Raptor® Volunteer Management Guide

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Overview of Raptor Solutions

Welcome to Raptor Technologies®, the nation's leading provider of integrated school safety technologies. Our mission is to protect every child, every school, every day.

Raptor Volunteer Management

The Raptor Volunteer Management System streamlines the volunteer process from application to screening applicants to tracking hours to reporting.

First, volunteer applicants apply in an easy-to-use, customizable application. They are then checked for sex offender status and criminal background. Finally, the applications are compiled for easy review and approval. Hours are automatically tracked when the volunteer signs in and out of a building, or the volunteer can self-enter their hours and sign up for events in Raptor's Volunteer Portal. A variety of reports–including volunteer hours and top volunteers–can quickly be accessed and exported.

Understanding the Dashboard

The Dashboard displays on the home screen upon user sign in. It provides a graphical view of up-to-date information on the activity in Raptor. If you hover your cursor over a portion of the graph, a tooltip displays the count for that part of the graph.

The information that displays depends on the user's role and permissions. If you do not the appropriate permissions, the dashboard is empty.

If you have the *Can Run <Module> Reports* permission, you can see the module related statistics for that module on the dashboard. The District Admin, Building Admin, Entry Admin and Volunteer Coordinator typically has this permission and they can view the following information on the dashboard:

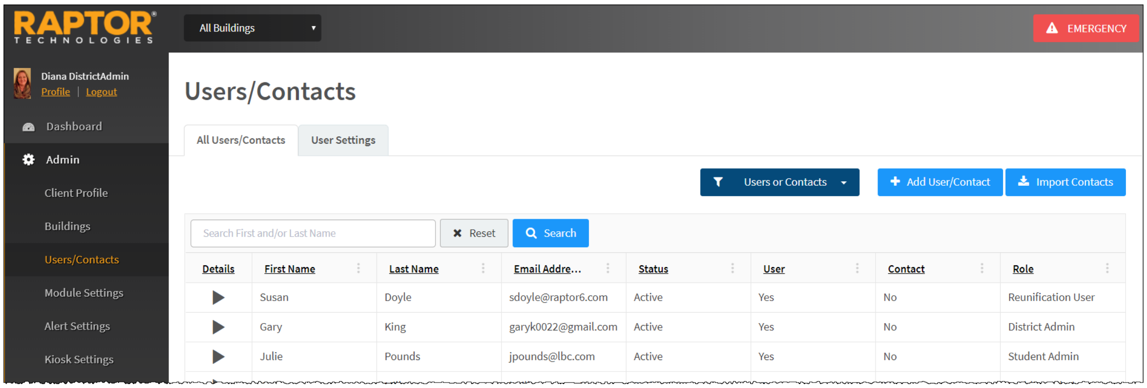
- **Active Volunteers** – Displays the number of volunteers currently signed in, total hours for the week, and total hours for the month.
- **Volunteer Applications** – Displays the number of new or renewed volunteer applications that have been submitted for the current week, the number of applications pending approval, and the number of applications that have been approved for the current week.

Volunteer Dashboard

The Volunteer dashboard displays information about the active volunteers, such as the number of volunteers currently signed in, the total hours for the week and total hours for the month. It also shows information about volunteer applications, including the number of new or renewing application for the current week, the number that are pending approval, and the number that have been approved for the week.

Managing Users and Contacts (Admin)

You can manage the users and contacts in Raptor from the **Users/Contacts** menu item under **Admin**.



From the **Users/Contacts** workspace, you can:

- Add Users and Contacts
- Import Contacts
- Modify Users and Contacts
- View and Modify Contact Notifications
- Modify User Role and Permissions
- View User Password and Details
- Activate and Deactivate Users
- Reset Password
- Specify Maximum Failed Logins
- Specify if Password Change Required Upon First Login
- Enable or Disable New User Training Videos

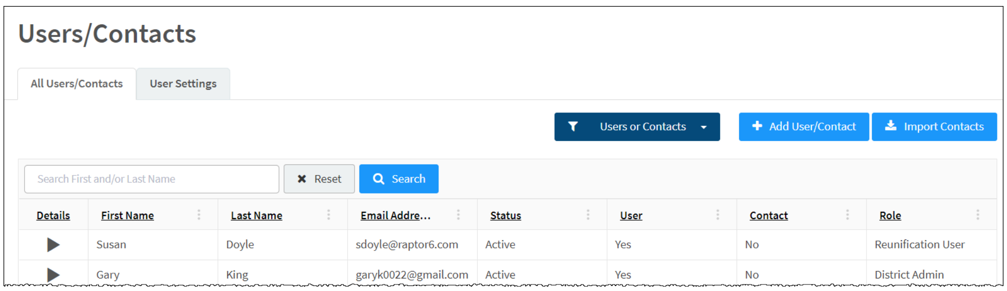
Add Users and Contacts

Users with the *Can Manage Users* permission can add Raptor users and contacts. The account can be for a user and contact, a user only, or a contact only.

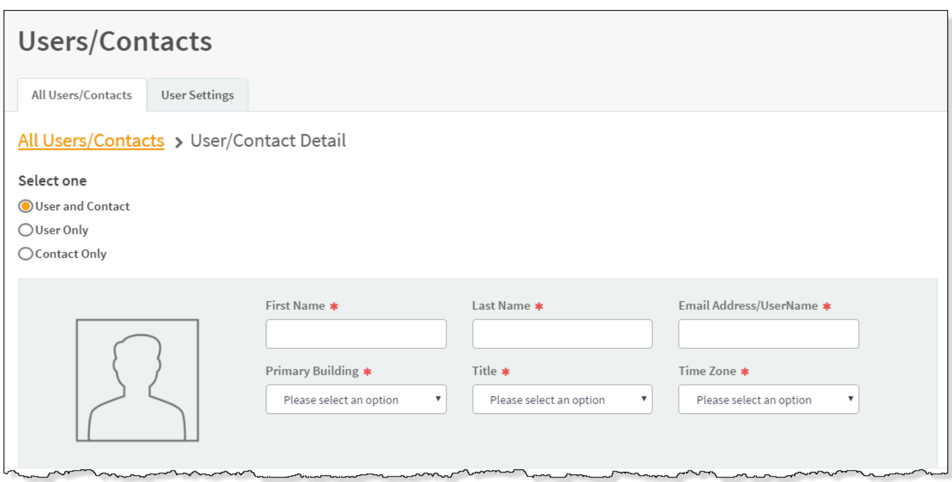
User and Contact Account

Perform the following steps to add an account for a user and contact. This type of account is for a user who is also a contact.

1. In the navigation menu, select **Admin > Users/Contacts**.



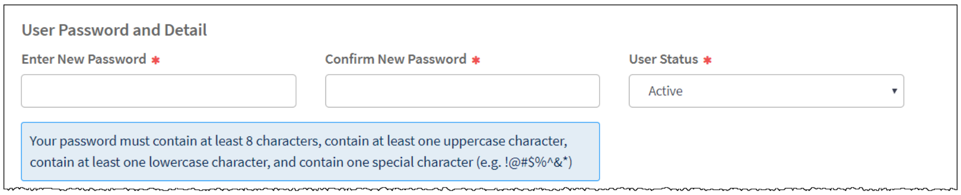
2. On the **All Users/Contacts** tab, click **Add User/Contact**.
3. Select the **User and Contact** option.



4. On the **User/Contact Detail** workspace, specify the following user information in the fields (all fields are required):
   - **First Name*** - Enter the user's first name.
   - **Last Name*** - Enter the user's last name.
   - **Email Address/User Name*** - Enter the user's email address. This becmes their user name when logging in to Raptor.

- **Primary Building*** - Select the user's primary building from the drop-down list.
- **Title*** - Select the user's title from the drop-down list.
- **Time Zone*** - Select the time zone where the user is located.

5. In the **User Password and Detail** area, specify the following information:

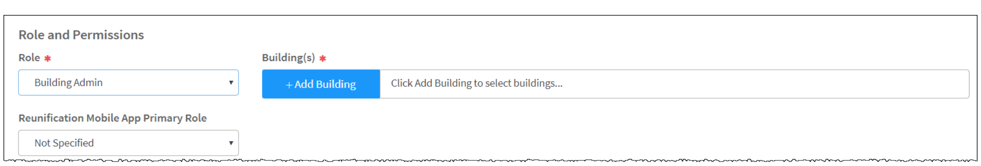


- **Enter New Password*** - Enter a password; the password must contain 8 or more characters, at least one character in uppercase, and at least one special character.
- **Confirm New Password*** - Re-enter the password to confirm it.
- **User Status*** - Select the user's status from the drop-down menu (Active or Deactivated).

6. In the **Contact Detail** area, specify the following information:

- **Preferred Contact Method*** - Select how the user wants to be contacted from the drop-down list.
- **Text Messaging Phone** - Enter the phone number to send text message notifications.
- **Voice Phone** - Enter the phone number to send a voice notification.

7. Under **Role and Permissions**, select the **Role** to assign to the user account.



8. In the **Building(s)** field, click **Add Building** and select the building from the drop-down list to specify the building to which the user has permission to view in Raptor. You can add multiple buildings if the role allows for this.

> **Note:**
> If the **Role** is set to *District Admin* or *District Volunteer Coordinator*, this field does not display since they can access all buildings.

9. Select the **Reunification Mobile App Primary Role** REU from the drop-down list. Depending on the role that is selected, the allowable permissions display in the lower portion of the **Role and Permissions** section. Select the check box next to each permission you want the user to be granted.

> **Note:**
> - Refer to Understanding Permissions for additional information about each permission.
> - If the check box has an icon next to it, the user creating the new account does not have permission to grant that specific permission.

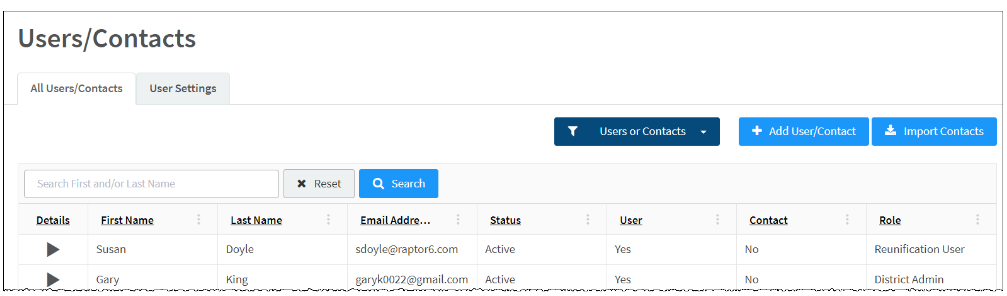
10. Click **Save**.

You are returned to the **All Users/Contacts** workspace and a message displays indicating the new user was successfully saved.

User Only Account

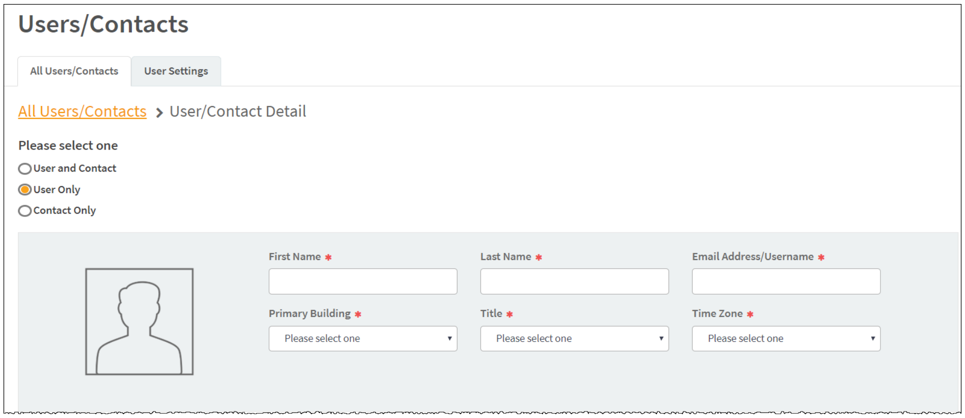
Perform the following steps to add only a user to the Raptor system:

1. In the navigation menu, select **Admin > Users/Contacts**.

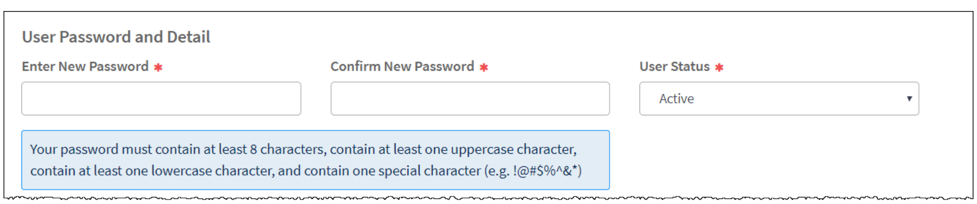


2. On the **All Users/Contacts** tab, click **Add User/Contact**.

3. Select the **User Only** option.

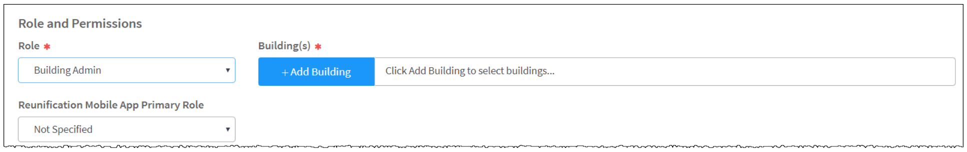


4. On the **User/Contact Detail** workspace, specify the following user information in the fields (all fields are required):
   - **First Name*** - Enter the user's first name.
   - **Last Name*** - Enter the user's last name.
   - **Email Address/User Name*** - Enter the user's email address. This becomes their user name when logging in to Raptor.
   - **Primary Building*** - Select the user’s primary building from the drop-down list.
   - **Title*** - Select the user’s title from the drop-down list.
   - **Time Zone*** - Select the time zone where the user is located.
5. In the **User Password and Detail** area, specify the following information:



   - **Enter New Password*** - Enter a password; the password must contain 8 or more characters, at least one character in uppercase, and at least one special character.
   - **Confirm New Password*** - Re-enter the password to confirm it.
   - **User Status*** - Select the user's status from the drop-down menu (Active or Deactivated).

6. Under **Role and Permissions**, select the Role to assign to the user account.



7. In the **Building(s)** field, click **Add Building** and select the building from the drop-down list to specify the building to which the user has permission to view in Raptor. You can add multiple buildings if the role allows for this.

> **Note:**
> If the **Role** is set to *District Admin* or *District Volunteer Coordinator*, this field does not display since they can access all buildings.

8. Select the **Reunification Mobile App Primary Role**REU from the drop-down list.
9. Depending on the role that is selected, the allowable permissions display in the lower portion of the **Role and Permissions** section. Select the check box next to each permission you want the user to be granted.

> **Note:**
> If the check box has an icon next to it, the user creating the new account does not have permission to grant that specific permission.

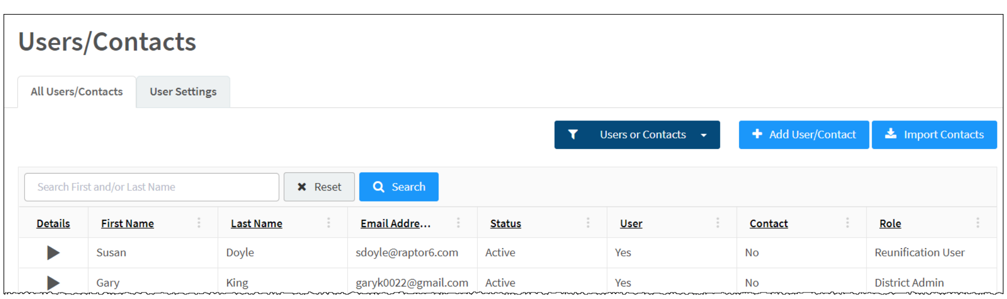
10. Click **Save**.

You are returned to the **All Users/Contacts** workspace and a message displays indicating the new user was successfully saved.

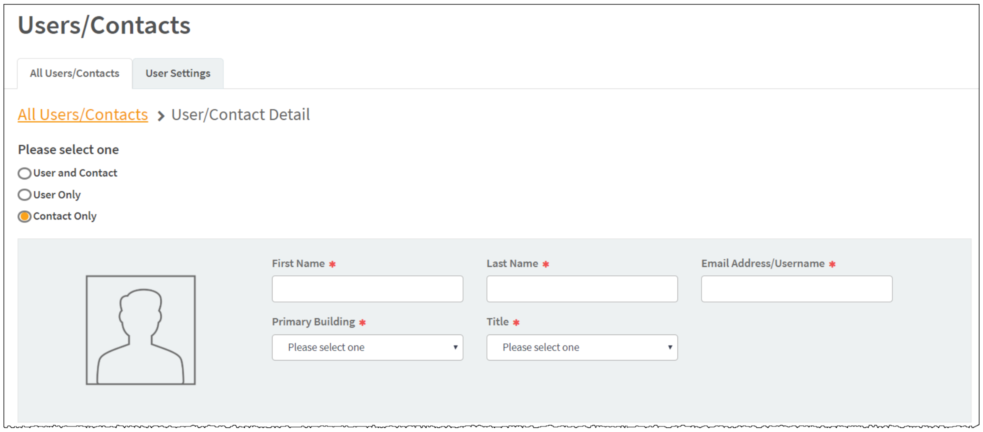
Contact Only Account

Perform the following steps to add only a contact to the Raptor system:

1. In the navigation menu, select **Admin > Users/Contacts**.



2. On the **All Users/Contacts** tab, click **Add User/Contact**.
3. Select the **Contact Only** option.



4. On the **User/Contact Detail** workspace, enter the following user information in the fields (all fields are required):
   - **First Name** - Enter the user's first name.
   - **Last Name** - Enter the user's last name.
   - **Email Address/User Name*** - Enter the user's email address. This becomes their user name when logging in to Raptor.
   - **Primary Building*** - Select the user's primary building from the drop-down list.
   - **Title*** - Select the user's title from the drop-down list.
5. In the **Contact Detail** area, specify the following information:

   - **Preferred Contact Method*** - Select how the user wants to be contacted from the drop-down list.
   - **Text Messaging Phone** - Enter the phone number to send text message notifications.
   - **Voice Phone** - Enter the phone number to send a voice notification.
6. Click **Save**.

   You are returned to the **All Users/Contacts** workspace and a message displays indicating the new user was successfully saved.

Import Contacts

Administrators with the *Can Manage Users* permission can select, map, and import a file containing one or more contact records into the system.

> **Note:**
> To use this feature, you must first create an Excel spreadsheet or comma delimited file that contains the required information.

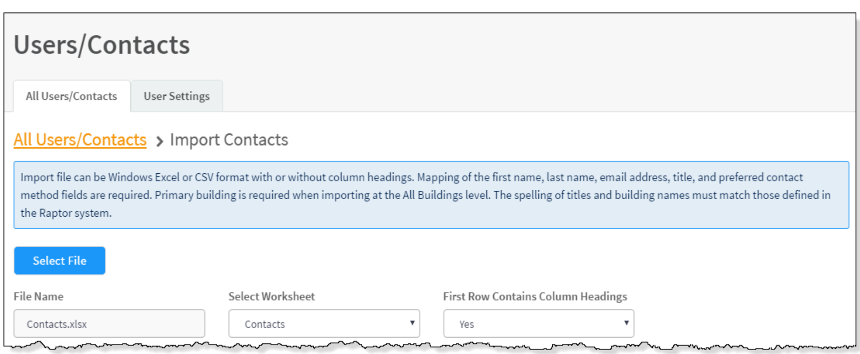
The file can contain the following contact information to be imported:

- First Name*
- Last Name*
- Email Address*
- Title*
- Notification Method*
- Text Phone - required only if defined as a notification method
- Voice Phone - required only if defined as a notification method
- Primary Building - required only if you are importing contacts for All Buildings

> **Note:**
> Primary Building is not a field mapping option at the building level. The building in the building selector will be used.

Perform the following steps to import contacts.

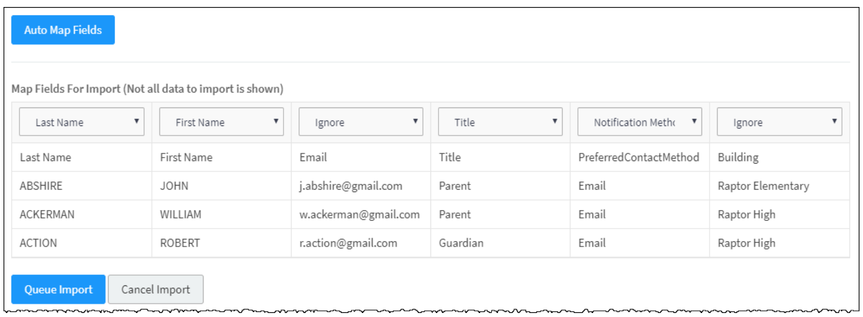
1. In the navigation menu, select **Admin > Users/Contacts**.
2. Click **Import Contacts**.



3. Click **Select File** and navigate to the location where the file is saved on your computer.
4. Select the **Excel** or CSV file and click **Open**.

5. If you used Excel and the file contains multiple worksheets, select the worksheet that contains the custom alert information from the **Select Worksheet** drop-down list.
6. If the first row of the worksheet contains column headings, select **Yes** from the **First Row Contains Column Headings** drop-down list. Otherwise, select **No**.
7. Click **Auto Map Fields** to automatically map the column headings in the file to the mapping names in Raptor. The names must be identical.You can also manually map each of the columns to be imported by selecting the appropriate fields in the drop-down menu above each column that displays.

> **Note:**
> First Name, Last Name, Email Address, Title and Notification Method are required columns. The columns with **Ignore** selected with not be imported.



8. Click **Queue Import**.

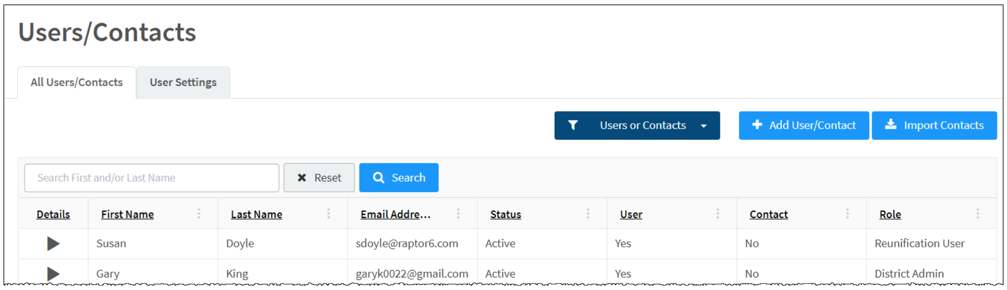
   A message displays in the lower right corner of the screen stating that the import job was successfully added to the import queue for processing.

   When the import has completed processing, an email will be sent to the email address of the user indicating the number of records successfully imported and any error that may have occurred.

View and Modify Users/Contacts

Users with the *Can Manage Users* permission can view all users that have been added to the Raptor system on the **All Users/Contacts** workspace.

1. In the navigation menu, select **Admin > Users/Contacts**.



2. From the Building Selector, select the building or select **All Buildings**.
3. Enter the first or last name in the **Search** box for the user account or contact that you want to modify and then click **Search**.
4. Click the ▶ icon to expand the **User/Contact Detail**.
5. Modify any of the current account information, or change the account type as follows:
   - Change a *user and contact* account to a *user account only* or *contact account only* (see Modify User and Contact Account).
   - Change a *user account* to a *contact account* only or to a *user and contact* (see Modify User Only Account).
   - Change a *contact* to a *user account* only or a *user account and contact* (see Modify Contact Only).
6. When you have completed your changes, click **Save**.

Modify User and Contact Account

If the account is currently defined as a **User and Contact**, you can change it to a **User Only** or **Contact Only** account.

1. On the **User/Contact Detail** workspace, click one of the following options:
   - **User Only** - to collapse the contact information for the user account; the user no longer receives notifications.
   - **Contact Only** - to collapse the user details, and role and permissions for the account; the user can no longer log in as a user and they will only receive notifications.

2. Click **Save**.

> **Note:**
> If you change a **User and Contact** to a **User Only** or **Contact Only**, the user and/or contact information is not deleted; it is only disabled. Subsequently, if you re-enable the user or contact, that information will be reinstated except for the password, which must be re-entered and confirmed.

