers and groups. The screen will display the volunteers that are currently signed in.

| Name Lookup | 6:10:45 PM |

Volunteers / Groups Currently Signed In to an Event / Service Project

Volunteer / Group Name	Event / Project Name	Sign In Time	Action	
Charlene Bridges	Sorting Canned Food Donations	Apr 24, 2016 9:00 AM	Sign Out	🗑
Elisa Mcdaniel	Sorting Canned Food Donations	Apr 24, 2016 8:01 AM	Sign Out	🗑
Greg Hodges	Sorting Canned Food Donations	Apr 24, 2016 8:59 AM	Sign Out	🗑
Heather Foster	Mobile Food Pantry Food Distribution	Apr 24, 2016 7:02 AM	Sign Out	🗑
Jackie Fletcher	Mobile Food Pantry Food Distribution	Apr 24, 2016 6:55 AM	Sign Out	🗑
Joshua Bryant	Mobile Food Pantry Food Distribution	Apr 24, 2016 7:04 AM	Sign Out	🗑

Volunteers Currently Signed In: 6

3. Simply click on sign out to sign out the volunteer.

Volunteers / Groups Currently Signed In to an Event / Service Project

Volunteer / Group Name	Event / Project Name	Sign In Time	Action	
Charlene Bridges	Sorting Canned Food Donations	Apr 24, 2016 9:00 AM	Sign Out	🗑
Elisa Mcdaniel	Sorting Canned Food Donations	Apr 24, 2016 8:01 AM	Sign Out	🗑

Attribute Management Tab

Interest Category Inventory Management

1. To access this tab, click on the first link under Attribute Management (12:55).
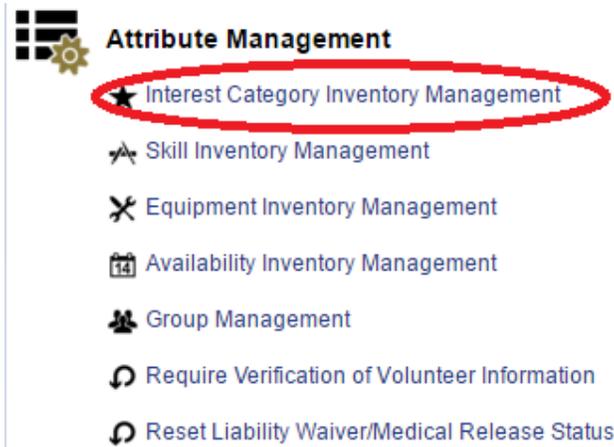
2. The user can start by creating a new category or look at the already existing category below.

3. To create a new interest category, start by entering a name, a contact for the category and then select a parent category.

4. Enable or disable the interest category selectability and click Add Interest Category.

5. Below is the inventory of interests. The user can check the gray circle on the left and make one of three choices. They can remove the selected category, update the category or show volunteers with that interest.

			Castle Rock	Julie Hill
○	⌘⌘⌘	⬦🔍👤👤	Colorado Springs	Julie Hill 🔍✉
○	⌘⌘⌘	⬦🔍👤👤	Colorado Springs Downtown	Julie Hill 🔍✉
○	⌘⌘⌘	⬦🔍👤👤	Colorado Springs North	Julie Hill 🔍✉
○	⌘⌘⌘	⬦🔍👤👤	Colorado Springs West	Julie Hill 🔍✉
○	⌘⌘⌘	⬦🔍👤👤	Monument	Julie Hill 🔍✉
○	🔒	⬦🔍👤👤	CERVIS Demonstration Console - Private	

Remove Selected Category   **Update Selected Category**   **Show Volunteers with Selected Interest**
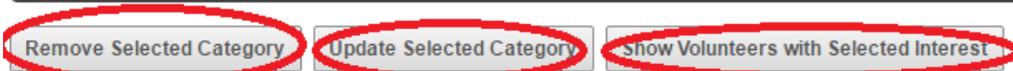
6. Selecting Show Volunteers with selected interest will show a list of the volunteers who share that interest.
7. The user can also take one of four in the actions column.

Links	Actions	Interest Category	Interest Category Contact
○	⬦🔍👤👤	CERVIS Demonstration Console	
○ ⌘⌘⌘	⬦🔍👤👤	Programs/Departments	Julie Hill 🔍✉

8. The user is able to search for all the volunteers with this interest, volunteers who only show this interest or volunteers who do not show this interest. This will produce a list of volunteers in the window.

Volunteer Search Result Listing

	Actions	Name ⇕	E-mail Address ⇕	Pri Phone ⇕
1. ☐	👤🔍🔧📅⏱📇	Adams, Katherine	katherine.ada@cervistech.com	719-555-2159
2. ☐	👤🔍🔧📅⏱📇	Alexander, Lois	lois.ale@cervistech.com	719-555-2327
3. ☐	👤🔍🔧📅⏱📇	Andrews, Tracey	tracey.and@cervistech.com	719-555-2040
4. ☐	👤🔍🔧📅⏱📇	Arnold, Leigh	leigh.arn@cervistech.com	719-555-1977
5. ☐	👤🔍🔧📅⏱📇	Bailey, Brandon	brandon.bai@cervistech.com	970-555-1018
6. ☐	👤🔍🔧📅⏱📇📎	Baker, William	william.bak@cervistech.com	970-555-1109

Skill Inventory Management

1. To access the skills management tab, select the second link under the attribute management header (14:50).

2. The user can first add skills at the top of the page. Enter the skill code which can be anything the user wants. Then add the skill name and description and click Add Skill.

3. On the bottom of the page, the user can search for volunteers with specific skills very similarly to the attribute search.

4. Select the box on the left and choose to remove skill, update the skill or show volunteers with the selected skill.
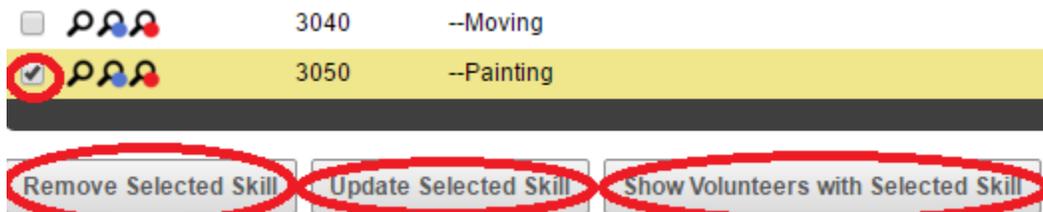
5. The user can also take three actions using the icons to the left of the code.

0020   --Managing People
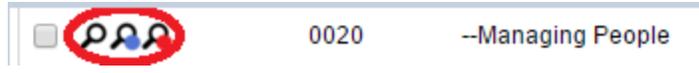
6. The first searches all of the volunteers with that skill, the second searches for volunteers who only have that skill and the third searches the volunteers who don't have that skill. Click on the icon to produce a list of the desired volunteers.

Equipment Inventory Management

1. Access the Equipment Inventory Management page by selecting the third link under the Attribute Management header (16:00).

2. Enter the equipment code, name and click Add Equipment to add it to the database.

3. This inventory is set up the same as the Skill Management inventory.
4. Click on the gray box and then choose either Remove, Update or Show Volunteers with Selected Equipment.

5. There are also three icons under the actions column that can be selected. They can search for the volunteers with the equipment, volunteers only with that equipment and volunteers that don't have the equipment.

Actions		Code	Equipment
☐	👤👤👤	0001	Hammer

6. This brings the user to the list of volunteers. Simply click on the icon to view the list.

Availability Inventory Management

1. To access the Availability Inventory Management, click on the link under the Attribute Management column (16:20).
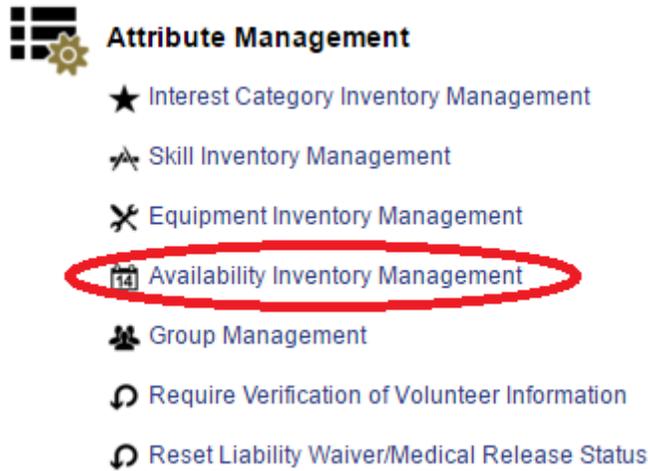
2. At the top of the screen is the place to add availability.
3. Create a code, name and description if necessary and click Add Availability.