Modify User Only Account

If the account is currently defined as a **User Only**, you can change it to a **User and Contact** or **Contact Only** account.

1. On the **User/Contact Detail** workspace, click one of the following options:
   - **User and Contact** – to expand the **Contact Details** area and **Contact Notifications** grid on the workspace.
   - **Contact Only** – to collapse the user information for the account; the user can no longer log in as a user and they will only receive notifications.
2. If you selected **User and Contact**, complete the contact details and contact notifications for the user account.
3. Click **Save**.

Modify Contact Only

If the account is currently defined as a **Contact Only**, you can change it to a **User and Contact** or **User Only** account.

1. On the **User/Contact Detail** workspace, click one of the following options:
   - **User and Contact** – to expand the **User Detail** area on the workspace.
   - **User Only** – to collapse the **Contact Detail** area and **Contact Notifications** grid on the workspace and expand the **User Detail** area.
2. Complete the user details for the user account.
3. Click **Save**.

View and Modify Contact Notifications

Users with the *Can Manage Users* permission can view all notifications that are associated with a contact.

1. In the navigation menu, select **Admin** > **Users/Contacts**.
2. On the **All Users/Contacts** tab, click **Users and Contacts** and then select one of the following options:
   - **Users and Contacts** - to display all users and contacts.
   - **Contacts** - to display only contacts.
3. Scroll to the contact and click to open the contact detail.
4. In the **Contact Notifications** grid, view the notifications which are associated with the contact. The notification type, building scope, and contact method (Email, Text, Voice) is displayed.

Contact Notifications

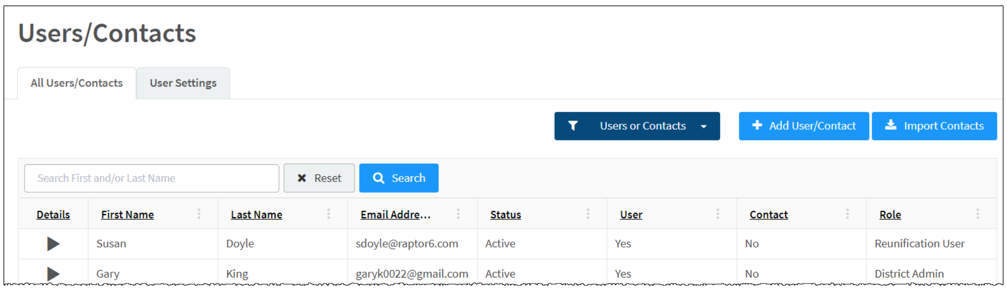
Type	Building Scope	Email	Text	Voice	Options
Sex Offender Alert	All Buildings	Yes	Yes	N/A	

5. If you would like to modify a method for notification (Email, Text or Voice), click the icon and select the appropriate check boxes.
6. You can only select a check box for a notification method specified in the **Contact Detail**. For example, if Voice was not selected as a method of notification, the check box will be disabled.
7. Click the icon to save your changes.

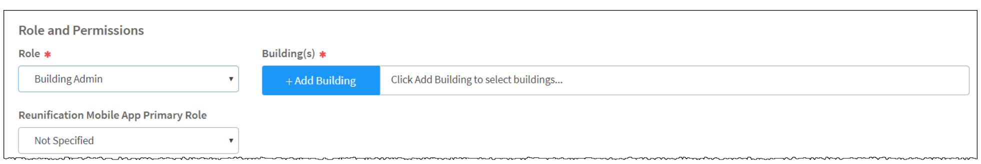
Modify User Role and Permissions

When users are added to Raptor, their role and permissions are set during the account creation. Administrators can modify user roles and permissions using the following procedure.

1. In the navigation menu, select **Admin > Users/Contacts**.



2. Enter the first or last name in the **Search** box for the user account or contact that you want to modify and then click **Search**.
3. Click the ▶ icon to view the **User/Contact Detail**.
4. Under **Role and Permissions**, select the **Role** to assign to the user account. See [Understanding User Accounts](#).

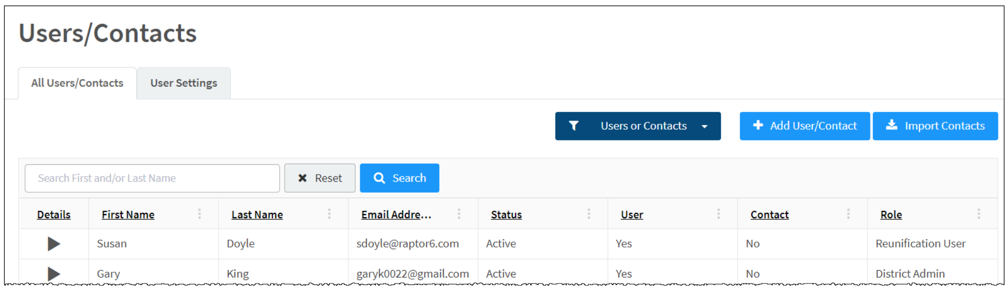


5. In the **Buildings** field, click **Add Building** and select the building from the drop-down list to specify the building to which the user has permission to view in Raptor. You can add multiple buildings if the role allows for this.
6. Select the check box next to each task that the user is granted permission.
7. Click **Save**.
8. If the user is logged in when their roles or permissions have been modified, they must log out of Raptor and then log in before the new roles and/or permissions take effect.

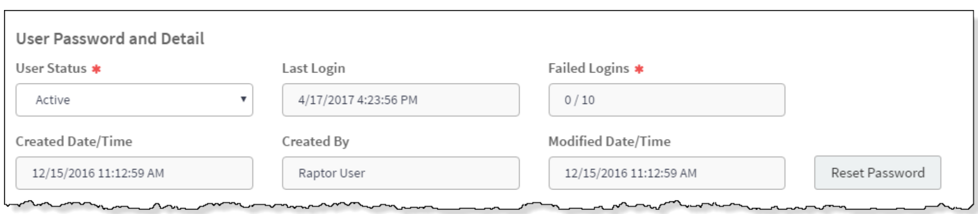
View User Password and Details

You can view details about the user account, such as when it was created or modified, the number of failed login attempts, and the last time the user logged into Raptor.

1. In the navigation menu, select **Admin > Users/Contacts**.



2. From the Building Selector, select the building or select **All Buildings** to display all users.
3. Enter the first or last name in the **Search** box for the user account or contact that you want to modify and then click **Search**.
4. Click the ▶ icon to expand the **User/Contact Detail**.



5. In the **User Password and Detail** area, view the following information:
   - **User Status*** - Status of the user account. You can change the status of the user account. See [Activate and Deactivate Users](#).
   - **Last Login** - Date and time the user last logged into Raptor.
   - **Failed Logins*** - Number of times the user has attempted to log in with invalid credentials.
   - **Reset Failed Logins** - This button displays when 1 or more failed log in attempts has been recorded. You can reset failed logins. Click **Reset Failed Logins** to reset the count to 0.
   - **Created Date/Time** - Date and time the user account was created.**Created By** - The user who created the user account.

- **Modified Date/Time** - Date and time the user account was last modified.
- **Reset Password** - You can reset the password for the user account from this area. See Reset Password.

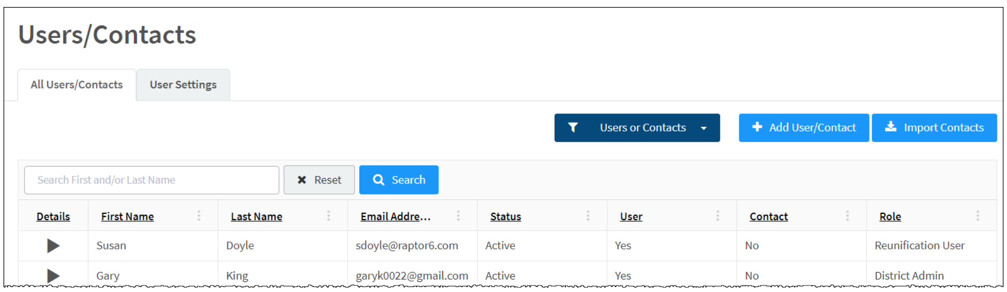
Activate and Deactivate Users

You can activate or deactivate a user account from the **User/Contact Detail** workspace.

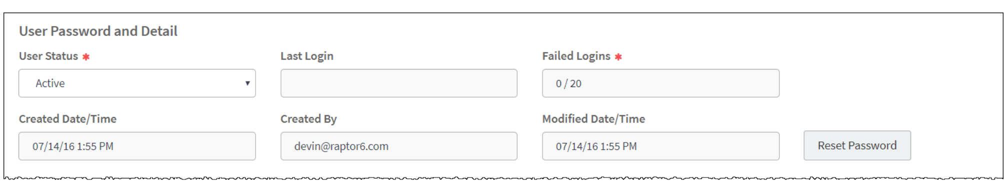
> **Note:**
> If a user account has been deactivated, the user will see a message "Your account has been locked, contact your administrator" when they attempt to log in.

Perform the following steps to activate and deactivate users:

1. In the navigation menu, select **Admin > Users/Contacts**.



2. From the Building Selector, select the building or select **All Buildings**.
3. Enter the first or last name in the **Search** box for the user account or contact that you want to modify and then click **Search**.
4. Click the ▶ icon to expand the **User/Contact Detail**and navigate to the **User Password and Detail** area.

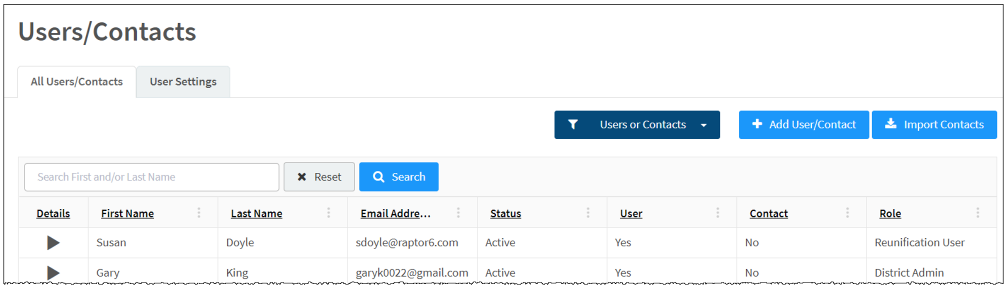


5. In the **User Status** field, select **Active** or **Deactivated** from the drop-down menu.
6. When you have completed your changes, click **Save**.

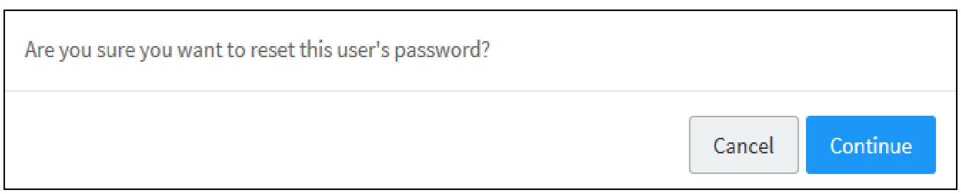
Reset Password

Administrators can reset a user's password from the **User/Contact Detail** workspace.

1. In the navigation menu, select **Admin > Users/Contacts**.



2. From the Building Selector, select the building or **All Buildings**.
3. Enter the first or last name in the **Search** box for the user account or contact whose password you want to reset and then click **Search**.
4. Click the ▶ icon to expand the details.
5. In the **User Password** and **Detail** area, click **Reset Password**.
6. On the confirmation dialog, click **Continue** to reset the password.



7. The system auto-generates a new password for the user. A drop-down message displays the changed password.
8. Click **OK**.

Maximum Failed Logins

In Raptor, there are two thresholds for locking user accounts after failed login attempts–a threshold set by the system and a threshold specified by the user.

The system threshold allows the user five consecutive failed login attempts before they are locked out of their account for 15 minutes. After three failed login attempts, a message will display warning the user that after five failed attempts, they will be locked out of their account. If they reach the threshold of five failed login attempts, the message *Your account has been locked for 15 minutes*, displays and they must wait 15 minutes before attempting to login again.

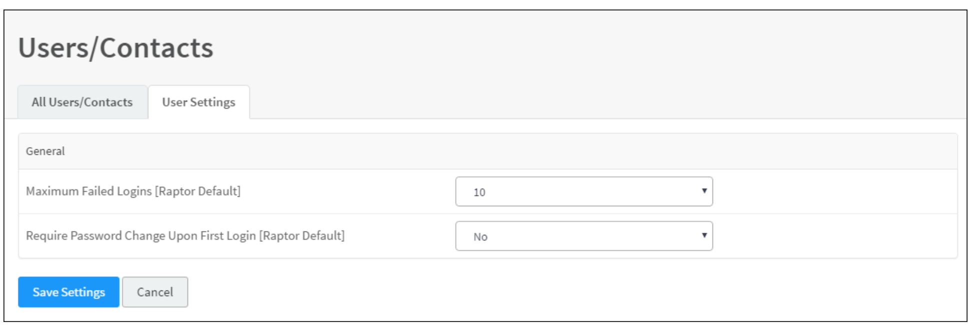
The second threshold is set on the **User Settings** tab and after the specified number of failed logins has been reached, they are locked out of their account and must contact an Administrator.

When either of the thresholds is reached, an appropriate message is written to the Logs. If a user successfully logs in before reaching either threshold, the number of failed logins is reset to 0/10.

Set Maximum Failed Logins

Perform the following steps to set the maximum number of failed logins that are allowed before locking the account:

1. From the navigation menu, select **Admin > Users/Contacts**.
2. Click the **User Settings** tab.



3. From the **Maximum Failed Logins** drop-down list, select the number of failed login attempts that are allowed before the user account is locked and must be reset by an Administrator. By default, the number of attempts is set to 10.

> **Note:**
> If this setting is 5 or less, only the user specified threshold will be active, and the user will be locked out of their account and must contact an Administrator. Also, the system will not

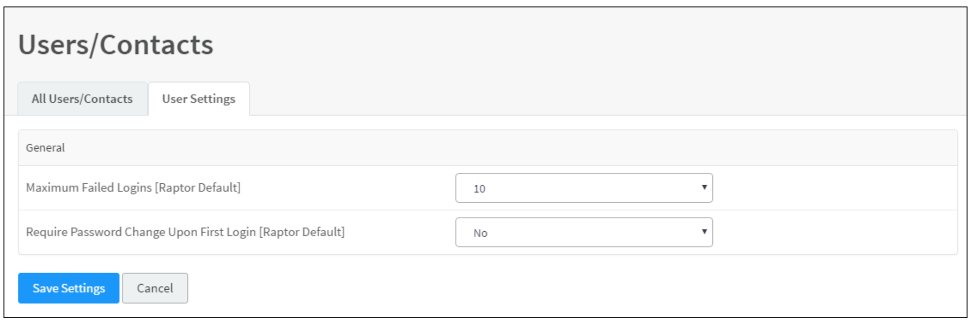
report the number of failed login attempts in the Logs.

4. Click **Save Settings**.

Require Password Change Upon First Login

Users with the *Can Manage Users* permission can specify whether to require a new user to change their password after their first login to Raptor.

1. From the navigation menu, select **Admin > Users/Contacts**.
2. Click the **User Settings** tab.



3. In the **Require Password Change Upon First Login** field, select **Yes** (to enable) or **No** (to disable). The default setting is **No**.
4. Click **Save Settings**.

Enable or Disable New User Training Videos

If enabled, when a new user logs into Raptor, a training video is displayed introducing the user to Raptor. These videos are controlled by the District Administrator. Users are required to watch the entire video before continuing into the Raptor system.

The **User Education** grid on the **User Settings** tab of the **Users/Contacts** workspace is used to enable or disable the training videos that are displayed upon login.

User Education

Description	User Role(s)	Enabled	Options
New user Training Video	Entry Admin	Yes	
User Training Video for Building Admin	Building Admin	No	
User Training Video for BVC and BRA	Building Reunification Admin, Building Volunteer Coordinator	No	
User Training video for District Admin	District Admin, District Reunification Admin, District Volunteer Coordinator, Security Officer, Student Admin	Yes	

Perform the following steps to enable or disable a training video:

1. In the navigation menu, select **Admin > Users/Contacts**.
2. Click the **User Settings** tab.
3. In the **User Education** grid, click the icon for the training video you want to enable or disable.

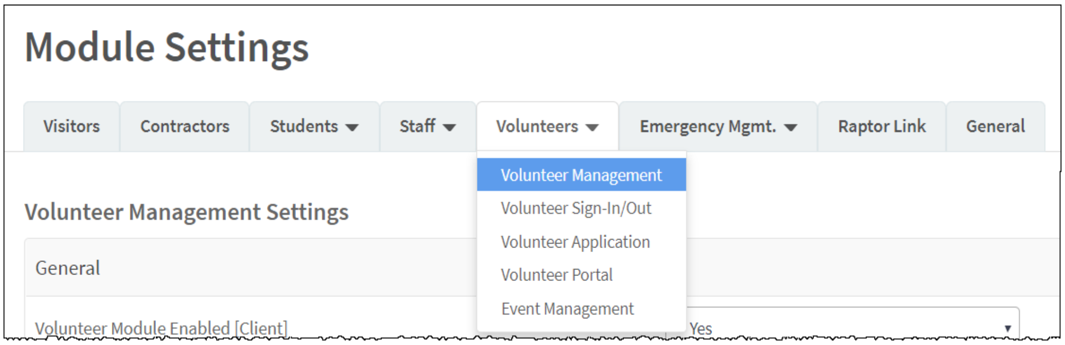
   User Education

Description	User Role(s)	Enabled	Options
New user Training Video	Entry Admin		

4. In the **Enabled** column, select (to enable) or clear (to disable) the check box.
5. Click the icon to save your changes. If you want to discard your changes, click the icon.

Managing Volunteer Module Settings (Admin)

Use the **Volunteers** tab on the **Module Settings** workspace to manage the fields that display in the **Volunteer** module.

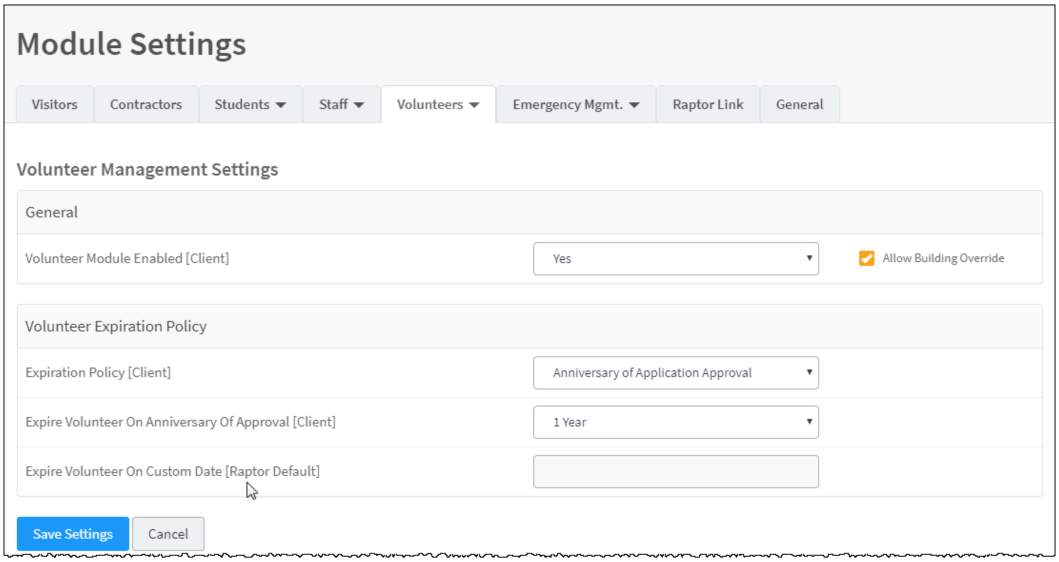


The **Volunteers** tab includes a drop-down menu where you can select the workspace in which you want to navigate:

- Volunteer Management Settings - This workspace is used to manage what displays on the **Volunteer** workspace, including volunteer expiration policy, functions, organizations, affiliations, and custom profile fields.
- Volunteer Sign-In/Sign-Out Settings - This workspace is used manage volunteer sign-in and sign-out settings, and custom sign in fields.
- Volunteer Application Settings - This workspace is available is used to manage volunteer application settings, notifications and customize online volunteer application features.
- Volunteer Portal Settings - This workspace is used to manage the volunteer portal settings.
- Event Management Settings - This workspace is used to enable volunteer event management.

Volunteer Management Settings

The **Volunteer Management Settings** workspace is used to manage what displays on the **Volunteer** workspace, including volunteer expiration policy, functions, organizations, affiliations, and custom profile fields.



From the **Volunteer Management Settings** workspace, you can:

- Enable/Disable Volunteer Module
- Specify Volunteer Expiration Policy
- Manage Notifications
- Manage Functions
- Manage Required Documents
- Manage Requirements
- Manage Organizations
- Manage Affiliations
- Manage Custom Profile Fields

Enable or Disable Volunteer Module

By default, Raptor is configured with the Volunteer Module enabled, however, the module can be disabled to hide Volunteer features in the navigation menu, including Volunteer Reports, Volunteer Sign In/Sign Out, and the Volunteer dashboards.

> **Note:**
> If you disable the Volunteer Module, all associated features will also be disabled (Volunteer Management, Volunteer Sign In/Out, Volunteer Application, Volunteer Events, and Volunteer Portal). Subsequently, when you enable the Volunteer Module, you will then need to enable all the other features that were previously disabled.

Perform the following steps to enable or disable the Volunteer Module:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Management** from the drop-down menu.
3. In the **Volunteer Module Enabled** field, select **Yes** (to enable) or **No** (to disable) from the drop-down list.
4. Select the **Allow Building Override** check box if the setting can be overridden at the building level. Otherwise, clear the check box.
5. Click **Save Settings**.
6. Log out of Raptor and then log in to see the change.

Specify Volunteer Expiration Policy

Users with Administrative permissions can specify when a volunteer's ability to volunteer for functions will automatically expire, at which time they will be required to resubmit a volunteer application.

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Management** from the drop-down menu.
3. In the **Volunteer Expiration Policy** area, specify the following information:
   - **Expiration Policy** - Select one of the following options from the drop-down list to specify how the expiration policy will be implemented:
     - **None** - No expiration policy will be set for volunteers. If this option is selected, the **Expire Volunteer on Anniversary Of Approval** and **Expire Volunteer On Custom Date** fields will be disabled (grayed out).

        - **Anniversary of Application Approval** - If this option is selected, volunteers will be expired on the anniversary date of application approval. You must select the anniversary year in the **Expire Volunteer On Anniversary of Approval** field.
    - **Custom Date** - Select this option to be able to select a date from the calendar in the **Expire Volunteer On Custom Date** field to specify the expiration policy.
    - **Expire Volunteer On Anniversary Of Approval** - This field is enabled if the **Expiration Policy** is set to **Anniversary of Application Approval**. From the drop-down list, select the anniversary year on which to expire the volunteer. By default, the expiration is set to 1 Year.
    - **Expire Volunteer On Custom Date** - This field is enabled if the **Expiration Policy** is set to **Custom Date**. From the calendar icon, select the date on which to expire all volunteers.
4. Click **Save Settings**.
5. Log out of Raptor and then log in to see the change.

Notification Management – Volunteer Management

You can manage volunteer notifications from **Notification Management** grid on the **Volunteer Management Settings** workspace. The following notifications are available:

- **Initial Expiration Reminder** - This notification will be sent to a volunteer as a first reminder that their term as a volunteer will expire.
- **Final Expiration Reminder** - This notification will be sent to a volunteer as a final reminder that their term as a volunteer will expire.
- **Volunteer is Banned** - This notification will be sent to associated contacts when a volunteer's privileges have been revoked.

Notification Management

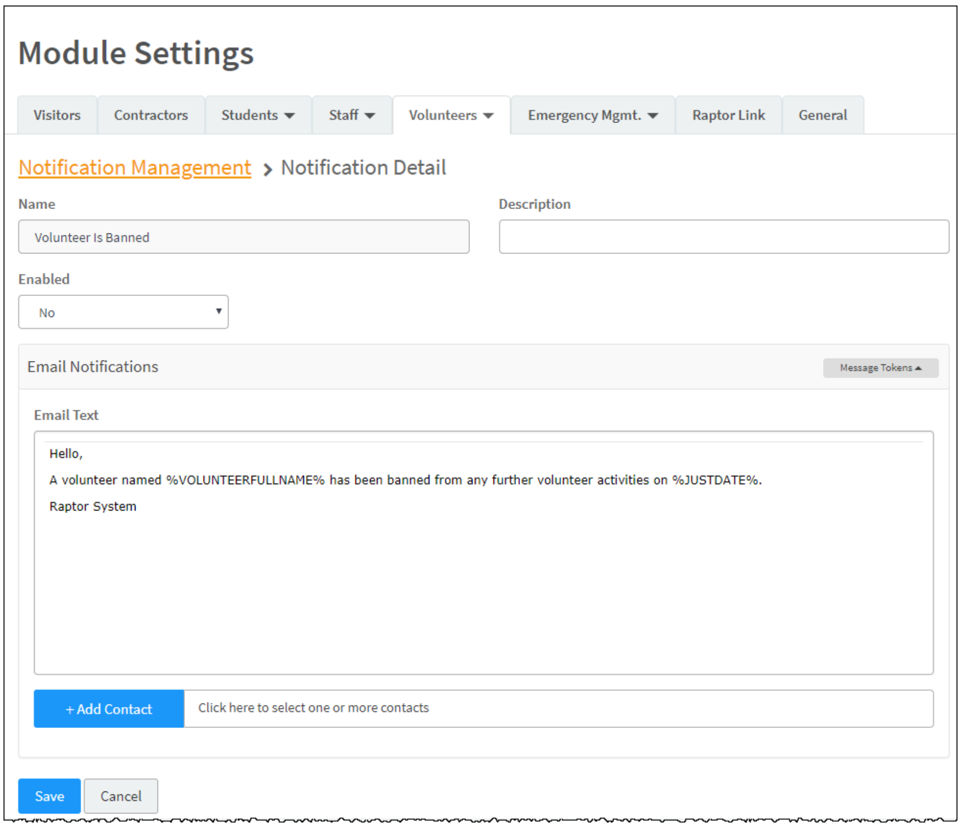
Details	Name	Recipient	Building Scope	Enabled
▶	Initial Expiration Reminder	Volunteer	All Buildings	No
▶	Final Expiration Reminder	Volunteer	All Buildings	No
▶	Volunteer Is Banned	Client Contacts	All Buildings	No

> **Note:**
> Notifications can only be managed at the client level (All Buildings).

Specify Volunteer Management Notifications

Perform the following steps to specify the details of the volunteer management notifications:

1. In the navigation menu, select **Admin > Module Settings.**
2. Click the **Volunteers** tab and select **Volunteer Management** from the drop-down menu.
3. In the **Notification Management** area, click the ▶ icon in the **Details** column to expand the **Notification Detail**.



4. Specify the following information:
   - **Name** - This field is read-only and cannot be changed.
   - **Description** - Enter an optional description about the notification.
   - **Enabled** - Select **Yes** or **No** to indicate whether the notification is enabled (active).
   - **Send Days Prior To Expiration** - Select the number of days the notification is to be sent prior to the volunteer's expiration date.

- **Email Text** - The email message is pre-populated with a default message using message tokens, but you can change this message if desired. To use message tokens to compile the message, see "Message Tokens for Volunteer Notifications" below

5. Click **Save**.

Message Tokens for Volunteer Notifications

You can also use Message Tokens, which are variables, in the notification message so that when the message is sent, the tokens will be replaced by their associated value.

Click **Message Tokens** to view the variables that can be entered in the message. The tokens that are displayed depend on the selected notification.

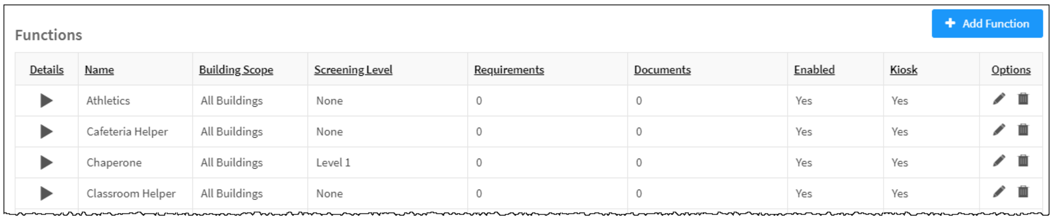
%CLIENTNAME% - District Name
%JUSTDATE% - Date Logged - MM/DD/YYYY
%EXPIRATIONDATE% - Date Volunteer's Term Expires
%ONLINEAPPLICATIONURL% - English or Spanish URL
%VOLUNTEERFULLNAME% - Volunteer's First and Last Name

Example:

A volunteer named %VOLUNTEERFULLNAME% has been banned from any further volunteer activities on %JUSTDATE%.

Manage Functions

You can view and manage the functions that display during volunteer sign in from the **Functions** grid on the **Volunteer Management Settings** workspace.

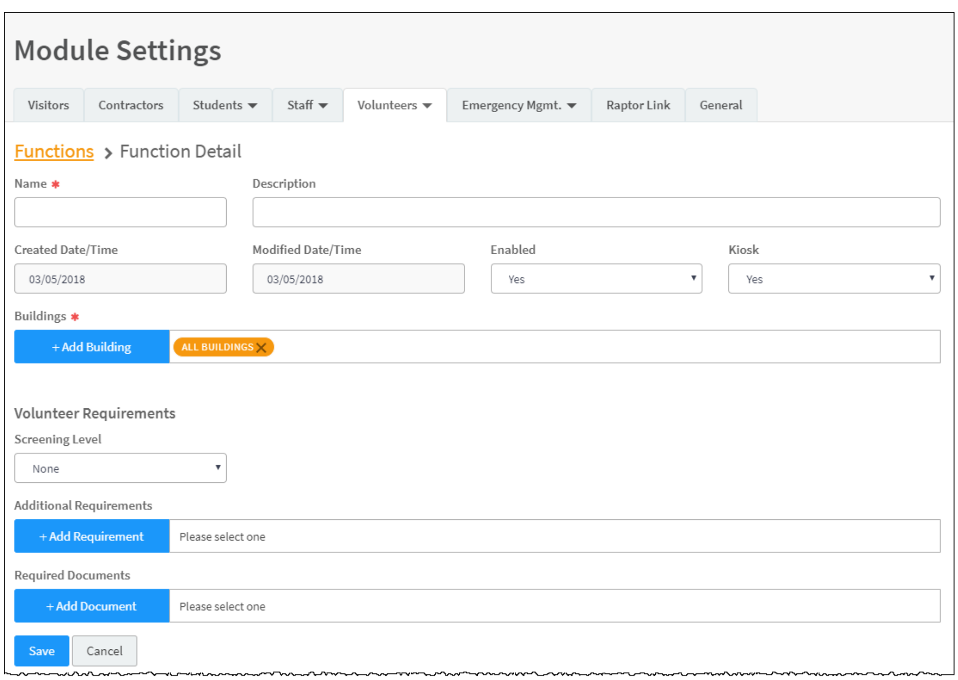


> **Note:**
> Functions can only be managed at the client level (All Buildings).

Add Function

Perform the following steps to add a new function to display in the drop-down list during volunteer sign in:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Management** from the drop-down menu.
3. In the **Functions** grid, click **Add Function**.



4. Enter a **Name*** and **Description** for the function.
5. Perform the following depending on how you want the function to display in the **Volunteer Sign In** workspace:
   - **Enabled** - Select **Yes** (to enable) or **No** (to disable) to specify whether the item is currently enabled or disabled. This field is set to **Yes** by default.
   - **Kiosk** - Select **Yes** (to enable) or **No** (to disable) to specify whether the item is available in the Kiosk. This field is set to **Yes** by default.
6. In the **Buildings*** field, click **Add Building** and select the building or building group from the drop-down list. To delete a building, click the **X** on the building label.
7. In the **Screening Level** field, select the criminal background screening level required for the function (None, Level 1, Level 2 or Level 3).

> **Note:**
> Criminal background screening can only be accomplished on volunteer applications received from the online volunteer application and not with imported applications or applications that are created by users.

8. In the **Additional Requirements** field, click **Add Requirement** and select the requirement(s) associated with the function.

> **Note:**
> To use this feature, one or more requirements must already be created. See Manage Requirements.

9. In the **Required Documents** field, click **Add Document** and select the required document(s) associated with the function.

> **Note:**
> To use this feature, one or more required documents must already be created. See Manage Required Documents.

10. Click **Save**.

Modify Function

1. You can edit or remove a function, enable or disable, or change the setting for whether it displays in the Kiosk.
2. In the navigation menu, select **Admin > Module Settings**.
3. Click the **Volunteers** tab and select **Volunteer Management** from the drop-down menu.

4. In the **Functions** grid, click the ▶ icon to expand the **Function Detail** and modify any of the following information:
   - **Name*** - Modify the name of the function.
   - **Description** - Modify the description for the function.
   - **Enabled** - Select **Yes** (to enable) or **No** (to disable) to specify whether the item is currently enabled or disabled.
   - **Kiosk** - Select **Yes** (to enable) or **No** (to disable) to specify whether the item is available in the Kiosk.
   - **Buildings*** - To add a building or building group, click **Add Building** and select the building or building group from the drop-down list. To delete a building, click the **X** on the building label.
   - **Screening Level** - Select the criminal background screening level required for the function (None, Level 1, Level 2 or Level 3).

   > **Note:**
   > - When the criminal background screening feature is disabled, the only option available is None.
   > - Criminal background screening can only be done on volunteer applications received from the online volunteer application and not with imported applications or applications that are created by users.

   - **Additional Requirements** - Click **Add Requirement** and select the requirement (s) associated with the function.
   - **Required Documents** - Click **Add Document** and select the required document (s) associated with the function.
5. Click **Save**.

You can also click the ✎ icon in the **Options** column in the **Functions** grid on the **Volunteer Management Settings** workspace to edit the **Name** and enable/disable the **Kiosk** setting and the **Enable**d setting. Click the ✔ icon to save your changes. If you want to discard your changes, click the ✖ icon.

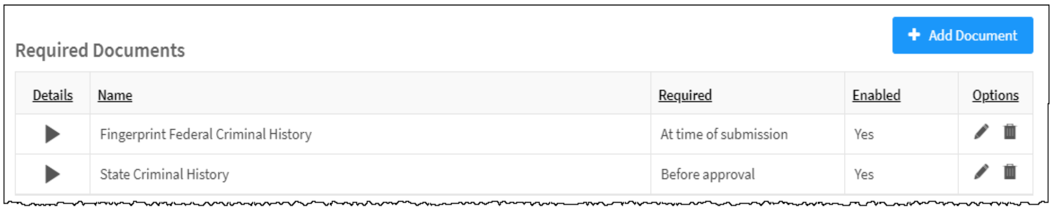
Delete Function

Perform the following steps to delete a function:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Management** from the drop-down menu.
3. Navigate to the **Functions** grid and click the 🗑 icon for the functiond to be deleted.
4. Click **OK** on the confirmation dialog.

Manage Required Documents

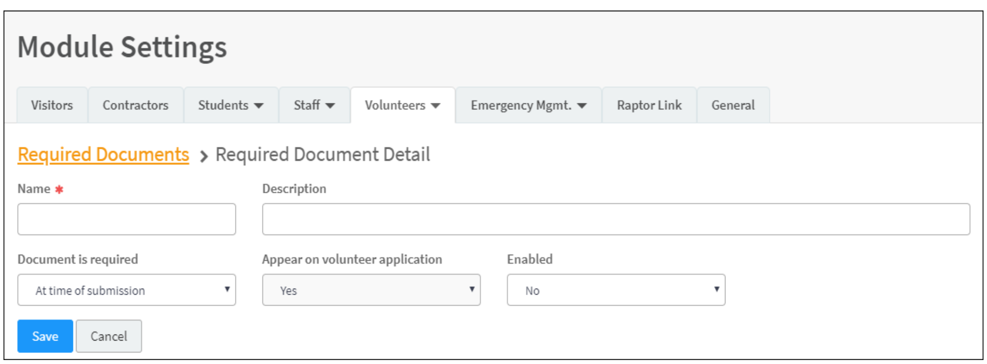
The **Required Documents** grid on the **Volunteer Management Settings** workspace is used to view and manage required documents that volunteers must provide prior to approval. The required documents can be displayed on the volunteer application and can be associated to functions.



Add Required Document

Perform the following steps to add a new required document to associate with a volunteer application:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Management** from the drop-down menu.
3. In the **Required Documents** grid, click **Add Document**.



4. Specify the following information:
   - **Name*** - Enter a name for the required document.
   - **Description** - Optionally, enter a description of the document.
   - **Document is required** - Select when the document must be provided (**At time of submission** or **Before Approval**).
   - **Appear on volunteer application** - Select **Yes** or **No** to indicate whether this

required document should be displayed on the volunteer application.

- **Enabled** - Select **Yes** (to enable) or **No** (to disable) to specify whether the required document is currently enabled or disabled.

5. Click **Save**.

Modify Required Document

You can edit the required document name, when it is required, and if the required document is enabled or disabled.

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Management** from the drop-down menu.
3. In the **Required Documents** grid, click the ✎ icon in the **Options** column to modify any of the following information:
   - **Name*** - Modify the name of the required document.
   - **Required** - Select when the document must be provided (**At time of submission** or **Before Approval**).
   - **Enabled** - Select **Yes** (to enable) or **No** (to disable) to specify whether the required document is currently enabled or disabled.
4. Click the ✔ icon to save your changes. If you want to discard your changes, click the ✖ icon.

Delete Required Document

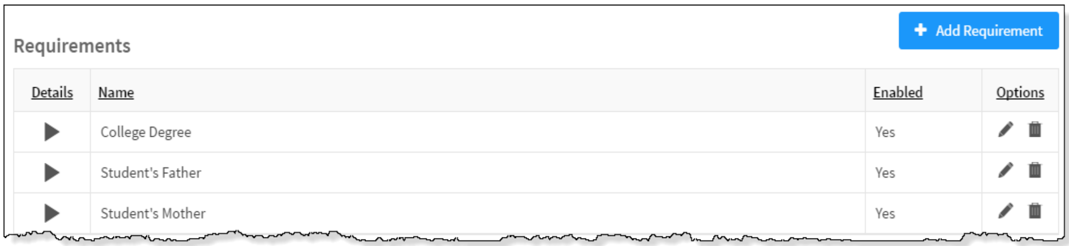
Perform the following steps to remove a required document:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Management** from the drop-down menu.
3. In the **Required Documents** grid, click the 🗑 icon in the **Options** column to delete a required document.
4. Click **OK** on the confirmation dialog.

> **Note:**
> A warning message displays if you attempt to delete a required document that is associated with one or more functions.

Manage Requirements

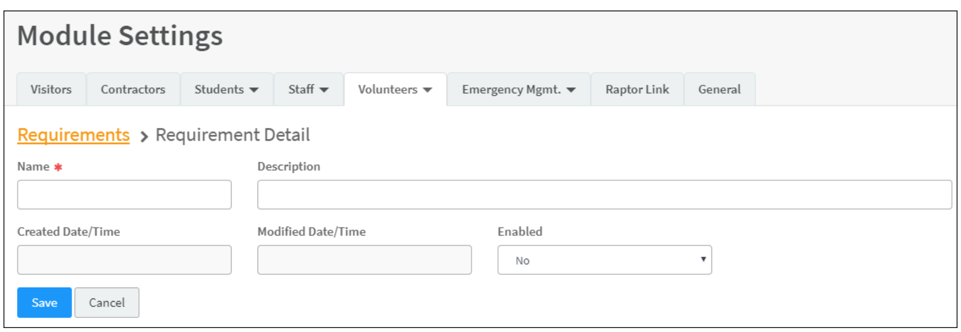
The **Requirements** grid on the **Volunteer Management Settings** workspace is used to view and manage requirements that can be associated to functions and displayed during the application approval process.



Add Requirement

Perform the following steps to add a new requirement to associate with a function:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Management** from the drop-down menu.
3. In the **Requirements** grid, click **Add Requirement**.



4. Enter a **Name*** and **Description** for the requirement.
5. In the **Enabled** field, select **Yes** (to enable) or **No** (to disable) to specify whether the requirement is currently enabled or disabled.
6. Click **Save**.

Modify Requirement

Perform the following steps to modify a requirement:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Management** from the drop-down menu.

3. In the **Requirements** grid, click the ▶ icon to expand the **Requirement Detail**.
4. Modify any of the following information:
   - **Name*** - Modify the name of the requirement.
   - **Description** - Modify the description for the requirement.
   - **Enabled** - Select **Yes** (to enable) or **No** (to disable) to specify whether the requirement is currently enabled or disabled.
5. Click **Save**.

You can also click the icon in the **Options** column in the **Requirements** grid on the **Volunteer Management Settings** workspace to edit the **Name** and the **Enabled** setting. Click the ✔ icon to save your changes. If you want to discard your changes, click the icon.

Delete Requirement

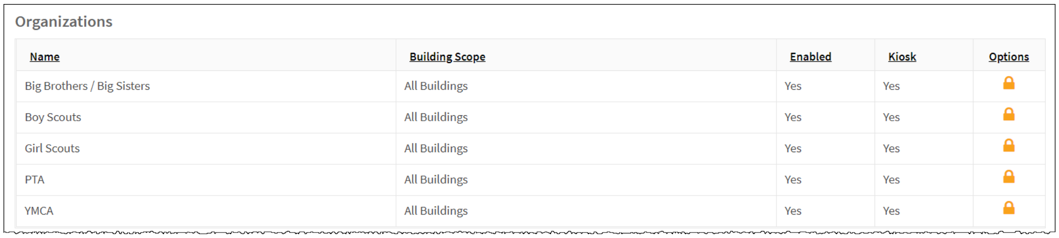
Perform the following steps to remove a requirement:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Management** from the drop-down menu.
3. In the **Requirements** grid, click the icon to delete the requirement.
4. Click **OK** on the confirmation dialog.

> **Note:**
> A warning message displays if you attempt to delete a requirement that is associated with one or more functions.

Manage Organizations

When a volunteer signs in, the **Organization** drop-down list is one of the fields that is displayed. This field indicates the organization who the volunteer is representing in the Raptor system. You can view and manage the organizations that display during volunteer sign in from the **Organizations** grid on the **Volunteer Management Settings** workspace.



Organizations

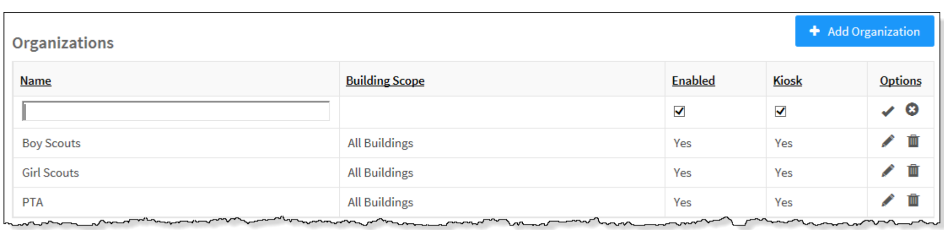
Name	Building Scope	Enabled	Kiosk	Options
Big Brothers / Big Sisters	All Buildings	Yes	Yes	
Boy Scouts	All Buildings	Yes	Yes	
Girl Scouts	All Buildings	Yes	Yes	
PTA	All Buildings	Yes	Yes	
YMCA	All Buildings	Yes	Yes	

> **Note:**
> Organizations can only be managed at the client level (All Buildings).

Add Organization

Perform the following steps to add a new organization to display in the drop-down list during volunteer sign in:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Management** from the drop-down menu.
3. In the **Organizations** grid, click **Add Organization**.



Organizations

+ Add Organization

Name	Building Scope	Enabled	Kiosk	Options
		☑	☑	
Boy Scouts	All Buildings	Yes	Yes	
Girl Scouts	All Buildings	Yes	Yes	
PTA	All Buildings	Yes	Yes	

4. Enter a **Name** for the organization in the text field.
5. Perform the following depending on how you want the organization to display in the **Volunteer Sign In** workspace:
   - **Enabled** - This field is selected by default. If you want the organization to display on the **Sign In** workspace, leave the check box selected. Otherwise, clear the check box.

- **Kiosk** - If you want the organization to display on the Kiosk, leave the check box selected. Otherwise, clear the check box.

6. Click the ✔ icon to save the new organization. If you want to discard your changes, click the ✖ icon.

Modify Organization

You can edit an organization, enable or disable it, or change the setting for whether it displays in the Kiosk. Perform the following steps to modify an organization:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Management** from the drop-down menu.
3. In the **Organizations** grid, click the ✎ icon and modify the following information:
   - **Name** - Modify the name of the organization.
   - **Enabled** - Select the check box (to enable) or clear the check box (to disable).
   - **Kiosk** - Select the check box (to enable) or clear the check box (to disable) the organization on the Kiosk.
4. Click the ✔ icon to save the organization. If you want to discard your changes, click the ✖ icon.

Delete Organization

Perform the following steps to delete an organization:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Management** from the drop-down menu.
3. In the **Organizations** grid, click the 🗑 icon to delete the organization.
4. Click **OK** on the confirmation dialog.

Manage Affiliations

You can view and manage the affiliations that display on the **Volunteer Application** or in the **Volunteer Detail** from the **Affiliations** grid on the **Volunteer Management Settings** workspace. This field indicates the relationship of the person to a student who attends the school (for example, mother, father, or uncle).

Affiliations

Name	Building Scope	Enabled	Kiosk	Options
Aunt	All Buildings	Yes	Yes	
Brother	All Buildings	Yes	Yes	
Business Partner	All Buildings	Yes	Yes	
Community Member	All Buildings	Yes	Yes	

> **Note:**
> Affiliations can only be managed at the client level (All Buildings).

Add Affiliation

Perform the following steps to add a new affiliation to display in the drop-down list during volunteer sign in:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Management** from the drop-down menu.
3. In the **Affiliations** grid, click **Add Affiliation**.

Affiliations — + Add Affiliation

Name	Building Scope	Enabled	Kiosk	Options
		☑	☑	
Parent	All Buildings	Yes	Yes	
PTA	All Buildings	Yes	Yes	

4. Enter a **Name** for the affiliation in the text field.
5. Perform the following depending on how you want the affiliation to display in the **Volunteer Sign In** workspace:
   - **Enabled** - This field is selected by default. If you want the affiliation to display on the **Sign In** workspace, leave the check box selected. Otherwise, clear the check box.
   - **Kiosk** - This checkbox is selected by default. If you want the affiliation to display on the Kiosk, leave the check box selected. Otherwise, clear the check box.

6. Click the ✔ icon to save the new affiliation. If you want to discard your changes, click the ✖ icon.

Modify Affiliation

You can modify an affiliation, enable or disable it, or change the setting for whether it displays in the Kiosk. Perform the following steps to modify an affiliation.

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Management** from the drop-down menu.
3. In the **Affiliations** grid, click the ✎ icon and modify the following information:
   - **Name** - Modify the name of the affiliation.
   - **Enabled** - Select the check box (to enable) or clear the check box (to disable).
   - **Kiosk** - Select the check box (to enable) or clear the check box (to disable).
4. Click the ✔ icon to save the affiliation. If you want to discard your changes, click the ✖ icon.

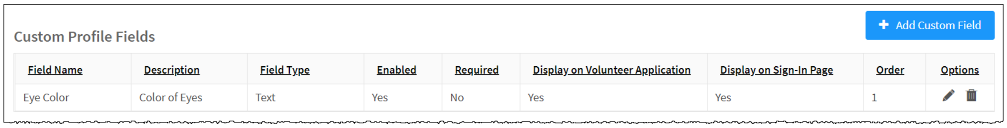
Delete Affiliation

Perform the following steps to remove an affiliation:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Management** from the drop-down menu.
3. In the **Affiliations** grid, click the 🗑 icon for the affiliation to be removed.
4. Click **OK** on the confirmation dialog.

Manage Custom Profile Fields

A custom profile field is associated with the volunteer (such as eye color) and this information is displayed on the **Volunteer Detail** workspace. If necessary, it may also be configured to display on the **Sign In/Sign Out** workspace.