4. Underneath is the Availability Inventory. This is the place to search for volunteers that are available at certain times and on certain days.
5. Check the box next to the availability and either Remove, Update or Show Volunteers with Selected Availability.

		0011	Weekdays - Afternoons
		0012	Weekdays - Evenings
		0013	Weekends - Mornings
		0014	Weekends - Afternoons
		0015	Weekends - Evenings

Remove Selected Availability   **Update Selected Availability**   **Show Volunteers with Selected Availability**

6. The user can also make one of three actions under the actions column. The options search for all volunteers that are available at that time, volunteers only available at that time and volunteers not available.

		0001	Sunday
		0002	Monday
		0003	Tuesday

7. Click on the desired outcome and a list of volunteers with this availability will appear.

Volunteer Search Result Listing

	Actions	Name ⬍	E-mail Address ⬍	Pri Phone ⬍
1.		Allen, Benjamin	benjamin.all@cervistech.com	970-555-1158
2.		Allen, Jean	jean.all@cervistech.com	719-555-2271
3.		Andrews, Tracey	tracey.and@cervistech.com	719-555-2040
4.		Bailey, Brandon	brandon.bai@cervistech.com	970-555-1018
5.		Baker, William	william.bak@cervistech.com	970-555-1109
6.		Ball, Ana	ana.bal@cervistech.com	719-555-1907
7.		Barnes, Teri	teri.bar@cervistech.com	719-555-2019
8.		Bell, Annie	annie.bel@cervistech.com	719-555-1312

Group Management

1. To access the Group Management tab, click on the link under Attribute Management (17:30).
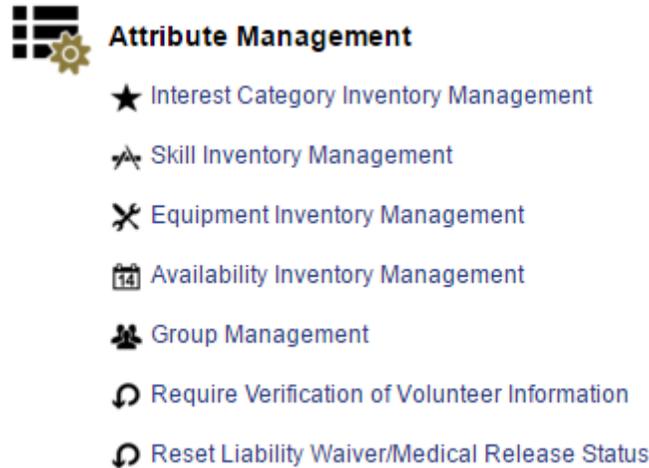
2. At the top of the page, the software allows the user to search the database. Search by group name, leader name or Add a new group. Select the option by clicking on the circle and then type in the search bar. Click Search Group Database.

3. Under the advanced options the user can choose to Find All Groups or Find My Groups. Click on the circle next to the option to view the lists.

4. Below the search bar is the Group Inventory. There are various actions that can be taken here.
5. Select the box to the left of the actions and then choose to Update, Manage, Show Members, Show Leaders or Remove the Group.

6. Under the actions column there are five icons. Simply click on the icon to view the desired screen.
7. The first icon is to manage the group. Click on this to bring up several more options and manage the group.

Group Management for Law Enforcement

👥 View/Update Law Enforcement Group Information

📅 Register Law Enforcement for an Event

🔍 View Events Law Enforcement is Registered For

⏱ Add/View Service Project Hours for Law Enforcement

👥 View/Update Volunteers assigned to Law Enforcement

📎 View/Update File Attachments for Law Enforcement

Group Notes:

📝 Add Group Note

No Notes Listed.

8. The next icon is used to register the group for an event. Clicking on the icon will allow the user to register the group for an event by entering certain information. At the bottom of the page is the list for the registration history.

Group Name:	First Baptist Church
Event Date - Name:	Sep 23, 2015 - Dec 22, 2016 -- Office Work ▼
# of Group Participants:	
Registration Note: ℹ	

✔ Register First Baptist Church for this event

Display activity between these dates: **Start Date:** 04/25/2015 📅 **End Date:** 04/25/2017 📅 [Filter History]

[NE] = Normal Event   [TS] = Time Slot Event   [QE] = Quick Event   [SP] = Service Project   [CE] = Custom Event

Event / Project Registration History (04/25/2015 - 04/25/2017)

☐	Event Date & Time ⬍	Event Name ⬍	Organizer ⬍	Service Hours	Category	Notes

Total Service Hours:

9. The next icon is used to search for the list of volunteers that are in this group. Click on the icon and a list of the volunteers will appear.