Custom Profile Fields

+ Add Custom Field

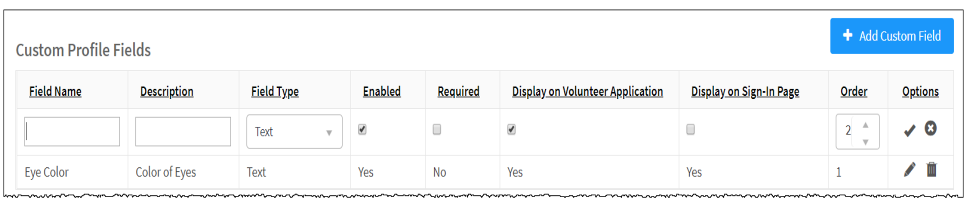
Field Name	Description	Field Type	Enabled	Required	Display on Volunteer Application	Display on Sign-In Page	Order	Options
Eye Color	Color of Eyes	Text	Yes	No	Yes	Yes	1	

> **Note:**
> A volunteer custom profile field is automatically added to the volunteer application and the online volunteer application.

Add Custom Profile Field

Perform the following steps to add a custom profile field:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Management** from the drop-down menu.
3. In the **Custom Profile Fields** grid, click **Add Custom Field**.



Custom Profile Fields

+ Add Custom Field

Field Name	Description	Field Type	Enabled	Required	Display on Volunteer Application	Display on Sign-In Page	Order	Options
		Text					2	
Eye Color	Color of Eyes	Text	Yes	No	Yes	Yes	1	

4. Enter the **Field Name** and **Description** in the text boxes.
5. From the **Field Type** drop-down list, select the type of field (Lookup, Text, Text Area).
6. Select or clear the **Enabled** check box.
7. If this is a required field that must be completed during volunteer sign in, select the **Required** check box.
8. Select the **Display on Volunteer Application** check box if you want the field to be visible to the volunteer applicant on the Volunteer Application. The custom profile field only displays on the Volunteer Application if the check box is selected, otherwise it is hidden from the applicant.

9. Select the **Display on Sign-In Page** check box if you want the field to display on the **Sign In** workspace. The custom profile field will only display on the **Sign In** workspace if the check box is selected. The field displays as *read-only* unless using the manual entry feature.
10. In the **Order** column, specify the order in which the custom profile field displays on the on the **Volunteer Detail** workspace, the **Personal Information** page of the online volunteer application, and the **Application Detail** workspace. By default, the fields appear in the order in which they were created.

> **Note:**
> You must edit each custom profile field to change the sequence order.

11. Click the icon to save the newly created custom field. If you want to discard your changes, click the icon.
12. If the **Lookup** field type is selected, click **Manage Values** to specify the **Lookup Values** for the field.
13. Click **Add Lookup Value**, enter the **Value** in the text field and click the icon to save it.

Modify Custom Profile Field

Perform the following steps to modify a custom profile field:
In the navigation menu, select **Admin > Module Settings**.

1. Click the **Volunteers** tab and select **Volunteer Management** from the drop-down menu.
2. In the **Custom Profile Fields** grid, click the icon and edit any of the information.

3. Click the icon to save your changes. If you want to discard your changes, click the icon.

Delete Custom Profile Field

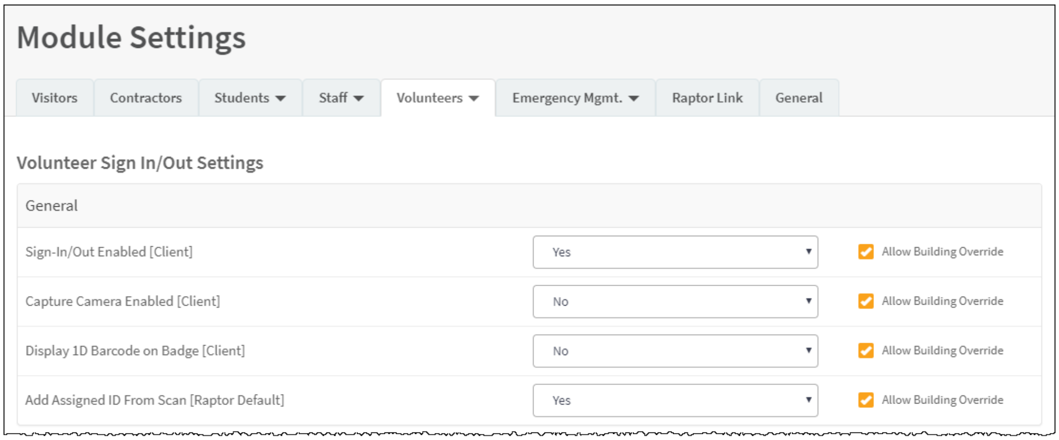
Perform the following steps to delete a custom profile field:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Management** from the drop-down menu.

3. In the **Custom Profile Fields** grid, click the icon to delete the custom profile field.
4. Click **OK** on the confirmation dialog.

Volunteer Sign-In and Sign-Out Settings

The **Volunteer Sign-in/Out Settings** workspace includes settings for sign-in and sign-out activities.



From the **Volunteer Sign-In/Out Settings** workspace, you can:

- Enable/Disable Volunteer Sign In/Out
- Enable/Disable Capture Camera
- Add Assigned ID From Scan
- Display 1D Barcode on Badge
- Specify Sign-In Settings
- Specify Auto Sign-Out Time
- Manage Custom Sign-In Fields

Enable or Disable Volunteer Sign In/Out

By default, Raptor is configured with the **Volunteer Sign In/Out** feature enabled. The feature can be disabled to hide Volunteer Sign In and Sign Out features in the **Sign In/Sign Out** workspace.

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Sign In/Out** from the drop-down menu.
3. From the **Sign In/Out Enabled** drop-down list, select **Yes** (to enable) or **No** (to disable).
4. Select the **Allow Building Override** check box if the setting can be overridden at the building level. Otherwise, clear the check box.

5. Click **Save Settings**.
6. Log out of Raptor and then log in to see the change.

Enable or Disable Capture Camera

You use this setting to enable or disable the camera feature on the **Sign In/Sign Out** workspace. By default, this setting is disabled.

> **Note:**
> - A camera is required to use this feature.
> - If you are using a Windows Internet Explorer (IE) browser, you must have Adobe Flash Player installed to use the Capture Camera feature.

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Sign In/Out** from the drop-down menu.
3. In the **Camera Capture Enabled** field, select **Yes** (to enable) or **No** (to disable) from the drop-down list.
4. Select the **Allow Building Override** check box if the setting can be changed at the building level. Otherwise, clear the check box.
5. Click **Save Settings**.
6. Log out of Raptor and then log in to see the change.

Add Assigned ID From Scan

Users with the *Can Manage Volunteer Settings* permission can specify whether to allow a 1D barcode to be captured from a volunteer's ID card and populated in the **Assigned ID** field for that volunteer.

Perform the following steps to enable or disable this feature:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Sign In/Out** from the drop-down menu.
3. In the **Add Assigned ID From Scan** field, select **Yes** (to enable) or **No** (to disable) from the drop-down list.
4. Select the **Allow Building Override** check box if the setting can be overridden at the building level. Otherwise, clear the check box.
5. Click **Save Settings**.
6. Log out of Raptor and then log in to see the change.

Display 1D Barcode on Badge

Users with Administrative permissions can control whether a 1D barcode is printed on the volunteer badge. If the 1D barcode is printed on the badge, the volunteer can simply scan the code on their badge when signing out at the front desk or kiosk.

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Sign In/Out** from the drop-down menu.
3. In the **Display 1D Barcode on Badge** field, select **Yes** (to enable) or **No** (to disable) from the drop-down list.
4. Select the **Allow Building Override** check box if the setting can be overridden at the building level. Otherwise, clear the check box.
5. Click **Save Settings**.
6. Log out of Raptor and then log in to see the change.

Specify Sign-In Settings

Users with Administrative permissions can specify the fields that are required to be completed during volunteer sign in.

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Sign In/Out** from the drop-down menu.
3. Specify whether the following field is required to be completed during sign in and whether individual buildings can override these settings:
   - **Volunteer Can Sign In to Any Building** - Select **Yes** or **No** from the drop-down list to specify whether the Find search returns the volunteers name when they sign into any building in the district; not just those buildings listed on their volunteer application.
   - **Require Sign-In Organization** - Select **Yes** or **No** from the drop-down list to specify whether an organization is required during volunteer sign in.
   - **Allow Building Override** - Select or clear the check box for each of the fields. If selected, the settings can be overridden at the building level. Otherwise, clear the check boxes.
4. Click **Save Settings**.
5. Log out of Raptor and then log in to see the change.

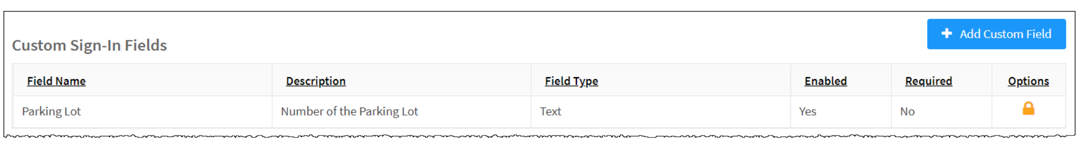
Specify Auto Sign-Out Time

By default, Raptor is configured to automatically sign out all volunteers at 6:00 PM. Users with Administrator permissions can change this time and specify whether the setting can be changed at the building level.

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Sign In/Out** from the drop-down menu.
3. In the **Auto Sign-Out Time** field, click the icon and select the time from the drop-down list.
4. Select the **Allow Building Override** check box if the setting can be overridden at the building level. Otherwise, clear the check box.
5. Click **Save Settings**.
6. Log out of Raptor and then log in to see the change.

Manage Custom Sign-In Fields

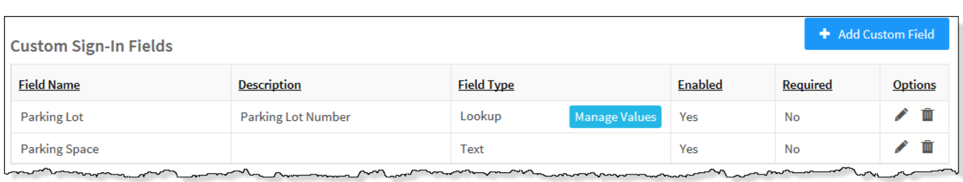
You can create custom sign-in fields that are associated with sign-in events (such as Parking Space) to display on the **Volunteer Sign In** and **Volunteer Delayed Entry** workspaces for all buildings or specific buildings.



Add Custom Sign-In Field

Perform the following steps to add a custom sign-in field:

1. In the navigation menu, select **Admin > Module Settings**.
2. On the **Volunteers** tab, click the drop-down menu and select **Volunteer Sign In/Sign Out**.
3. In the **Custom Sign-In Fields** grid, click **Add Custom Field**.



4. Enter the **Field Name** and **Description** in the text fields.
5. From the **Field Type** drop-down list, select the type of field (Lookup, Text, Text Area).

6. Select or clear the **Enabled** check box.
7. If this is a required field that must be completed during volunteer sign in, select the **Required** check box.
8. Click the ✔ icon to save the newly created custom field. If you want to discard your changes, click the ✖ icon.
9. If the **Lookup** field type is selected, click **Manage Values** to specify the **Lookup Values** for the field.
10. Click **Add Lookup Value**, enter the **Value** in the text field and click ✔ to save it.

Modify Custom Sign-In Fields

Perform the following steps to modify a custom sign-in field:

1. In the navigation menu, select **Admin > Module Settings**.
2. On the **Volunteers** tab, click the drop-down menu and select **Volunteer Sign In/Sign Out**.
3. In the **Custom Sign-In Fields** grid, click the ✏ icon and modify any of the fields.
4. Click the ✔ icon the save your changes. If you want to discard your changes, click the ✖ icon.

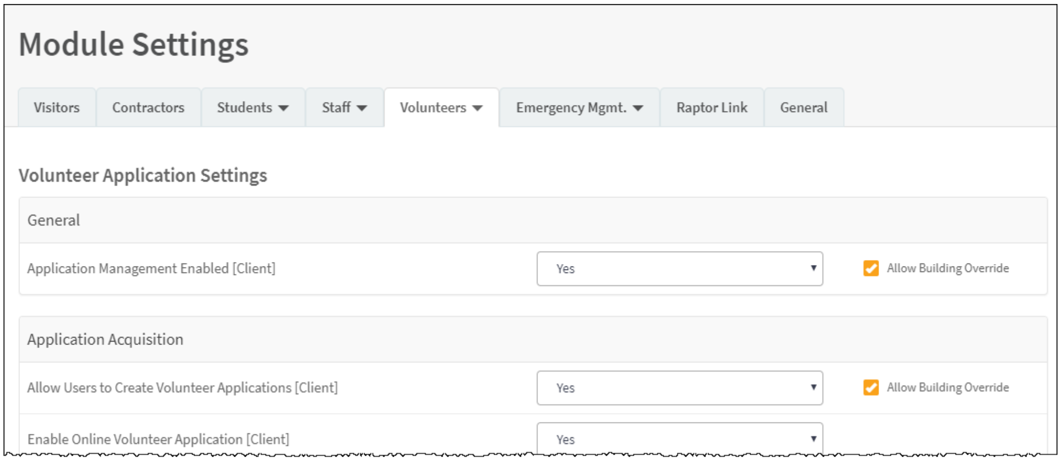
Delete Custom Sign-In Field

Perform the following steps to delete a custom sign-in field:

1. In the navigation menu, select **Admin > Module Settings**.
2. On the Volunteers tab, click the drop-down menu and select **Volunteer Sign In/Sign Out**.
3. In the **Custom Sign-In Fields** grid, click the 🗑 icon to delete the custom sign-in field.
4. Click **OK** on the confirmation dialog.

Volunteer Application Settings

The **Volunteer Application Settings** workspace includes settings for volunteer applications.



From the **Volunteer Application Settings** workspace, you can:

- Enable/Disable Application Management
- Specify Application Acquisition Settings
- Specify Approval Queue Settings
- Specify Application Renewal Policy
- Notification Management
- Manage Online Volunteer Application Page

Enable or Disable Application Management

By default, Raptor is configured with the Volunteer Application Management feature enabled, however, the feature can be disabled to hide these settings.

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Application** from the drop-down menu.
3. From the **Application Management Enabled** drop-down list, select **Yes** (to enable) or **No** (to disable).
4. Select the **Allow Building Override** check box if the setting can be overridden at the building level. Otherwise, clear the check box.
5. Click **Save Settings**.
6. Log out of Raptor and then log in to see the change.

Specify Application Acquisition Settings

Users with the *Can Manage Volunteer Settings* permission can specify the settings for how volunteer applications are managed.

Perform the following steps to specify the volunteer application acquisition settings:

1. In the navigation menu, select **Admin > Module Settings**.

2. In the **Application Acquisition** area, specify the following settings:
   - **Allow Users to Create Volunteer Applications** - Select **Yes** (to enable) or **No** (to disable) to indicate whether users can create volunteer applications on the **All Volunteers** workspace.
   - Select the **Allow Building Override** check box if the setting can be overridden at the building level. Otherwise, clear the check box.
   - **Enable Online Volunteer Application** - Select **Yes** (to enable) or **No** (to disable) to indicate whether the online applicants can complete and submit an application from an internet browser.
   - **Application Return URL** - Enter the URL where the browser will be sent when a volunteer applicant clicks **Finish** on the last page of the online volunteer application.

     > **Note:**
     > URLs ending with a forward slash (/) are not supported.

   - **Enable Spanish Localization** - If the *Online Volunteer Application* feature is enabled, you can also enable the application form to display in Spanish. Select **Yes** (to enable) or **No** (to disable).
   - **District Email Address** - Enter the email address that will be displayed on the **Personal Information** page of the online volunteer application to be used if the applicant does not have an email address.

- **Enable Building Groups** - Select **Yes** (to enable) or **No** (to disable) to specify whether building groups display on the online volunteer application. When enabled, the user can select a building group, such as All Elementary Schools, rather than selecting each elementary school where they want to volunteer.

3. Click **Save Settings**.
4. Log out of Raptor and then log in to see the change.

Specify Approval Queue Settings

Users with the *Can Manage Volunteer Settings* permission can enable or disable the automatic approval of a volunteer application when all requirements are met, such as no matches to possible sex offender alerts, a clean criminal background screening and all custom defined requirements.

You can also enable automated notifications to the Building Volunteer Coordinator when a volunteer has been approved.

Perform the following steps to enable these features:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Application** from the drop-down menu.
3. Specify the following information:
   - **Automatically Approve When Requirements Satisfied** - Select **Yes** (to enable) or **No** (to disable) to enable or disable automatic approval of volunteer applications when requirements have been satisfied.
   - **Notify Building Volunteer Coordinator On Approval** - Select **Yes** (to enable) or **No** (to disable) to enable or disable automatic notifications to the Building Volunteer Coordinator associated with the same buildings selected on the application, when volunteer applications have been approved.

     > **Note:**
     > This feature requires the *Application Approved - Internal Notification* feature to be enabled.

   - **Allow Building Override** - Select the check box if the setting can be overridden at the building level. Otherwise, clear the check box.
4. Click **Save Settings**.
5. Log out of Raptor and then log in to see the change.

Specify Application Renewal Policy

Users with the *Can Manage Volunteer Settings* permission can select the number of days prior to the volunteer's expiration date at which time the volunteer can submit a new application. The renewal options are in 30-day increments.

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Application** from the drop-down menu.
3. From the **Allow Application Renewal Prior to Expiration** drop-down list, select the number of days prior to expiration that the volunteer can resubmit a volunteer application (30 Days is the default). To disable this feature, select **Never** from the drop-down list.
4. Select the **Allow Building Override** check box if the setting can be overridden at the building level. Otherwise, clear the check box.
5. Click **Save Settings**.
6. Log out of Raptor and then log in to see the change.

Notification Management - Volunteer Applications

Use the **Notification Management** grid on the **Volunteer Application Settings** workspace to enable and disable the notifications that are automatically sent to volunteer applicants and to people who are specified in contacts during the application process.

Notification Management

Details	Name	Recipient	Building Scope	Enabled
▶	Application Received	Applicant	All Buildings	Yes
▶	Application Approved	Applicant	All Buildings	Yes
▶	Application Denied	Applicant	All Buildings	No
▶	Application Renewal Notice	Volunteer	All Buildings	No
▶	Application Approved - Internal Notification	Client Contacts	All Buildings	Yes
▶	Volunteer Application Disclaimer	Client Contacts	All Buildings	Yes
▶	Application Requires Attention	Client Contacts	All Buildings	Yes
▶	Application Denied - Internal Notification	Client Contacts	All Buildings	Yes
▶	Volunteer Portal User Account Creation Failed	Client Contacts	All Buildings	Yes
▶	Criminal Background Screening Maintenance	Client Contacts	All Buildings	Yes
▶	Criminal Background Screening Funds Low, Depleted, or Replenished	Client Contacts	All Buildings	No

Note:
Contacts must be defined prior to using this feature where the applicant is the recipient of the notification.

The following notifications are available:

- **Application Received** – This notification will be sent to volunteer applicants upon receipt of their application. Only the applicant will receive this notification.
- **Application Approved** – This notification will be sent to volunteer applicants upon approval of their application. Only the applicant will receive this notification.
- **Application Denied** – This notification will be sent to volunteer applicants when an application has been denied.
- **Application Renewal Notice** – This notification will be sent to active volunteers when their application renewal window begins as defined by the volunteer application renewal policy.
- **Application Approved - Internal Notification** – This notification will be sent to volunteer coordinator contacts when an application has been approved. One or more contacts can be specified to receive this notification.
- **Volunteer Application Disclaimer** – This notification will be sent to the volunteer coordinator contacts when the applicant has read and accepted the disclaimer on the volunteer application.
- **Application Requires Attention** – This notification will be sent to volunteer coordinator contacts when an application needs attention. One or more contacts can be specified to receive this notification.
- **Application Denied - Internal Notification** – This notification will be sent to volunteer coordinator contacts when an application has been denied. One or more contacts can be specified to receive this notification.
- **Criminal Background Screening Maintenance** – This notification will be sent to volunteer coordinator contacts notifying them that the volunteer application service is entering maintenance mode. This applies only to customers who have the criminal background screening feature enabled.
- **Criminal Background Screening Funds Low Depleted or Replenished** – This notification will be sent to the specified client contact when the criminal background screening low funds threshold has been met, the fund is depleted, or when the fund has been replenished.
- **Volunteer Portal User Account Creation Failed** – This notification will be sent to volunteer coordinator contacts when a volunteer portal user account fails to be created because the email address is already being used by another user account. One or more contacts can be specified to receive this notification.

Perform the following steps to set up automatic notifications:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Application** from the drop-down menu.
3. In the **Notification Management** grid, click the ▶ icon in the **Details** column.
4. Depending on the notification, specify the information in the following fields:
   - **Enabled** - Select **Yes** (enable) or **No** (disable) to indicate whether the notification should be enabled.
   - **Description** - Optionally, enter a description for the notification.
   - **Email Text** - Enter the message that will be sent via email. You can also use message tokens to compile the message. See "Message Tokens for Volunteer Application Notifications" on the next page.
   - **Email Contacts** - Click **Add Contact** and select the contact name from the drop-down list. The contact information must be added prior to creating the email notification.

   > **Note:**
   > - In the **Add Contact** drop-down list, the icons that display represent the contact's preferred method of notification.
   > - If the contact has selected both Text and Email as their preferred notification method, when one method is populated with the contact name, the other method will be automatically populated.

   To remove an email contact, click the **X** in the contact label.

   > **Note:**
   > If the contact name is gray, it was defined at the district level and cannot be removed at the building level.

5. Click **Save Settings**.
6. Log out of Raptor and then log in to see the change.

Message Tokens for Volunteer Application Notifications

You can also use Message Tokens, which are variables, in the notification message so that when the message is sent, the tokens will be replaced by their associated value.

%APPLICATIONID% - Unique Application ID Number
%CLIENTNAME% - District Name
%BUILDINGNAME% - Building Name
%APPLICANTFULLNAME% - Volunteer Applicant's First and Last Name
%JUSTDATE% - Date Logged - MM/DD/YYYY

Click **Message Tokens** to view the variables that can be entered in the message.

Example:

Congratulations. Your application has been approved and you are now able to volunteer at %CLIENTNAME%.

Manage Online Volunteer Application Page

Use the **Online Volunteer Application Page** area on the **Volunteer Application Settings** workspace to manage the online volunteer application page that can be accessed from your district website.

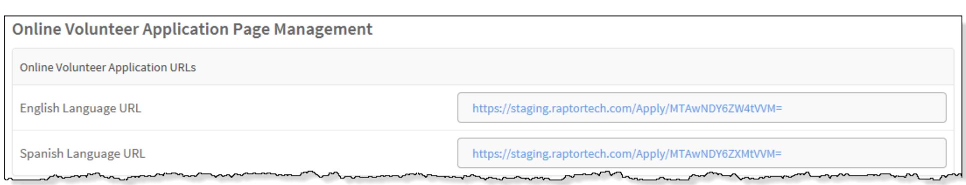
View Online Application URLs

If the *Online Volunteer Application* feature is enabled, the URLs to access the online volunteer application are generated in the **Online Volunteer Application Page Management** area in the lower portion of the **Volunteer Application Settings** workspace. You can use these URLs to display on your client website.

> **Note:**
> If the *Online Volunteer Application* feature is disabled, these fields will be disabled. You must enable the feature to enable the URL fields.

Perform the following steps to view the URLs:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Application** from the drop-down menu.



3. In the **Online Volunteer Application Page Management** area on the **Volunteer Application Settings** workspace, view the URLs in the appropriate fields:
   - **English Language URL** - If *Online Volunteer Application* is enabled, the URL to access the English language online volunteer application displays in this field.
   - **Spanish Language URL** - If *Spanish Localization* is enabled, the URL to access the Spanish language online volunteer application displays in this field.

Specify Online Volunteer Application Content

Users with the *Can Manage Volunteer Settings* permission can specify the text that displays on the following pages of the online volunteer application.

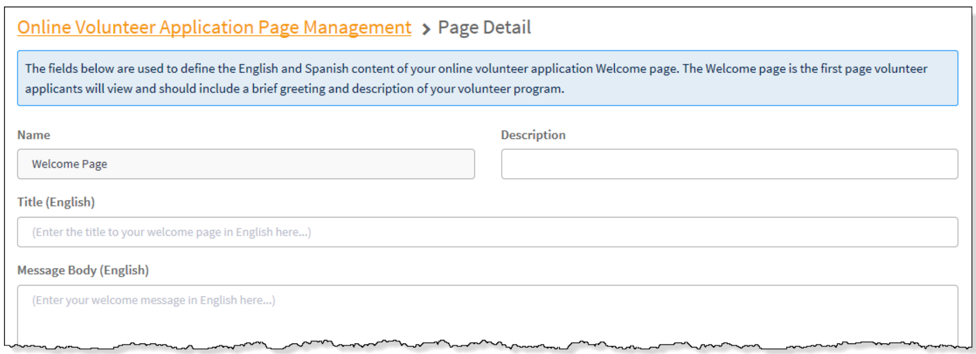
Details	Name	Building Scope
▶	Welcome Page	All Buildings
▶	Existing Volunteer Page	All Buildings
▶	Duplicate Application Page	All Buildings
▶	Applicant Banned From Applying Page	All Buildings
▶	Documents Page	All Buildings
▶	Disclaimer Page	All Buildings
▶	Self-Serve Payment Page	All Buildings
▶	Closing Page	All Buildings
▶	Application Service Unavailable Page	All Buildings

- **Welcome Page** - This is the first page that displays in the online volunteer application.
- **Existing Volunteer Page** - This page displays for a volunteer who has already been approved but who is resubmitting an online volunteer application.
- **Duplicate Applications Page** - This page displays when a person is attempting to apply using the online volunteer application however that person already has an application under review.
- **Applicant Banned From Applying Page** - This page displays if the volunteer was banned or the applicant has previously applied and their application was denied and marked as *Banned* from reapplying.
- **Documents Page** - This page displays the required documents that applicants must provide either at time of submission or before approval.
- **Disclaimer Page** - This page displays before the application **Self-Serve Payment** page or the **Closing** page and provides a disclaimer and signature field for the applicant.
- **Self-Serve Payment Page** - This page displays if you have selected one or more functions that require a background check that has an associated cost that will be paid by the applicant; allows applicant to provide payment information.

- **Closing Page** - This is the last page of the online volunteer application.
- **Application Service Unavailable Page** - This page displays when the online volunteer application is down due to maintenance.

Perform the following steps to specify the content that displays on the online volunteer application:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Application** from the drop-down menu.
3. In the **Online Volunteer Application Page Management** area on the workspace, click the ▶ icon in the **Details** column for the [page name].



4. On the **Page Detail** workspace, specify the following information:
   - **Title (English)** - Enter the title that should be displayed on the **Welcome** page of the English language online volunteer application.
   - **Message Body (English)** - Enter the welcome message that should be displayed on the **Welcome** page of the English language online volunteer application.
   - **Title (Spanish)** - Enter the title that should be displayed on the **Welcome** page of the Spanish language online volunteer application.
   - **Message Body (Spanish)** - Enter the welcome message that should be displayed on the **Welcome** page of the Spanish language online volunteer application.

   > **Note:**
   > If the Spanish language online application is disabled, you must enable it before the fields will be enabled.

5. Click **Save**.

Volunteer Portal Settings

The **Volunteer Portal Settings** workspace enables users with the *Can Manage Volunteer Settings* permission to manage the volunteer portal.

From the **Volunteer Portal Settings** workspace, you can:

- Enable/Disable Volunteer Portal
- Allow Volunteers to Add Hours
- Manage Notifications
- Access Volunteer Portal URL

Enable or Disable Volunteer Portal

Use this feature to enable or disable the volunteer portal.

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Portal** from the drop-down menu.
3. From the **Volunteer Portal Enabled** drop-down list, select **Yes** (to enable) or **No** (to disable). By default, the volunteer portal is disabled.
4. Click **Save Settings**.
5. Log out of Raptor and then log in to see the change.

Allow Volunteers to Add Hours

Use this feature to specify whether volunteers can add or edit hours they have worked in the volunteer portal.

> **Note:**
> The *Allow Volunteers to Add Hours* setting displays only when the *Enable/Disable Volunteer Portal* setting is enabled.

1. In the navigation menu, select **Admin > Module Settings** and then click the **Volunteers** tab.
2. From the **Allow Volunteers to Add Hours** drop-down list, select **Yes** (to allow) or **No** (to not allow).
3. Click **Save Settings**.
4. Log out of Raptor and then log in to see the change.

Notification Management - Volunteer Portal

Use the **Notification Management** grid on the **Volunteer Portal Settings** workspace to enable and disable the email notification that is sent to the Volunteer Coordinator when a volunteer selects the **Contact Volunteer Coordinator** option in the Volunteer Portal, and to specify the contacts who receive the email notification.

> **Note:**
> This grid only displays when the *Enable/Disable Volunteer Portal* setting is enabled.

Notification Management

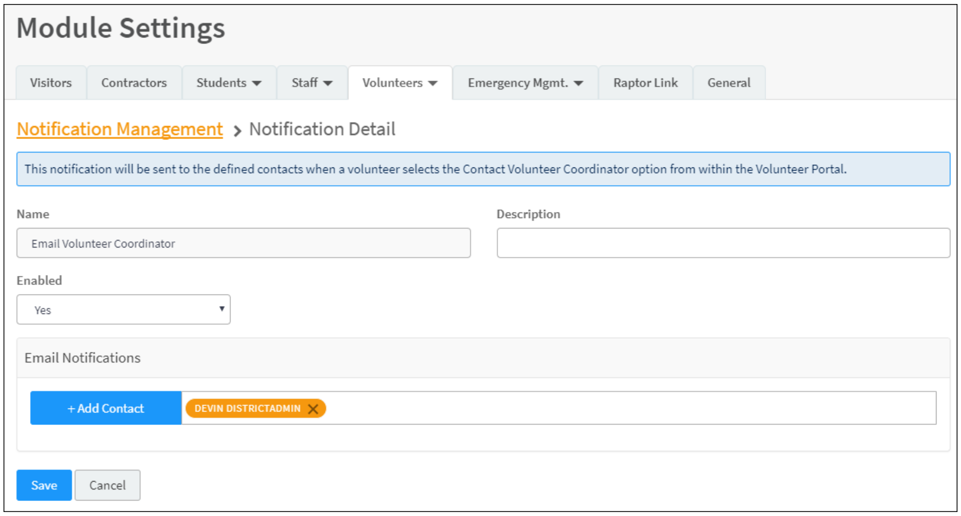
Details	Name	Recipient	Building Scope	Is Enabled
▶	Email Volunteer Coordinator	Client Contacts	All Buildings	No

> **Note:**
> Contacts must be defined prior to using this feature.

Perform the following steps to set up automatic notifications:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Portal** from the drop-down menu.

3. In the **Notification Management** grid, click the ▶ icon in the **Details** column.



4. On the **Notification Detail** workspace, specify the following information:
   - **Enabled** - Select **Yes** (enable) or **No** (disable) to indicate whether the notification should be enabled.
   - **Email Notifications** - Click **Add Contact** and select the contact name from the drop-down list. The contact information must be added in Add Users and Contacts prior to creating the email notification.

   > **Note:**
   > If the contact name is gray, it was defined at the district level and cannot be removed at the building level.

   To remove an email contact, click the **X** in the contact label.
5. Click **Save Settings**.

Access Volunteer Portal URL

This feature generates a client-specific URL to access the Volunteer Portal. This URL will also be provided in the *Volunteer Approval* notification to applicants when the Volunteer Portal is enabled, and the applicant has provided a valid email address.

> **Note:**
> If the Volunteer Portal is disabled, this field will be blank.

Perform the following steps to access the Volunteer Portal URL:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Portal** from the drop-down menu.
3. In the **Volunteer Portal Access** list on the workspace, view the URL in the **Volunteer Portal URL** field.

4. Copy the URL into your browser to access the volunteer portal for your district. You can also include this URL on your district website for volunteers to access the volunteer portal.

Event Management Settings

The **Volunteer Event Settings** workspace enables users with the *Can Manage Volunteer Settings* permission to manage the volunteer event settings in Raptor.

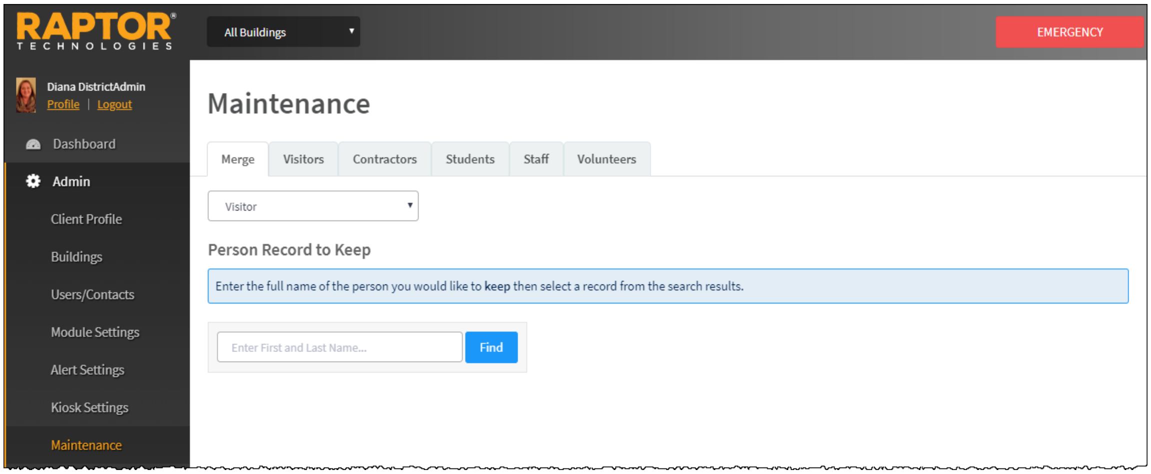
Enable/Disable Volunteer Event Management

Perform the following steps to enable or disable volunteer event management:

1. In the navigation menu, select **Admin > Module Settings**.
2. Click the **Volunteers** tab and select **Volunteer Portal** from the drop-down menu.
3. From the **Volunteer Event Management Enabled** drop-down list, select **Yes** (to enable) or **No** (to disable).
4. Select the **Allow Building Override** check box if the setting can be overridden at the building level. Otherwise, clear the check box.
5. Click **Save Settings**.
6. Log out of Raptor and then log in to see the change.

Maintenance (Admin)

The **Maintenance** workspace enables users to purge volunteer records.

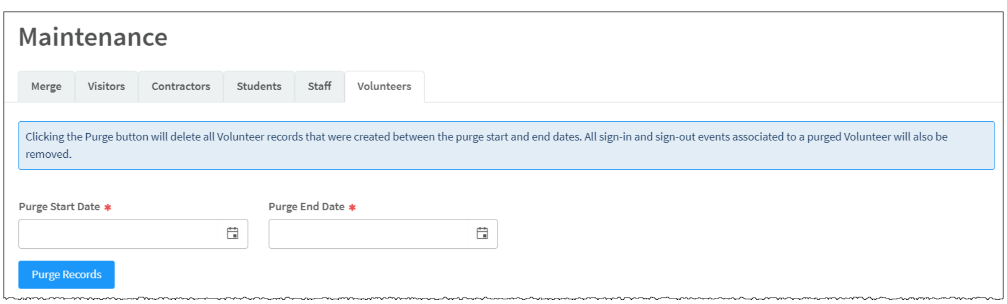


Purge Volunteer Records

Users with the *Can Perform Maintenance* permission can purge all volunteers that were created between a specified purge start date and purge end date. In addition, all sign-in and sign-out events associated with a purged volunteer will be removed.

Perform the following steps to purge volunteer records:

1. In the navigation pane, select **Admin > Maintenance**.
2. On the **Maintenance** workspace, click the **Volunteers** tab.



3. Enter the following information:
   - **Purge Start Date*** - Select the start date for the date range when staff were created.
   - **Purge End Date*** - Select the end date for the date range when staff were created.

4. Click **Purge Records**.

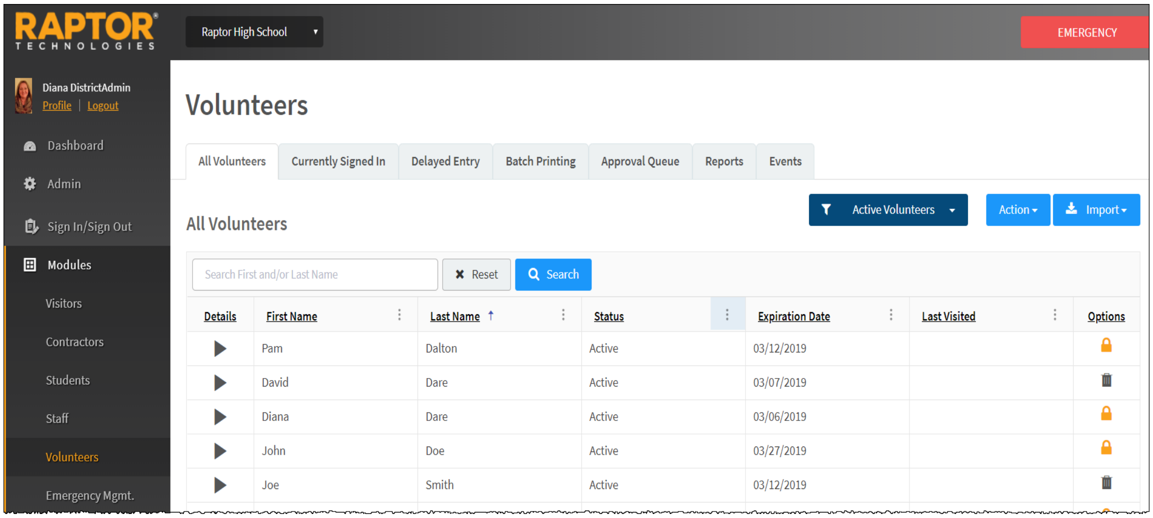
   A confirmation message is displayed for you to confirm the purge.

5. Click **Yes** to continue with the purge.

   A message is displayed in the lower right corner indicating the number of volunteer records successfully purged.

Managing Volunteers

You can manage volunteers using the **Volunteers** workspace. Select **Modules > Volunteers** in the navigation menu and then click the tab in the **Volunteers** workspace for the tasks you want to perform.

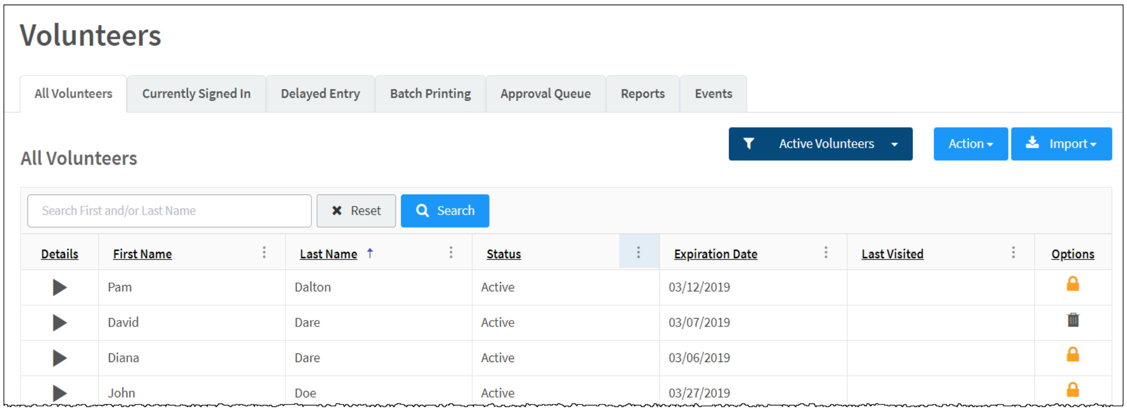


- All Volunteers - View or filter the list of all volunteers, manage volunteers and volunteer details, create or import volunteer applications, and import approved volunteers.
- Currently Signed In - View the volunteers who are currently signed into the building, print or reprint a badge, and sign out volunteers.
- Delayed Entry - If you are unable to sign in or sign out due to equipment issues or internet connection issues, you can use the *Delayed Entry* feature to manually enter the sign-in and sign-out date and time.
- Batch Printing - Run a batch of volunteers through the sex offender and custom alert checks, and then print their badges in advance of a school event where many volunteers are expected to sign in for the same event at the same time.
- Approval Queue - Used by the Volunteer Coordinators to approve or deny volunteer applications, and to review the application history log to see the status of an application.
- Reports - Run reports for volunteer activity.
- Events - Used by the Volunteer Coordinators to manage events, such as creating and viewing events, signing up volunteers for events, sending emails about events to volunteers, and deleting events.

All Volunteers

Administrators with the *Can Manage Volunteers* permission can use the **All Volunteers** tab to view a list of all volunteers.

To search for a person in the grid, enter at least two characters of the name in the search field and click **Search**. Click **Reset**.



From the **All Volunteers** tab, you can also:

- Filter volunteers to view Active Volunteers, Banned Volunteers, Expired Volunteers, Inactive Volunteers or All Volunteers
- View or modify volunteer details
- Ban a volunteer
- Delete volunteers
- Create an application for a volunteer
- Email all volunteers
- Show/Hide Functions
- Expire all volunteers
- Reset volunteer hours
- Import approved volunteers and import volunteer applications (Administrators with the *Can Import Volunteers* permission)

Filter Volunteers

You can filter which volunteers to display on the **All Volunteers** workspace. Perform the following steps to filter the volunteers that display:

1. From the navigation menu, select **Modules > Volunteers**.
2. In the **Filter** drop-down list on the **All Volunteers** workspace, select which volunteers you want to display in the workspace (**Active Volunteers**, **Banned Volunteers**, **Expired Volunteers**, **Inactive Volunteers** or **All Volunteers**).

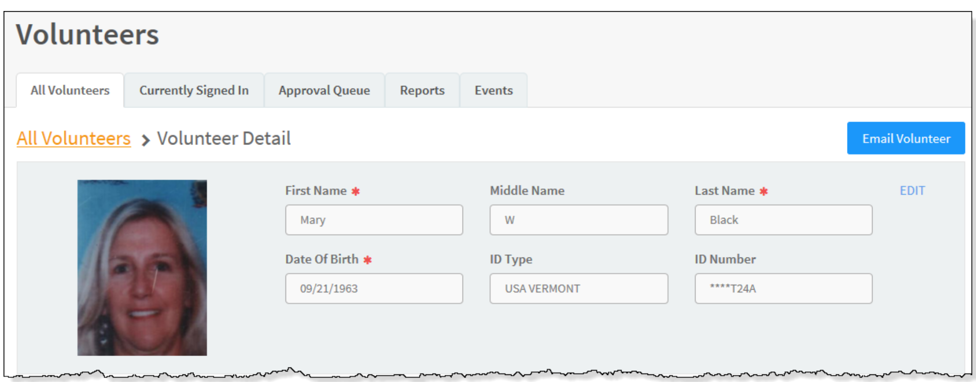
View or Modify Volunteer Details

Perform the following steps to view or modify the details about a specific volunteer.

1. From the navigation menu, select **Modules > Volunteers**.
2. On the **All Volunteers** workspace, find the volunteer whose details you want to view or modify. To search for a person in the grid, enter at least two characters of the name in the search field and click **Search**. Click **Reset** to clear the field.

> **Note:**
> The icon in the **Options** column indicates the record can only be modified at the client level (All Buildings).

3. Click the ▶ icon next to the volunteer's name to expand the **Volunteer Detail** workspace and view the volunteer details.



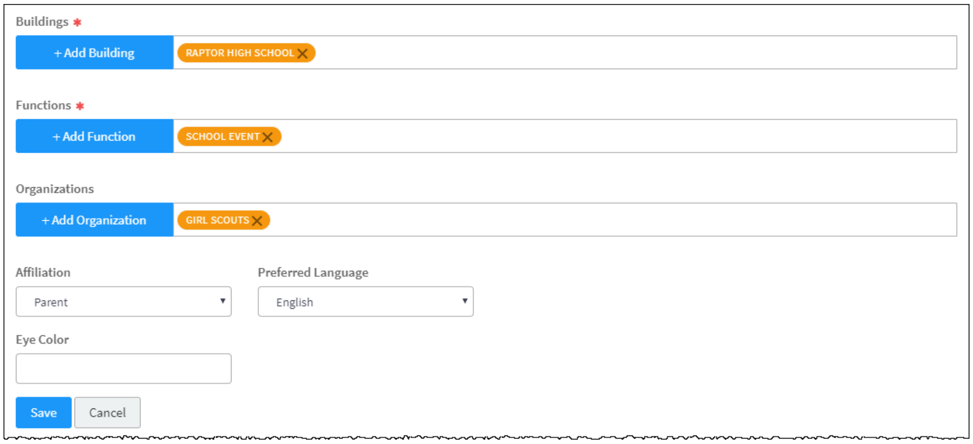
4. If you want to modify the volunteer record, click **Edit** and modify any of the following information in the volunteer record (asterisk * indicates a required field):
   - **First Name***
   - **Middle Name**
   - **Last Name***

- **Date of Birth*** - Click the icon and select the date and year.
- **ID Type** - Type of government-issued ID (Driver License or Passport) that was used for identification.
- **ID Number** - The identification number associated with the government-issued ID Type.
- **Official Record** - Select this check box if the volunteer record should become a permanent record in the Raptor system.
- **Assigned ID** - Used to store a non-government ID number that can be used for signing in via a 1D barcode reader (this feature is not yet available in the product). The **Assigned ID** must be a minimum of 4 characters.
- **Status** - Select **Active**, **Banned** or **Deactivated** from the drop-down list to change the status of the volunteer.

> **Note:**
> If you select **Banned**, you must enter a reason for banning the volunteer on the **Please Provide a Reason for Banning** dialog that is displayed when the changes are saved. See Ban Volunteer.

- **Expiration Date** - Click the icon and select the date and year.
- **Gender** - Select **Female**, **Male** or **Unspecified** from the drop-down list.
- **Race** - Select the volunteer's race or Unspecified from the drop-down list.
- **Maiden Name**
- **Address 1** - Enter the volunteer's primary physical address.
- **Address 2/Address 3**
- **City/State/Zip Code/Country**
- **Email** - Enter the volunteer's email address.
- **Primary Phone**- Enter the primary phone number for the volunteer.
- **Second Phone/Third Phone**

5. In the **Buildings*** field, click **Add Building** and select the building to which the volunteer is associated.



6. In the **Functions*** field, click **Add Function** and select the function the person is volunteering for.
7. In the **Organizations** field, click **Add Organization** and select the organization the volunteer is associate with.
8. In the **Affiliation** field, select how the volunteer applicant is associated to a student in Raptor (for example, mother or father).
9. In the **Preferred Language** field, select the language the volunteer prefers to speak.
10. Click **Save** to update the record.

Ban Volunteer

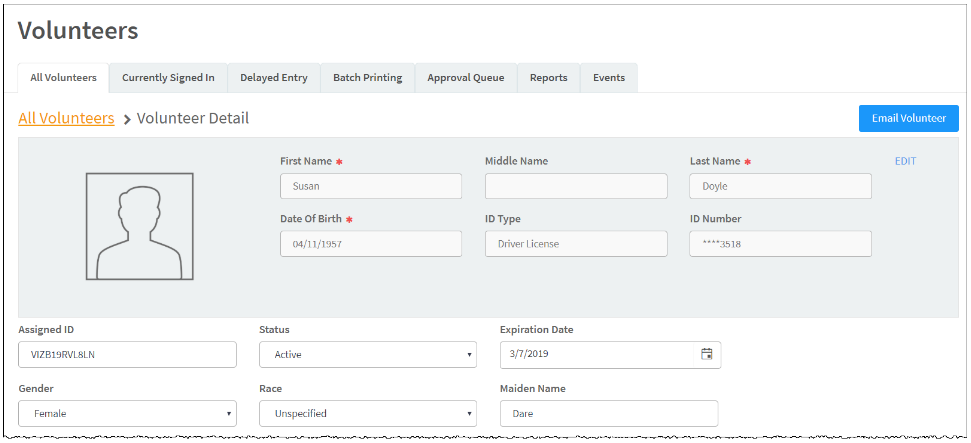
In situations where a person's volunteer privileges should be revoked, the volunteer's status can be changed to *Banned*. Volunteers who are banned, will not be able to reapply, and will lose access to the Volunteer Portal. Volunteer related notifications will also stop.