Volunteer Search Result Listing

	Actions	Name ⬍	E-mail Address ⬍	Pri Phone ⬍
1. ☐	👤🔍🔧📅⏱🚪	Alexander, Jeffery	jeffery.ale@cervistech.com	719-555-1627
2. ☐	👤🔍🔧📅⏱🚪	Anderson, Catherine	catherine.and@cervistech.com	719-555-2194
3. ☐	👤🔍🔧📅⏱🚪	Anthony, Bruce	banthony@cervistech.com	888-549-3601
4. ☐	👤🔍🔧📅⏱🚪	Arnold, Leigh	leigh.arn@cervistech.com	719-555-1977
5. ☐	👤🔍🔧📅⏱🚪	Barnes, Teri	teri.bar@cervistech.com	719-555-2019
6. ☐	👤🔍🔧📅⏱🚪	Brooks, Damon	damon.bro@cervistech.com	719-555-1571
7. ☐	👤🔍🔧📅⏱🚪	Butler, Annie	annie.but@cervistech.com	719-555-1914

10. The next icon can be used to search volunteers that are only involved in this group. This will produce a list of volunteers similar to the previous icon.
11. The last icon is used to search for volunteers that are not in this group. Clicking on this link will also produce a list very similar to the previous two icons.

Require Verification of Volunteer Information

1. To access the Require Verification of Volunteer Information screen, click on the link that is located under the Attribute Management tab (18:55).
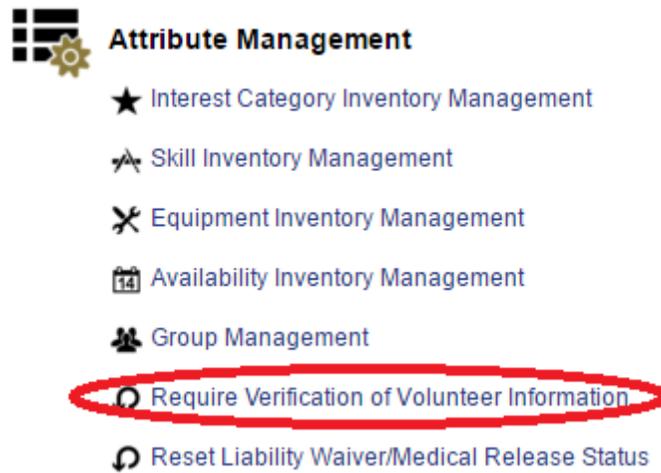
2. A screen will appear that includes red lettering. Click Yes, Proceed with Reset to reset the volunteer information.

3. This will require all of the volunteers to update their account information.

Reset Liability Waiver/Medical Release Status

1. To access the Reset Liability Waiver/Medical Release Status page click on the final link under the Attribute Management tab (19:25).

2. Red lettering will appear above the two actions that can be taken.
3. Click Yes, Proceed with Reset to reset the liability waiver.

System Management Tab

Change Password

1. To change the password for Cervis click on the link under the System Management tab (19:45).

System Management

🔒 Change Password

Edit System Configuration

Volunteer Data Import

File Management

CERVIS Customer Support Tool

View System Log

CERVIS User Manual

2. Enter a new password in both spaces and select change password.

New Password: _____

Confirm New Password: _____

Password Strength: Too Short

🔒 Change Password

Edit System Configuration

1. Edit the system configuration by clicking on the link under the System Management tab (20:00).
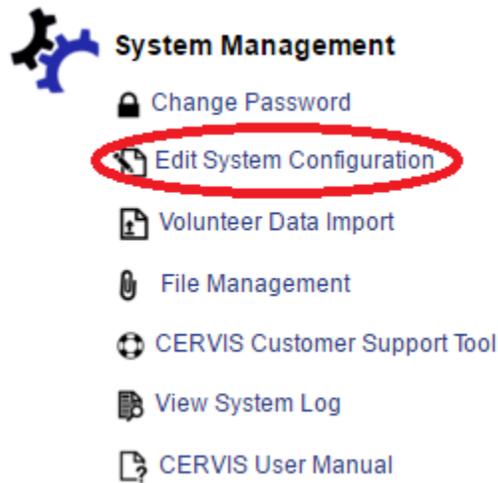
2. Click on the upside down triangle located next to the title to reveal the information that can be changed.