Perform the following steps to ban a volunteer:

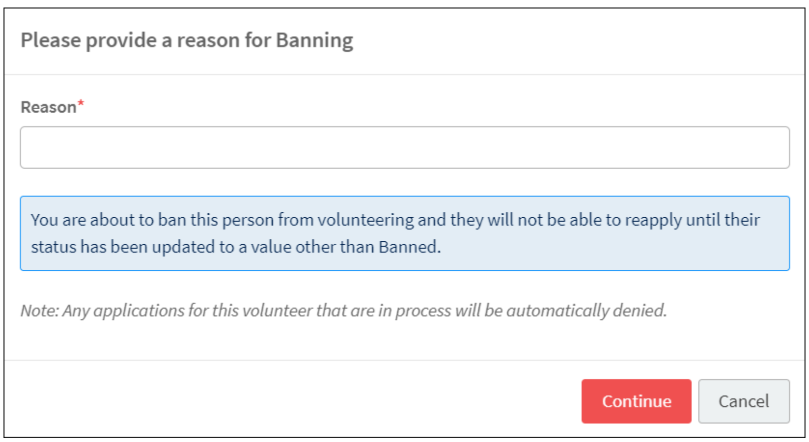
1. From the navigation menu, select **Modules > Volunteers**.
2. On the **All Volunteers** workspace, find the volunteer you want to ban. To search for a person in the grid, enter at least two characters of the name in the search field and click **Search**. Click **Reset** to clear the field.

> **Note:**
> The icon in the **Options** column indicates the record can only be modified at the client level (All Buildings).

3. Click the ▶ icon next to the volunteer's name to expand the **Volunteer Detail** workspace and view the volunteer details.



4. In the **Status** field, select **Banned** from the drop-down list.
5. Click **Save** to update the record.
6. Enter a **Reason** for banning the volunteer and click **Continue**.



The volunteer record is updated to reflect the new status.

The ban can be removed by changing the volunteer status to something other than *Banned* and saving the record.

Delete Volunteer

Perform the following steps to delete a volunteer:

1. From the navigation menu, select **Modules > Volunteers**.
2. On the **All Volunteers** workspace, find the volunteer you want to delete. To search for a person in the grid, enter at least two characters of the name in the search field and click **Search**. Click **Reset** to clear the field.

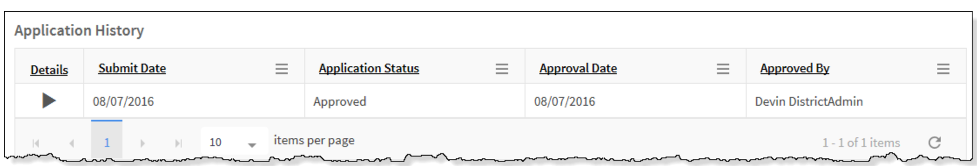
3. Click the icon in the **Options** column for the volunteer to be deleted.
4. On the confirmation dialog, click **OK** to confirm the deletion.

View Application History

At the client level (All Buildings), the **Application History** grid on the **Volunteer Detail** workspace displays a log of all applications submitted by the volunteer. By default, the submission date, application status, approval date, and who approved the application displays.

Perform the following steps to view the application history:

1. From the navigation menu, select **Modules > Volunteers**.
2. On the **All Volunteers** workspace, find the volunteer whose application history you want to view. To search for a person in the grid, enter at least two characters of the name in the search field and click **Search**. Click **Reset** to clear the field.
3. Click the ▶ icon next to the volunteer's name to expand the **Volunteer Detail** workspace.
4. Navigate to the **Application History** grid and view the date the application was submitted, status, approval date and who approved the application.



5. Click the ▶ icon to open the **Application Detail** workspace and view details for a specific application, such as applicant information, history log and required documents.

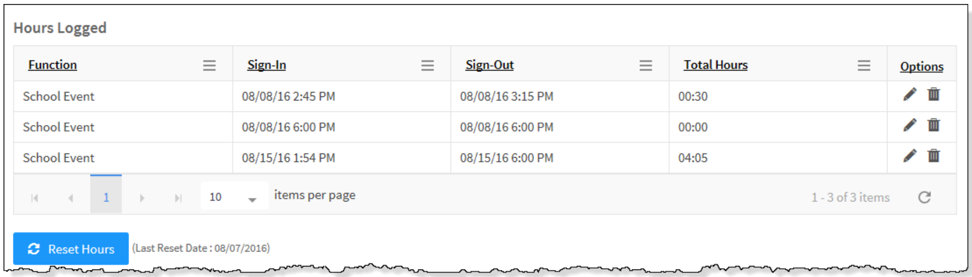
View or Modify Hours Logged

The **Hours Logged** grid on the **Volunteer Detail** workspace displays each function the volunteer has signed in for, the sign-in date and time, the sign-out date and time, and the total hours volunteered. It also includes the sign-in events and hours logged by the volunteer in the Volunteer Portal.

Perform the following steps to view the hours logged by a volunteer:

1. From the navigation menu, select **Modules > Volunteers**.
2. On the **All Volunteers** workspace, find the volunteer whose hours you want to view or modify. To search for a person in the grid, enter at least two characters of the name in the search field and click **Search**. Click **Reset** to clear the field.

3. Click the icon next to the volunteer's name to expand the **Volunteer Detail** workspace.
4. Navigate to the **Hours Logged** grid and view the hours logged by the volunteer.



Edit or Delete Hours Logged

Administrators with the *Can Manage Volunteers* permission can edit the information in the function, sign-in or sign-out date/time or delete an entry. Any of these actions will not alter the Sign In/Sign Out History.

> **Note:**
> A sign out date/time must be present to edit an entry.

- Click the icon in the **Options** column to edit the function, sign-in or sign-out date or time, or delete an entry.
- Click the icon in the **Options** column to delete an entry and then click **OK** on the confirmation dialog.

Reset Hours

You can also reset the hours that are logged for the volunteer from the **Hours Logged** grid.

Click **Reset Hours** to clear the tracked hours and reset the count to zero.

> **Note:**
> You can also reset volunteer hours at the building or district level. See Reset All Hours.

View Volunteer Sign In/Sign Out History

The **Sign-In/Out History** grid on the **Volunteer Detail** workspace displays a log of sign-in and sign-out events for the selected volunteer.

Perform the following steps to view the volunteer sign-in and sign-out history:

1. In the navigation menu, select **Modules > Volunteers**.
2. On the **All Volunteers** tab, find the volunteer whose sign-in or sign-out history you want to view. To search for a person in the grid, enter at least two characters of the name in the search field and click **Search**. Click **Reset** to clear the field.
3. Click the ▶ icon to expand the **Volunteer Detail**.
4. Navigate to the **Sign-In/Out History** grid and view the sign-in and sign-out events for the volunteer.

Sign-In/Out History

Date Time ↓	Event Type	Event Method	Building Name	Function
05/09/16 4:32 PM	Sign In	Operator Assisted	Raptor High School	School Event
04/27/16 12:12 PM	Sign Out	Operator Assisted	Raptor High School	School Event
04/27/16 11:06 AM	Sign In	Operator Assisted	Raptor High School	School Event

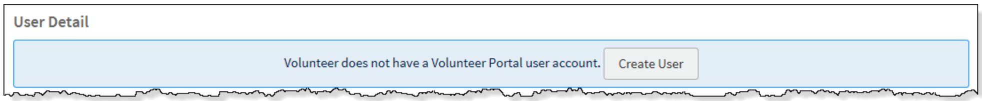
By default, the **Date/Time**, **Event Type**, **Building Name** and **Destination** columns display. From the column menu, you can also select to display the **Event Method** (hidden by default) and **Notes** columns.

Create Volunteer Portal User Account

If the Volunteer Portal is enabled and the volunteer does not have a volunteer portal user account set up, the **User Detail** area on the **Volunteer Detail** workspace displays a message bar indicating there is no Volunteer Portal user account. and provides a button to **Create User**.

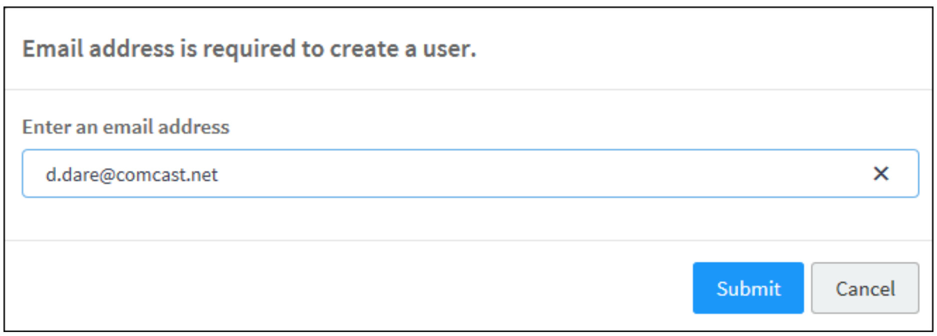
Perform the following steps to create a volunteer portal user account:

1. From the navigation menu, select **Modules > Volunteers**.
2. On the **All Volunteers** workspace, find the volunteer for whom you want to create a volunteer portal account. To search for a person in the grid, enter at least two characters of the name in the search field and click **Search**. Click **Reset** to clear the field.
3. Click the ▶ icon next to the volunteer's name to expand the **Volunteer Detail** workspace.
4. Scroll to the **User Detail** area and click **Create User**.



5. If the **Volunteer Detail** already includes an email address, the user account is created, and the *Volunteer user created message* is displayed.

   If the volunteer does not have an email address saved in the **Volunteer Detail**, the following dialog displays.



6. Enter an email address for the volunteer and click **Submit**.

   The Volunteer user created message displays and an email with instructions on how to access the Volunteer Portal are sent to the email address.

> **Note:**
> If the volunteer's email is already associated with another user account, an error will display. You must use an email address that is not in use by the Raptor System.

Show/Hide Functions

Volunteer Coordinators can filter the **All Volunteers** data grid to show those volunteers who are approved for a function. This filtered list can then be used to email those volunteers for events that require those functions.

Perform the following steps to display the functions:

1. From the navigation menu, select **Modules > Volunteers**.
2. On the **All Volunteers** workspace, click **Action** and select **Show/Hide Functions** to display the **Functions** column along with each function that the volunteers have been approved to participate.
3. Click the column **Filter** option to show only those volunteers who have the specific function associated with their profile.

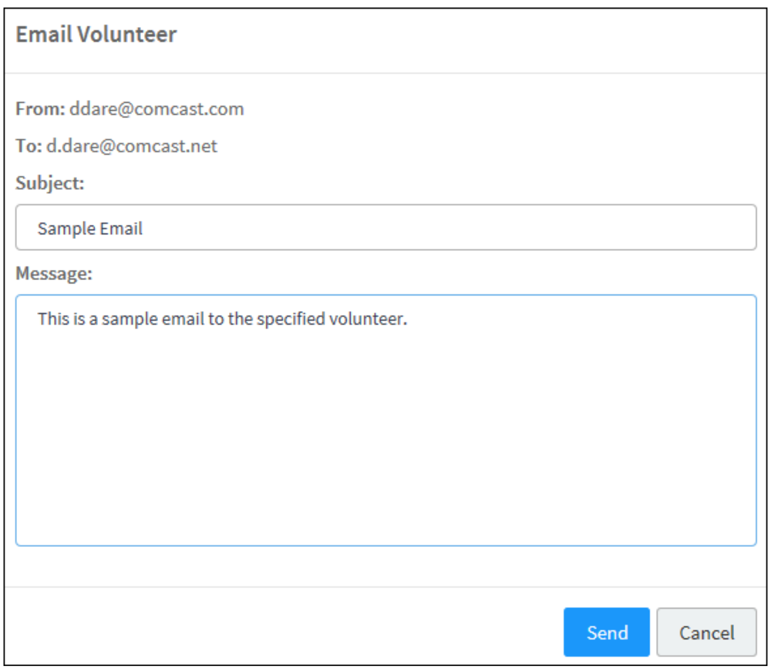
The volunteers that meet this filtered function criteria display in the All Volunteers grid. You can now email these volunteers for a specific event that requires this function.

Email Volunteer

Volunteer Coordinators can send an email to a specific volunteer from the **Volunteer Detail** workspace.

Perform the following steps to send an email to a specific volunteer:

1. From the navigation menu, select **Modules > Volunteers**.
2. On the **All Volunteers** workspace, find the volunteer you want to email. To search for a person in the grid, enter at least two characters of the name in the search field and click **Search**. Click **Reset** to clear the field.
3. Click the ▶ icon next to the volunteer's name to expand the **Volunteer Detail**.
4. Click **Email Volunteer**.



> **Note:**
> The **To** field (email recipient) will not be populated if the **Email** field in the **Volunteer Profile** does not contain a value.

5. Enter the email **Subject** and **Message**, and then click **Send**.

Expire All Volunteers

Users can expire all volunteers from the **All Volunteers** workspace. It will move all volunteers with an **Active** status to **Expired** status, and set their expiration date to the current date. You can perform this action at the client level (All Buildings) or for a specific building.

Perform the following steps to expire all active volunteers.

1. From the navigation menu, select **Modules > Volunteers**.
2. Select the building or All Buildings from the Building Selector.
3. On the **All Volunteers** workspace, click **Action > Expire All**.
4. On the **Expire Volunteers Confirmation** dialog, click **Submit**.

   A confirmation displays stating all volunteers have been expired.

Reset All Hours

Users can reset volunteer hours for the district, building or an individual volunteer. The *Reset All Hours* feature clears the volunteer's tracked hours and reset the count to zero.

This feature can be used to reset all volunteers based on the value in the building selector (for example district-wide or building-wide), or for an individual volunteer.

> **Note:**
> Resetting a volunteer's hours at any level will reset the hours across all buildings for that volunteer.

Reset All Hours from Volunteer Detail

> **Note:**
> Resetting volunteer hours at any of the levels does not affect the user's ability to report on volunteer hours prior to the reset date.

Perform the following steps to reset all hours for a specific volunteer from the **Volunteer Detail** workspace:

1. From the navigation menu, select **Modules > Volunteers**.
2. On the **All Volunteers** workspace, find the volunteer whose hours you want to reset. To search for a person in the grid, enter at least two characters of the name in the search field and click **Search**. Click **Reset** to clear the field.
3. Click the ▶ icon next to the volunteer's name to expand the **Volunteer Detail** workspace.
4. Click **Reset Hours** to reset the hours for the volunteer and clear the **Hours Logged** data grid (see View or Modify Hours Logged).
5. On the confirmation dialog, click **Submit** to reset the hours or **Cancel** if you want to cancel the action.

Reset All Volunteer Hours

> **IMPORTANT!**
> This action will reset the hours for all volunteers at **All** buildings.

Perform the following steps to reset all volunteers hours from the **All Volunteers** workspace:

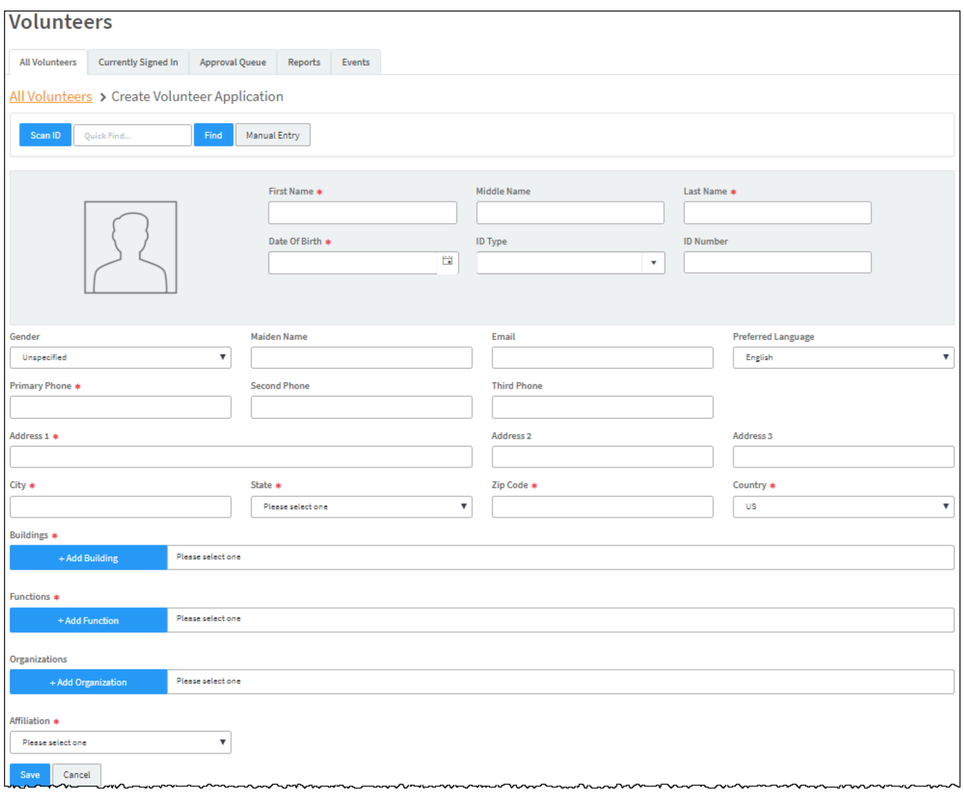
1. From the navigation menu, select **Modules > Volunteers**.
2. On the **All Volunteers** workspace, click **Action > Reset All Hours**.
3. On the **Reset All Hours Confirmation** dialog, click **Submit**.

Create Volunteer Application

A volunteer application must be completed and approved before the applicant can participate as a volunteer. The operator assisted application is available from the All Volunteers tab.

To complete a volunteer application, perform the following steps:

1. From the navigation menu, select **Modules > Volunteers**.
2. On the **All Volunteers** tab, click **Action > Create Volunteer Application**.



3. Use one of the following methods to add the volunteer’s information:
   - Insert their ID into the scanner and click **Scan ID**.
   - Enter their **First** or **Last Name** in the **Quick Find** text box and click **Find** (if they have previously been scanned or have an official record in the system). Select the name from the Search Results.
   - Click **Manual Entry** and then specify the information in the fields (* indicates required field):
     - **First Name***
     - **Last Name***
     - **Date of Birth***
     - **ID Type**
     - **ID Number**
     - **Gender**
     - **Maiden Name**
     - **Email**
     - **Preferred Language**
     - **Primary Phone***
     - **Second Phone/Third Phone**
     - **Address 1*/Address 2/Address 3**
     - **City*/State*/Zip Code*/Country***
4. In the lower portion of the screen, specify the following information.
   - **Buildings*** - Click **Add Building** and select the building to which the volunteer is associated.
   - **Functions*** - Click **Add Function** and select the function the person is volunteering for.

     > **Note:**
     > Only the functions created at the All Building level and for the specific buildings selected will be available.

   - **Organizations** - Click **Add Organization** and select the organization the volunteer is associated with.
   - **Affiliations*** - From the drop-down list, select how the volunteer applicant is associated to a student in Raptor (for example, mother or father).
5. Click **Save**.

   A message is displayed indicating the application was successfully saved.

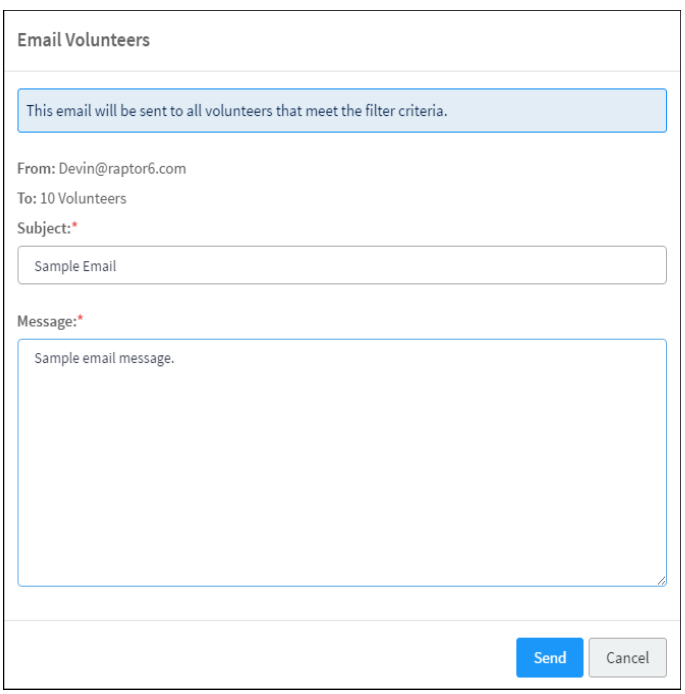
> **Note:**
> If the volunteer was banned or the volunteer applicant has previously applied and their application was denied and marked as *Banned* from reapplying, an import error message will display indicating the person is banned from reapplying.

Email All Volunteers

Volunteer Coordinators can send an email to all volunteers or a filtered set of volunteers from the **All Volunteers** workspace. Perform the following steps to email all volunteers:

1. From the navigation menu, select **Modules > Volunteers**.
2. On the **All Volunteers** workspace, use the column filters to display the volunteers you want to email. For example, if you need to send an email to volunteers who can tutor, un-hide the **Functions** column and filter the **Functions** column for **Tutor**.
3. Click **Action > Email All**.

   A dialog box displays confirming the volunteers based on the selected filters.
4. Click **Proceed** on the confirmation dialog or click **Filter List Further** to return to the **All Volunteers** grid to change your filtered list.



5. Enter the email **Subject** and **Message**, and then click **Send**.

Import Approved Volunteers

For Administrators with the *Can Import Volunteers* permission, the Import Volunteers utility enables you to import a list of pre-approved volunteers into the Raptor system. It also includes the ability for unattended import of volunteers by creating a manifest file that includes information about the field mapping and file to be imported.

In addition, volunteer portal accounts are created automatically during the import process if a valid email address is available. Upon import completion, the volunteer receives an email notifying them that a Volunteer Portal user account has been created.

Note:

- When you import volunteers, the volunteers do not go through the approval process. Their records are immediately created in the system.
- A Volunteer Portal account will not be automatically created for the imported volunteers.
- To use this feature, you must first create an Excel spreadsheet or comma delimited file that contains the required information.
- The use of special characters in an Excel formatted import file may cause unexpected results.
- When import is used to update existing records, fields that are not imported will not be overwritten.
- To import multiple Functions, Buildings, and/or Organizations, enter all items into the appropriate Excel cell of your import file, separating each function, building and/or organization with a vertical bar (|). For example, if you have multiple functions, in the Function cell, enter Hall Monitor | Mentor.

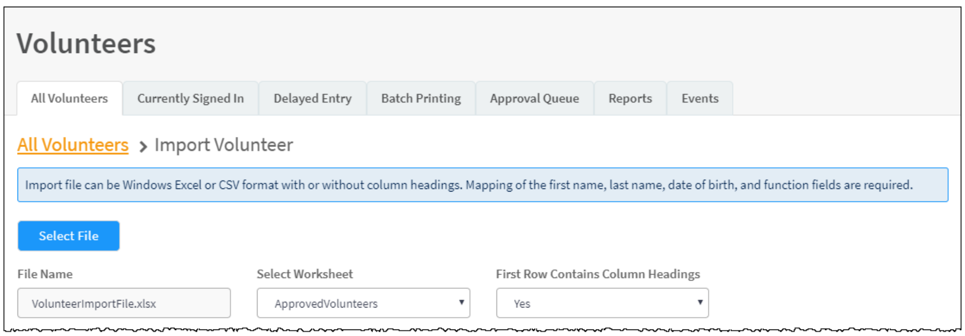
The file can contain the following Volunteer information to be imported (* indicates required information):

- First Name*
- Last Name*
- Middle Name
- Date of Birth*
- Assigned ID
- Gender
- Address/City/State/Zip Code
- Primary Phone
- Email Address* - Required only if you want a volunteer portal account created automatically.
- Functions*
- Affiliation
- Organizations

- Expiration Date
- Preferred Language
- Buildings

Perform the following steps to import a list of volunteers into Raptor:

1. From the navigation menu, select **Modules > Volunteers**.
2. On the **All Volunteers** workspace, click **Import > Approved Volunteers**.
3. Click **Select File** and navigate to the location where the file is saved on your computer.
4. Select the **Excel** or **CSV** file and click **Open**.

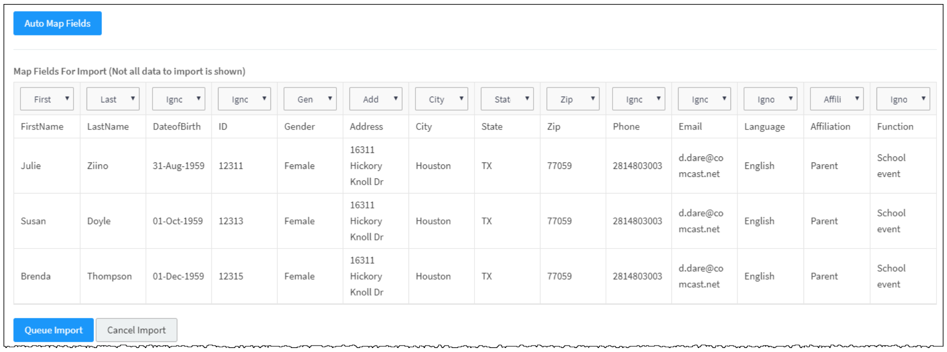


5. If you used Excel and the file contains multiple worksheets, select the worksheet that contains the volunteer information from the **Select Worksheet** drop-down list.
6. If the first row of the worksheet contains column headings, select the **Yes** from the **First Row Contains Column Headings** drop-down list and this row will not be imported. Otherwise, select **No**.
7. Click **Auto Map Fields** to automatically map the column headings in the file to the mapping names in Raptor. The names must be identical.

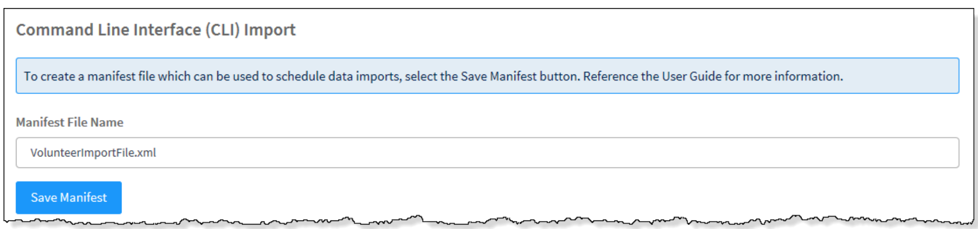
   You can also manually map each of the columns to be imported by selecting the appropriate fields in the drop-down menu above each column that displays.

   First Name, **Last Name**, **Date of Birth**, and **Function** are required columns.

The columns with **Ignore** selected with not be imported.



8. Click **Queue Import**.
9. If you want to create a manifest file to schedule automatic imports, click **Save Manifest** and save the file. You can then schedule the imports using a scheduling utility. See Using Manifest Import.



When the import has completed processing, an email will be sent to the email address of the user indicating the number of records successfully imported and any error that have occurred.

Additionally, an email will be sent to the volunteer indicating that a volunteer portal user account has been created. Included in the email are instructions for logging into the portal for first-time and returning portal users.

Import Volunteer Applications

The Import Applications utility enables you to import a list of volunteer applications into the Raptor system. The applications are sent to the Approval Queue where the Volunteer Coordinator can decide to approve or deny the application. If approved, the volunteer record is created in the system.

This import utility also provides the ability for unattended import of volunteer applications by creating a manifest file that includes information about the field mapping and file to be imported.

Note:

- You can import volunteer applications for a specific building or All Buildings.
- To use this feature, you must first create an Excel spreadsheet or comma delimited file that contains the required information.
- The use of special characters in an Excel formatted import file may cause unexpected results.
- When import is used to update existing records, fields that are not imported will not be overwritten.
- To import multiple Functions, Buildings and/or Organizations, enter all items into the appropriate Excel cell of your import file, separating each function, building and/or organization with a vertical bar (|). For example, if you have multiple functions, in the Function cell, enter Hall Monitor | Mentor.

The file can contain the following Volunteer information to be imported (* indicates required information):

- First Name*
- Last Name*
- Middle Name
- Date of Birth*
- Gender
- Address/City/State/Zip Code
- Primary Phone
- Email
- Functions*
- Affiliation
- Organizations
- Buildings

Perform the following steps to import volunteer applications into Raptor:

1. From the navigation menu, select **Modules > Volunteers**.
2. On the **All Volunteers** workspace, click **Import > Applications**.

3. Click **Select File** and navigate to the location where the file is saved on your computer.
4. Select the **Excel** or **CSV** file and click **Open**.
5. If you used Excel and the file contains multiple worksheets, select the worksheet that contains the volunteer information from the **Select Worksheet** drop-down list.
6. If the first row of the worksheet contains column headings, select **Yes** from the **First Row Contains Column Headings** drop-down list and this row will not be imported. Otherwise, select **No**.
7. Click **Auto Map Fields** to automatically map the column headings in the file to the mapping names in Raptor. The names must be identical.

   You can also manually map each of the columns to be imported by selecting the appropriate fields in the drop-down menu above each column that displays.

   First Name, **Last Name**, **Date of Birth**, and **Function** are required columns.

   The columns with **Ignore** selected will not be imported.
8. If you want to create a manifest file to schedule automatic imports, click **Save Manifest** and save the file. You can then schedule the imports using a scheduling utility. See Using Manifest Import.
9. Click **Queue Import**.

   A message displays in the lower right corner of the screen stating that the import job was successfully added to the import queue for processing.

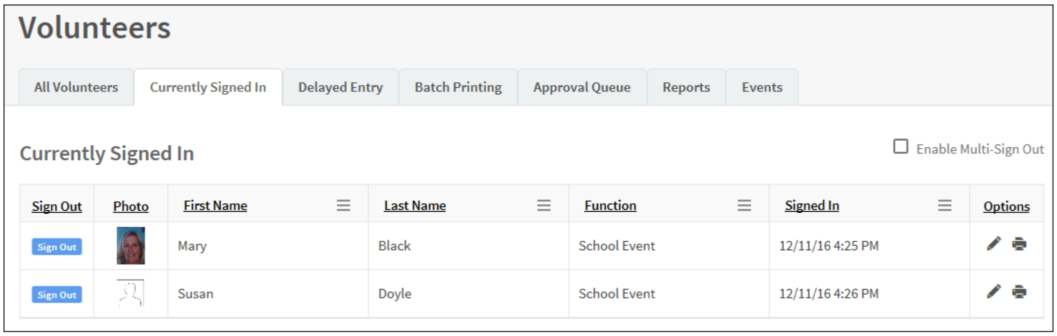
   When the import has completed processing, an email will be sent to the email address of the user indicating the number of records successfully imported and any error that may have occurred.

> **Note:**
> If the volunteer was banned or the volunteer applicant has previously applied and their application was denied and marked as *Banned* from reapplying, an import error message will display indicating the person is banned from reapplying.

The volunteer applications go to the approval queue for the volunteer coordinator to approve or deny the application. See Approval Queue. If enabled, a Volunteer Portal user account will automatically be created when the application is approved.

Currently Signed In Volunteers

Use the **Currently Signed In** tab to view all volunteers who are currently signed in, their photo, the sign in date and time, and their function. You can hover the cursor over the photo in the data grid to view an enlarged photo.



You can also perform the following tasks from this tab:

- Print or Reprint Badge
- Sign Out Volunteers

Print or Reprint Badge

If a volunteer has lost their badge or changed their destination, or the printer has malfunctioned, perform the following steps to reprint their:

1. In the navigation menu, select **Modules > Volunteers**.
2. Click the **Currently Signed In** tab.
3. In the **Options** column, click the icon to print or reprint the volunteer's badge.

Sign Out Volunteers

You can use the **Currently Signed In** tab on the **Volunteers** workspace to sign out a single volunteer or multiple volunteers. Perform the following steps to sign out volunteers from this workspace:

1. In the navigation menu, select **Modules > Volunteers**.
2. Click the **Currently Signed In** tab.
3. Use one of the following depending on whether you want to sign out a single volunteer or multiple volunteers:
   - To sign out a single volunteer, click **Sign Out** next to the volunteer's name.
   - To sign out multiple volunteers, select the **Enable Multi-Sign-Out** check box in the upper right corner, select the check box next to all the volunteers to be signed out, and then click **Sign Out**. To return to single sign-out mode, clear the **Enable Multi-Sign-Out** check box.

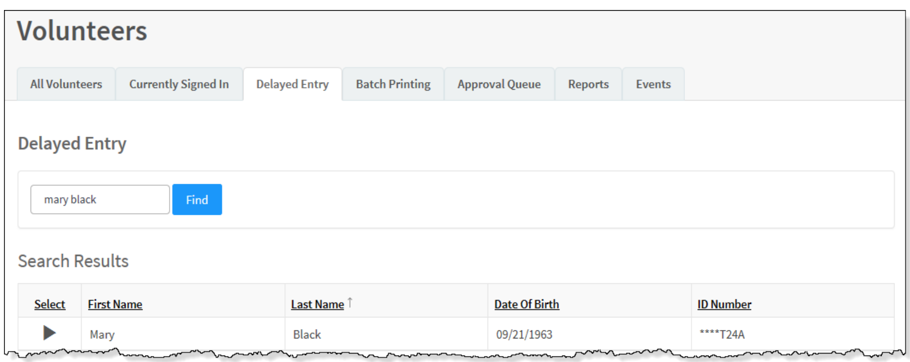
Volunteer Delayed Sign In and Sign Out

> **Note:**
> This feature is not visible at the All Buildings level.

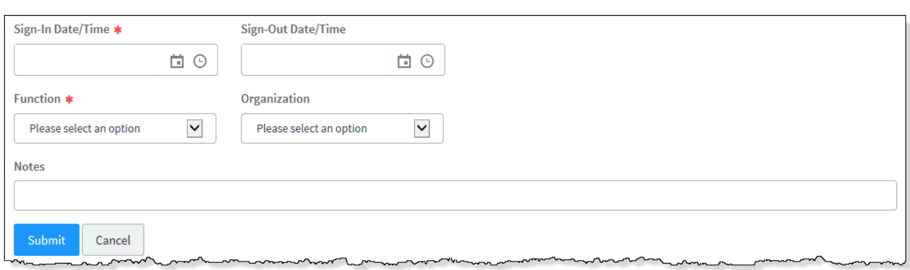
If you are unable to sign in or sign out due to equipment issues or internet connection issues, you can use the *Delayed Entry* feature to manually enter the sign-in and sign-out date and time. This feature allows users to record the actual sign-in and sign-out time but the entry is delayed until the system is available.

Perform the following steps to use the Delayed Entry feature:

1. Select the school from the Building Selector (you must select a specific building to use the delayed entry feature).
2. From the navigation menu, select **Modules > Volunteers** and click the **Delayed Entry** tab.
3. If the person has previously been scanned into Raptor, enter their **First Name** or **Last Name** in the text field, click **Find**.



4. Click the ▶ icon to select the volunteer's name in search results and expand the workspace.



5. Enter the following information (asterisk * indicates a required field):
   - **Sign-In Date/Time*** - Click the icon to select the date and then click the icon to select the time that the person signed in.
   - **Sign-Out Date/Time** - If the system was still down when the person signed out, click the icon to select the date and then click the icon to select the time that the person signed out.

     > **Note:**
     > The **Sign-In Date** and **Sign-Out Date** must be the same date.

   - **Function*** - From the drop-down list, select the reason the volunteer is signing in.
   - **Organization** - From the drop-down list, select the organization associated with the volunteer. This field is required if the *Require Sign-In Organization* setting is enabled (disabled by default).
   - **Notes** - Optionally, enter notes that describe the event.
6. Click **Submit**.

   A *Delayed Entry Successful* message displays in the lower right corner of the screen.

Batch Printing

> **Note:**
> This feature is not visible at the All Buildings level.

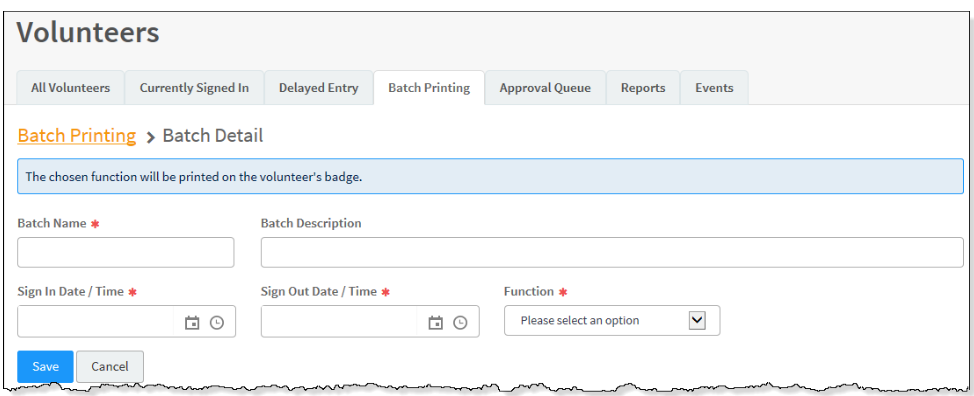
The Batch Printing feature enables users to run a batch of volunteers through the sex offender and custom alert checks, and then print their badges in advance of a school event where many volunteers are expected to sign in for the same event at the same time.

Using this feature speeds up the sign in process for an event and helps prevent a long line of volunteers at the Front Desk. When the volunteers arrive, you simply look at their ID and hand them their badge.

While running the batch, if one or more volunteers are flagged with an offender or custom alert, the user can view the alerts and decide if the person is a match. If they are a match, no badge is created, and they will not be signed in at the time designated in the Batch Detail.

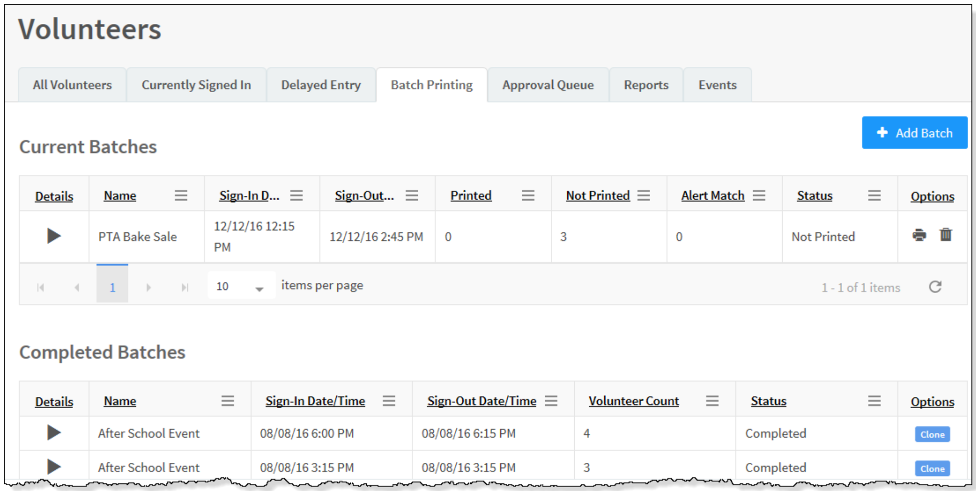
Add Batch Print Job

> **Note:**
> You can also copy a **Completed Batch** job and modify it to create a new batch job. See Clone Batch Print Job.



Perform the following steps to add and execute a batch print job:

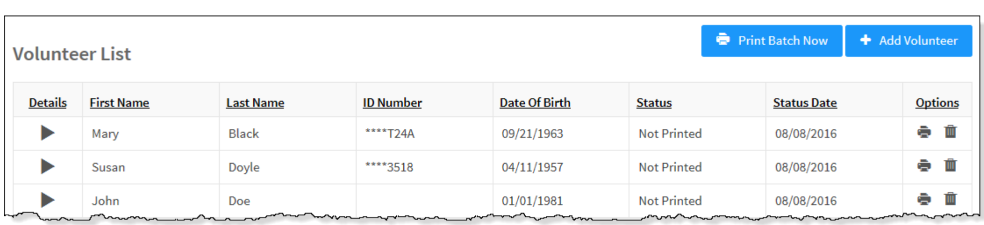
1. Select the school from the Building Selector (you must select a specific building).
2. From the navigation menu, select **Modules > Volunteers** and then click the **Batch Printing** tab.



3. Click **Add Batch**.
4. Enter the following information on the **Batch Detail** workspace (asterisk * indicates a required field):
   - **Batch Name*** - Enter a name for the batch job.
   - **Batch Description** - Enter a description for the batch job.
   - **Sign-In Date/Time*** - Click the icon to select the sign-in date and then click the icon to select the sign-in time.
   - **Sign-Out Date/Time*** - Click the icon to select the sign-out date and then click the icon to select the sign-out time.

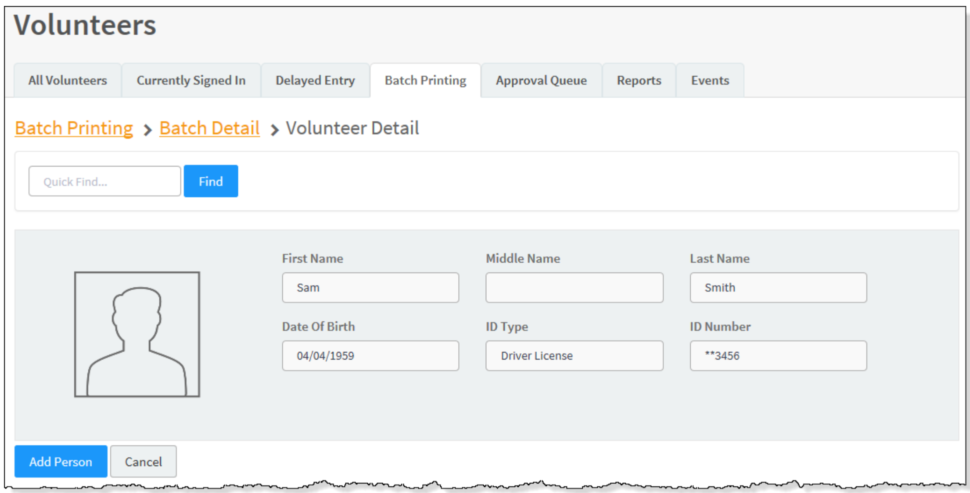
     > **Note:**
     > The **Sign-In Date** and **Sign-Out Date** must be the same date.

   - **Destination/Reason*** - Select where the person is going in the building or the reason for the visit from the drop-down list. You can also enter a custom value in the text field.
5. Click **Save**.
6. In the **Volunteer List** grid on the **Batch Detail** workspace, click **Add Volunteer**.



> **Note:**
> You can only add volunteers to the batch if they have previously signed in and have an official record in the Raptor system.

7. Enter the volunteer's name in the text box and then click **Find**.
8. In the search results, click **Select** next to the volunteer's name.
9. On the **Volunteer Detail** workspace, click **Add Person**.



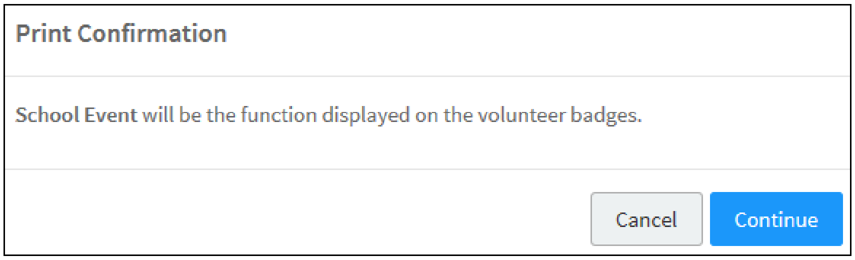
10. Repeat Step 6 through Step 9 for all volunteers to be added to the batch.

Execute Batch Printing

Perform the following steps to execute and print the batch from either the **Batch Printing** workspace or the **Batch Detail** workspace.

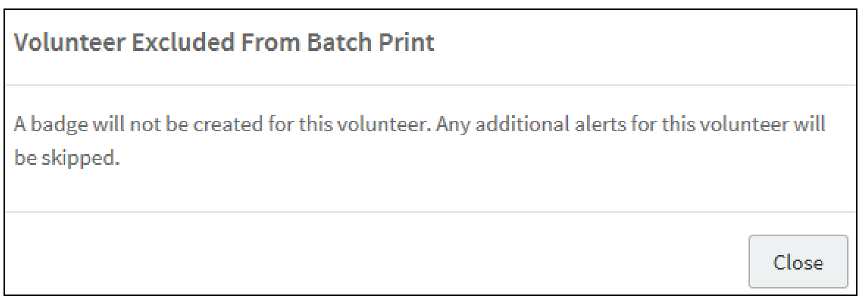
1. In the navigation menu, select **Modules > Volunteers** and then click the **Batch Printing** tab.
2. Use one of the following methods to execute and print the batch:
   - From the **Current Batches** grid on the **Batch Printing** workspace, click the icon in the **Options** column to execute the batch.
   - From the **Current Batches** grid on the **Batch Printing** workspace, click the icon to open the **Batch Print Details** workspace. In the **Volunteers List** grid, click **Print Batch Now**.

The following confirmation dialog displays.



3. Click **Continue**.
4. If a Possible Offender alert displays for any of the volunteers in the batch, review the information and determine if it is a match. See Possible Offender Alert for Volunteer Applicant.

   If the volunteer is a match to an offender or custom alert, the badge will not be printed and the following dialog displays.



5. Click **Close** to exit the dialog and continue with the batch printing.

> **Note:**
> The badges print alphabetically with any possible alert matches (confirmed as a no match) printing at the end of the batch.

When all the badges have printed, a dialog displays indicating the *Batch printing is complete* and displays how many badges were printed.

6. Click **Close** to exit the dialog.

   On the date and at the time specified in the **Batch Print Sign-In Date/Time**, the volunteers will be automatically signed in to the Raptor system.

   On the date and at the time specified in the **Batch Print Sign-Out Date/Time** field, the volunteers will be automatically signed out.

> **Note:**
> - A batch print is not complete until both the sign-in and sign-out times have elapsed. Up until the sign-out time has elapsed, the batch print is still considered active and can be modified.
> - Once the sign-out time has elapsed, the batch print is considered complete and will be moved to the Completed Batches grid.

Clone Batch Print Job

The Clone Batch feature enables you to copy a **Completed Batch** job and modify it to create a new batch job. Perform the following procedure to clone a batch print job:

1. Select the school from the Building Selector (you must select a specific building).
2. From the navigation menu, select **Modules > Volunteers** and then click the **Batch Printing** tab.
3. In the **Completed Batches** grid, click **Clone** in the **Options** column for the batch job you want to copy.

Completed Batches

Details	Name	Sign-In Date/Time	Sign-Out Date/Time	Volunteer Count	Status	Options
▶	After School Event	08/08/16 3:15 PM	08/08/16 3:15 PM	3	Completed	Clone
▶	Bake Sale	08/08/16 2:45 PM	08/08/16 5:30 PM	3	Completed	Clone

4. On the **Batch Detail** workspace, enter the following information (asterisk * indicates a required field):
   - **Batch Name*** - Optionally, modify the batch job name.
   - **Batch Description** - Optionally, modify the description for the batch job.
   - **Sign-In Date/Time*** - Click the icon to select the sign-in date and then click the icon to select the sign-in time.
   - **Sign-Out Date/Time*** - Click the icon to select the sign-out date and then

click the icon to select the sign-out time.

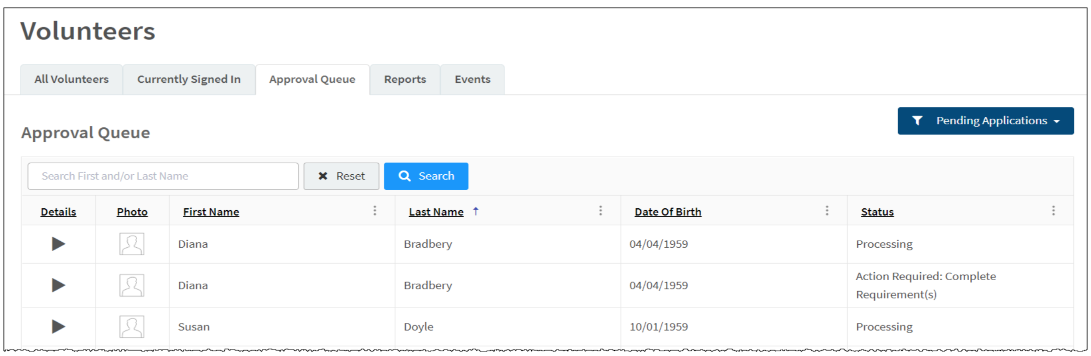
> **Note:**
> The **Sign-In Date** and **Sign-Out Date** must be the same date.