3. Once the information appears, edit the text that needs to be changed and select Update Configuration.

4. The changes that are made will appear throughout the software.

Volunteer Data Import

1. Access the Volunteer Data Import click on the link under the System Management tab (20:30).

2. Follow the steps that are listed on the screen to import the file. Once the steps have be completed select the down arrow next to the options and specify each category.

3. Lastly, select Import Data into Cervis to import the data.

File Management

1. Access the File Management tab by selecting the link under System Management (20:50).

2. The user can upload a new file to the database by selecting Choose File, click on the file and choose Upload New File Attachment.
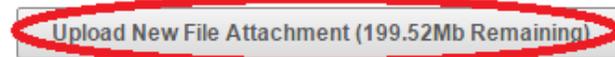

3. The user can also view the file database below. There is a list of files that are currently being managed.

4. Select the gray box on the left hand side and then Open Selected Attachment or Remove Selected Attachment.

Cervis Customer Support Tool

1. To access the Cervis Customer Support Tool click on the link under the System Management tab (21:20).

2. This will launch a new window that contains various options for the user to get help.
3. At the top there is a search bar which can be used to search any keywords about the issue.

4. Under the search bar is a variety of User Manuals and information documents that explain in further detail about the features of the program. Click on the document that may answer questions pertaining to the problem.

5. On the bottom of page there are a few links that allow the user to view future requests. Click on the double arrow pictured below to access the full list of documents.

Feature Requests (109 »)   **User Feedback** (0) »

💡 Reoccurring Events   No topics found - Add Article »

💡 Allow volunteer to export volunteer event info to electr

💡 Volunteer Calendar View to Match the Admin Calenda

6. These documents are exceptional tools and will help the user to better understand all of the features in the software.

View System Log

1. To View the System Log, click on the link that is located under the System Management tab (21:40).

2. This log contains a list of successful sign ins for the volunteers. The date, time and event name will appear in the chart when there is a successful log in.
3. Edits cannot be made to the system but the user can search the database.
4. Search the database by typing in the search bar and then selecting Search System Log. The successful log in will appear.

Cervis User Manual

1. Access the Cervis User Manual by clicking on the link that is under System Management (22:00).
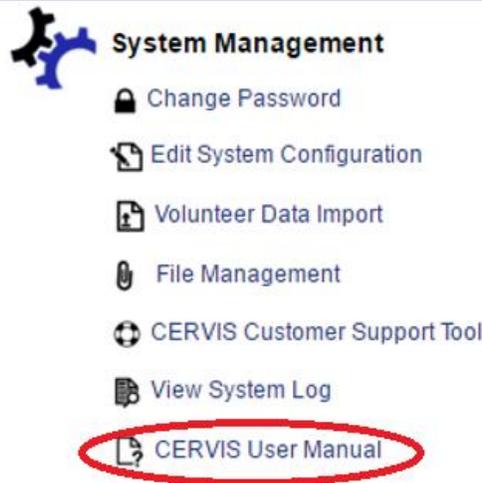
2. This will launch a new window that is the table of contents of the user manual. Click on the link that will satisfy the question or needs that may exist.

3. On the right of the page is the Knowledge Based and Forum Features. There are various options to choose from or use the search bar.
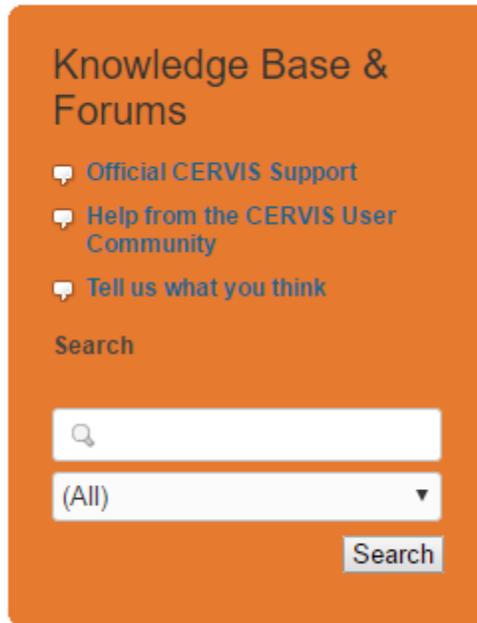
4. In addition, Cervis has an excellent customer support system and the contact information is located in the top right corner of the screen.