- **Function*** - From the drop-down list, select the reason the volunteer is signing in.

5. Click **Save**.

Approval Queue

The **Approval Queue** tab is used by the Volunteer Coordinator to approve or deny volunteer applications, and to review the application history log to see the status of an application. You must have the *Can Approve Volunteers* permission to see this tab.



From this workspace, you can:

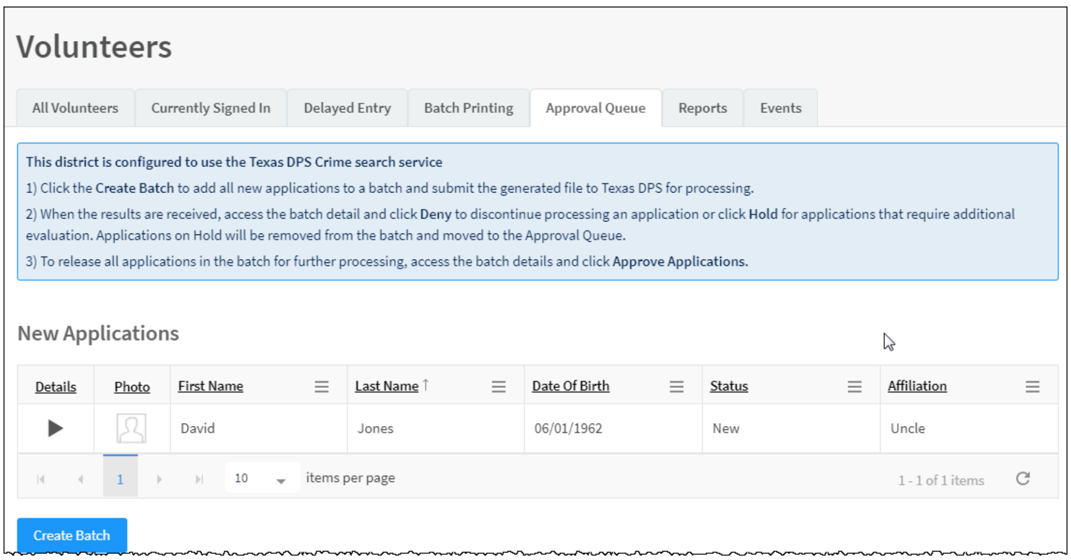
- Use Texas DPS Screening for your Volunteer Applications
- View Application Status
- View Application Details
- View Application History Log
- View Required Documents
- Process Possible Offender Alert for Volunteer Applicant
- Criminal Background Screening for Volunteer Applicant
- WATCH Criminal Background Screening for Volunteer Applicant
- Manually Approve Application

Texas DPS Screening

If your district has the Texas DPS screening feature enabled, the volunteer applications can be exported to a batch file and sent to the Texas DPS for screening. Once the applications are returned, the volunteer coordinator can take the appropriate action to process the application.

> **Note:**
> - The Texas DPS screening feature is only available to districts within the state of Texas.
> - All applications for applicants under age 18 will bypass criminal background screening (Texas DPS), if enabled, and go directly into the **Approval Queue**. A message is written to the **Application History Log** informing the volunteer coordinator that the applicant is under age 18.

The **New Applications** grid displays on the **Approval Queue** workspace.



Incoming volunteer applications go through the following workflow:

- The application status is set to *New* and the application is held in the **New Applications** grid on the **Approval Queue** workspace.
- A batch is created (click **Create Batch**) when one or more applications are displayed in the **New Applications** grid.
- A Texas DPS formatted file is generated and downloaded to the user's computer.
- The new batch is added to the **Pending Batch** grid on the **Approval Queue** workspace.
- The user submits the batch file to the external provider (Texas DPS) for processing.

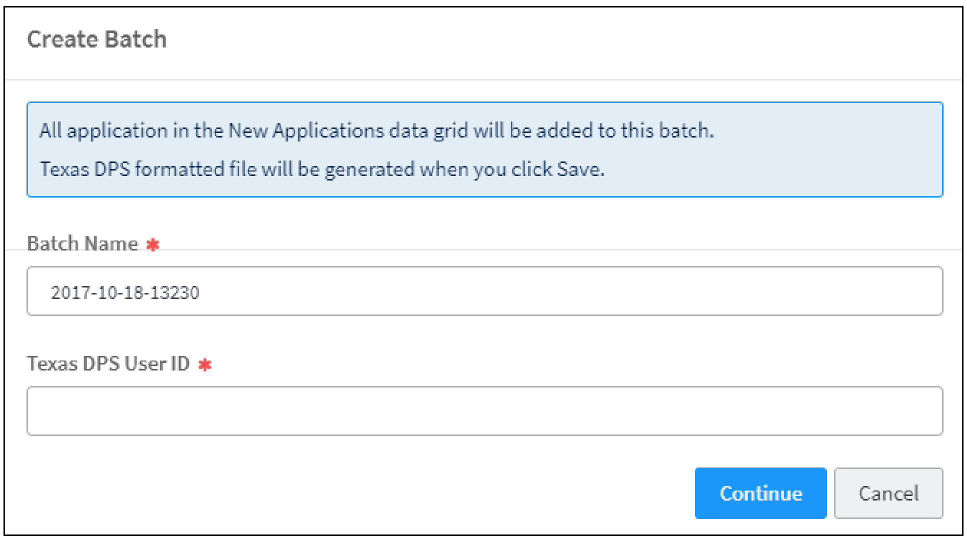
- Upon receipt of the results from the external provider, the Volunteer Coordinator takes the appropriate action in the pending batch to process the applications (**Approve**, **Deny** or **Hold**).

Create Texas DPS Batch

When the Texas DPS screening feature is enabled, all new applications display in the **New Applications** grid on the **Approval Queue** workspace. You must create a batch and submit the file to Texas DPS. When the results are received, you must complete the application approval process.

Perform the following steps to create a batch for Texas DPS:

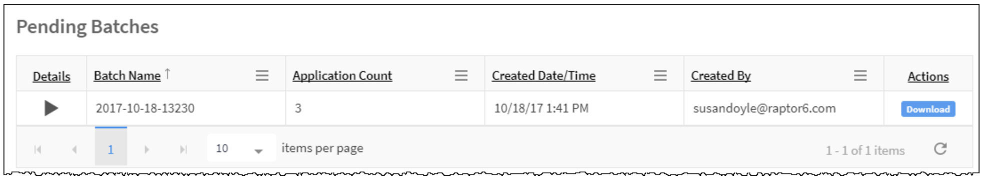
1. Click **Create Batch** to add all the new applications to a batch file.



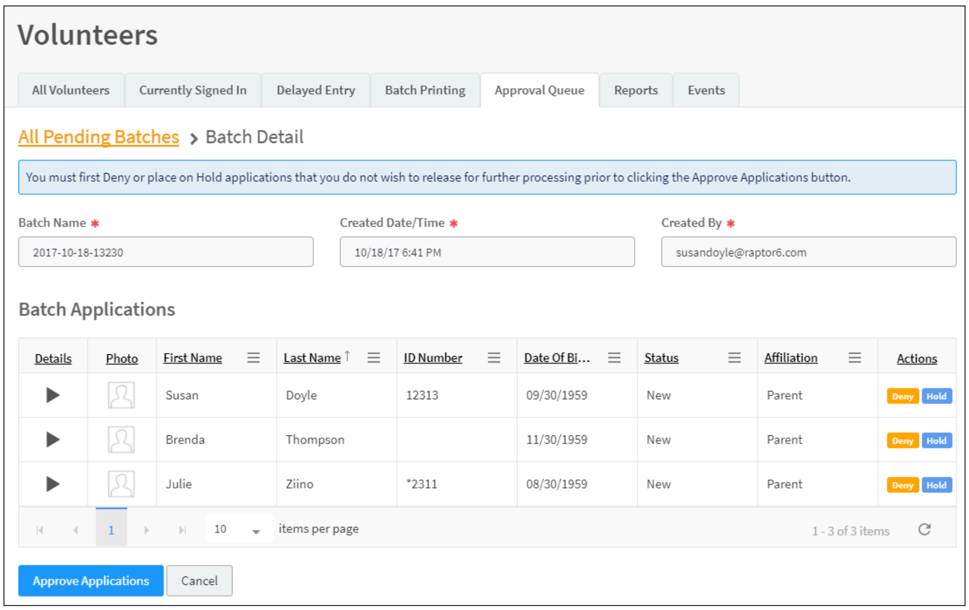
2. Enter a **Batch Name*** (if different than default name) and your **Texas DPS User ID***, and then click **Continue** to create the batch file.

   The batch file is downloaded in text format to your computer and is moved to the **Pending Batches** area on the **Approval Queue** workspace.

   You can also download the batch file from the **Pending Batches** grid. In the **Actions** column, click **Download**.
3. Submit the batch file to Texas DPS.
4. Upon receiving the results from Texas DPS, navigate to the **Pending Batches** grid to continue processing the applications.



5. Click the ▶ icon to open the **Batch Detail** workspace.



6. If you want to review the details of an application in the batch prior to processing it, click the ▶ icon.
7. On the **Batch Detail** workspace, click one of the following buttons to process the applications in the batch:

> **Note:**
> You must **Deny** or put on **Hold** any applications in the batch that are not going to be approved before clicking the **Approve Applications** button.

- **Deny** - Click this button if you want to deny the application and remove it from the batch. Enter a **Reason for denial** on the dialog and click **Continue**.

  If you want to ban the applicant from reapplying, select the **Ban from reapplying** check box.

  The application is removed from the batch and *Application Denied - <Reason>* is entered in the **History Log** for the application.

- **Hold** – Click this button if you want to place a hold on the application for further processing. Enter a **Reason for Placing on hold** on the dialog and click **Continue**.

  The application is removed from the batch and moved to the **Approval Queue** with a *Pending* status. An *Application on Hold - <Reason>* is entered in the **History Log** for the application.
- **Approve Applications** – Click this button to approve any applications that remain in the batch and are approved for processing. Click **Continue** on the confirmation dialog to release the application from the batch and continue processing.

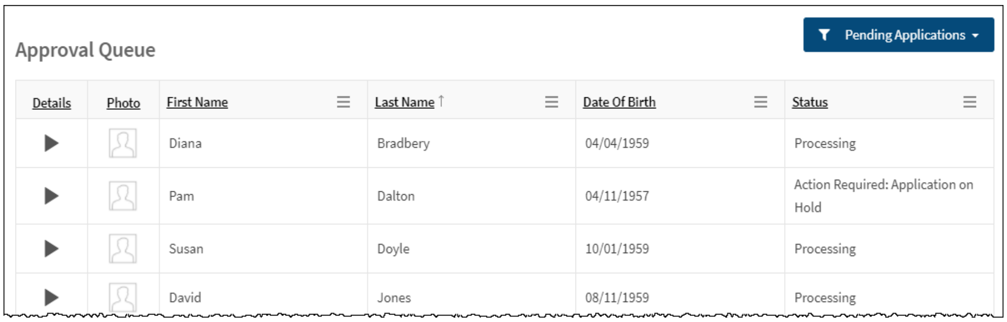
  A *Released from Texas DPS Batch <Batch Name>* is entered in the **History Log** for the application.

8. Once the batch is approved, if an application requires attention prior to final approval, the Volunteer Coordinator will be sent an email indicating the application needs their attention. Proceed to Approve Volunteer Applicants.

Approve Volunteer Applicants

Volunteer Coordinators use the **Approval Queue** to manually process applications. They can manually deny a volunteer application from the **Approval Queue** at any time. However, all required tasks must be completed before an application can be approved.

The **Approval Queue** grid includes a quick filter that provides access to pending applications, approved applications, denied applications, or all applications. The filter is set to pending applications by default.



Note:

- If your district has the *Automatically Approve When Requirements Satisfied* feature enabled, only those applications that do not have all requirements satisfied will display in the **Approval Queue** grid. You can view the reason these applications were flagged in the **Status** column or on the **Application Detail** workspace (see View Application Status).
- All applications for applicants under age 18 go into the **Approval Queue**. A message is written to the **Application History Log** informing the volunteer coordinator that the applicant is under age 18.

The approval process includes the following tasks:

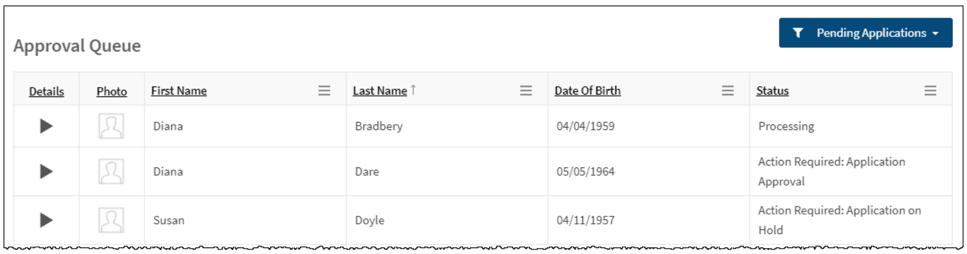
- View Application Status
- View Application Details
- View Application History Log
- View Required Documents
- Possible Offender Alert for Volunteer Applicant
- Criminal Background Screening for Volunteer Applicant
- Manually Approve Applicants

View Application Status

Users with the *Can Approve Volunteers* permission can view the status of a volunteer's application as it goes through the approval process. This allows the volunteer coordinator to view the current state and take the necessary action.

Perform the following steps to view the status of an application:

1. From the navigation menu, select **Modules > Volunteers** and then click the **Approval Queue** tab.



Approval Queue

Pending Applications

Details	Photo	First Name	Last Name	Date Of Birth	Status
▶		Diana	Bradbery	04/04/1959	Processing
▶		Diana	Dare	05/05/1964	Action Required: Application Approval
▶		Susan	Doyle	04/11/1957	Action Required: Application on Hold

2. In the **Approval Queue** grid, view the current state of the application in the **Status** column. The following statuses are available:
   - **Processing** – The Raptor System is processing the application and no action can be taken until the processing is complete.
   - **Action Required: Review Alert(s)** – This informs the Volunteer Coordinator that the applicant has one or more possible sex offender alerts; they need to review the alerts to determine if they are a match to the applicant.
   - **Action Required: Review Background Check** – This informs the Volunteer Coordinator that a criminal record has been returned and they need to review it.
   - **Action Required: Application on Hold** – This status is only associated with the Texas DPS; it displays when the Volunteer Coordinator has put the application on hold until more information can be obtained to approve the application.
   - **Action Required: Complete Requirement(s)** – This status indicates that one or more requirements and/or required documents need to be reviewed and marked as complete before moving the application further through the process.
   - **Action Required: Application Approval** – This status informs the Volunteer Coordinator that the application is ready for final approval.
   - **Approved: Awaiting Expiration** – No action required from the Volunteer Coordinator. When the volunteer's current term expires, this new application will be applied to the volunteer's profile.

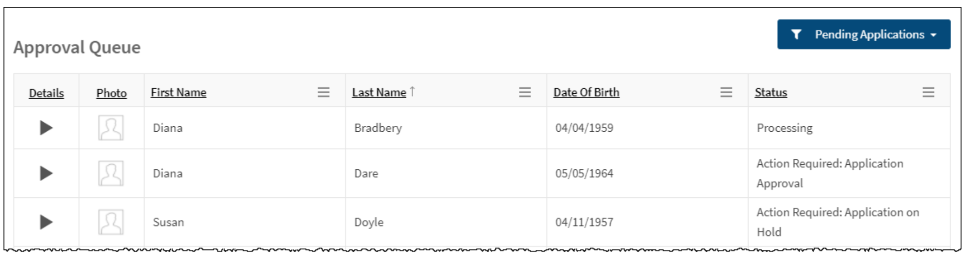
View Application Details

You can access and view the details of an application in the **Approval Queue** grid on the **Approval Queue** workspace.

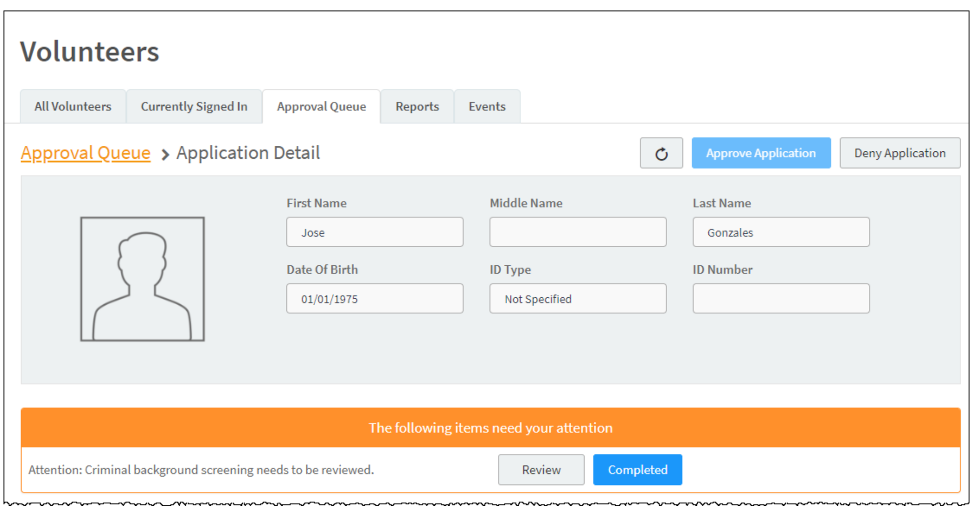
> **Note:**
> You can also view the application details from the **New Applications** grid and **Batch Applications** grid if you have the Texas DPS screening feature enabled.

Perform the following steps to view the application details from the **Approval Queue** grid:

1. From the navigation menu, select **Modules > Volunteers** and then click the **Approval Queue** tab.



2. In the **Approval Queue** grid, click the ▶ icon in the **Details** column for the application.



If the application requires attention prior to approval, the items that need to be addressed are displayed under the call to action banner.

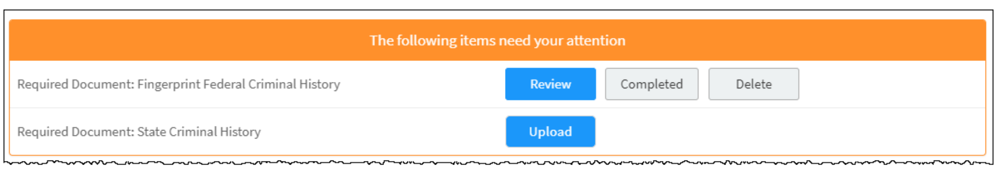
For example, if an applicant must provide required documents for a function specified in their application, these items will be listed in this area. Also, if a possible offender alert has been triggered, you can review the alert here prior to approving the applicant. See Possible Offender Alert for Volunteer Applicant.

In addition, if there are requirements associated with functions where an applicant has selected these functions, the requirements must be satisfied and marked as complete before you can complete the approval process.

Refresh Button

The **Refresh** button reloads the contents on the page so that you can stay on the page while the application continues processing. For example, if the applicant has a possible sex offender alert and after reviewing the alerts, you click the **Refresh** button to proceed to the next step in the approval process. Although processing from one step to the next is fast, it may be necessary to click the button more than once to totally refresh the screen.

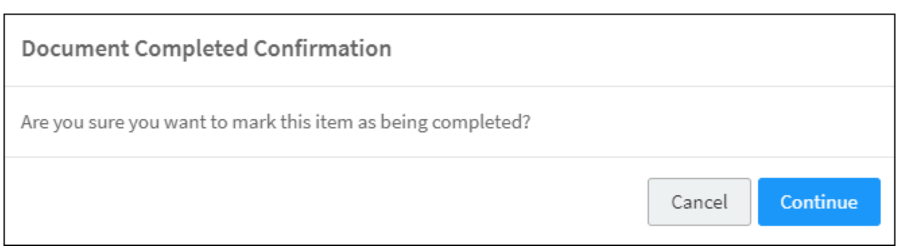
3. On the **Application Detail** workspace, if documentation is required prior to approval, click **Upload** and navigate to the document.



4. Once the document is uploaded, click **Review** to verify that everything is accurate, and then click **Completed** to indicate the requirement has been satisfied.

   If you want to remove the document to replace it with another uploaded document, click **Delete**.

5. On the **Document Completed Confirmation** dialog, click **Continue**.

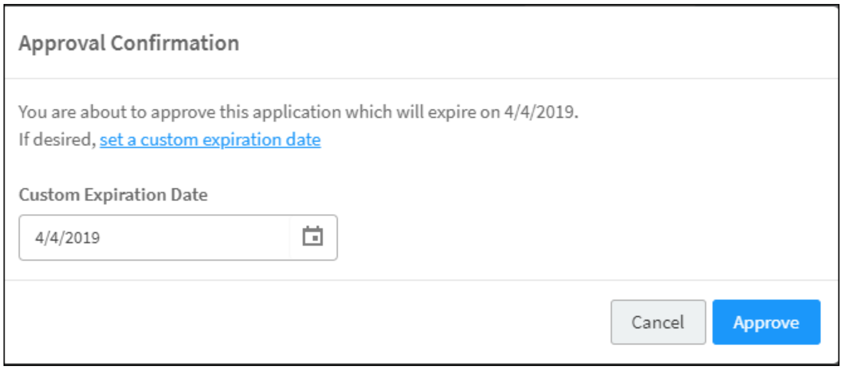


The item is removed from the list.

After all items have been addressed, the call to action banner displays the message *Final application approval is required*.

6. Click **Approve Application**.

   The **Approval Confirmation** dialog is displayed.



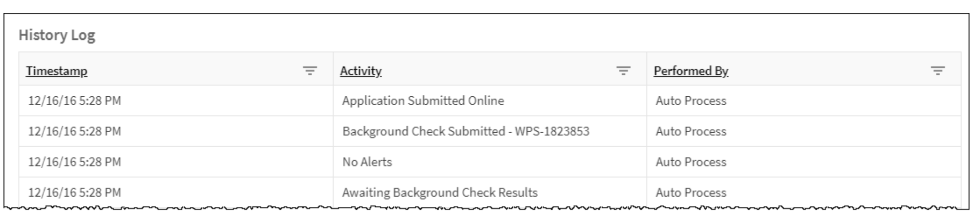
7. If you want to specify a custom expiration date, click the link and select the date from the calendar.
8. Click **Submit** to approve the application.

View Application History Log

The **History Log** grid on the **Application Detail** workspace displays the date and time of activity related to the volunteer application process.

Perform the following steps to view the application history log:

1. From the navigation menu, select **Modules > Volunteers**.
2. On the **All Volunteers** workspace, click the ▶ icon next to the volunteer's name to expand the **Volunteer Detail** workspace.
3. In the **Application History** grid, click the ▶ icon and navigate to the **History Log**.



History Log

Timestamp	Activity	Performed By
12/16/16 5:28 PM	Application Submitted Online	Auto Process
12/16/16 5:28 PM	Background Check Submitted - WPS-1823853	Auto Process
12/16/16 5:28 PM	No Alerts	Auto Process
12/16/16 5:28 PM	Awaiting Background Check Results	Auto Process

The **History Log** includes the date and time of the activity, the activity description and the name of the user performing the activity. Some activities that display in this log include:

- Application Submitted Online
- Background Check Submitted
- Alerts Ready for Review - Indicates there are possible sex offender alerts ready to be reviewed by a user with the Can Approve Volunteers permission.

- No Alerts - Indicates there are no possible sex offender alerts associated with the volunteer applicant.
- Awaiting Background Check Results - Indicates the background check is in progress and results have not yet been returned.
- Background Check Results Ready for Review - Indicates the background check has been returned but needs reviewed.
- Background Check Reviewed - Indicates the background check has been reviewed.
- Background Check Results - No Criminal Record - Indicates the background check returned no criminal record for the volunteer applicant.
- Requirement <name of requirement> Complete
- Application Approved
- Application Denied; Applicant is Banned from Reapplying

View Required Documents

The **Required Documents** grid on the **Application Detail** workspace displays the required documents for volunteer applicants, the upload timestamp, status, the user who performed the upload and an option to preview the document.

Perform the following steps to view the application history log:

1. From the navigation menu, select **Modules > Volunteers**.
2. On the **All Volunteers** workspace, click the icon next to the volunteer's name to expand the **Volunteer Detail** workspace.
3. In the **Required Documents** grid, click the icon in the **Options** column to preview the document.

Required Documents

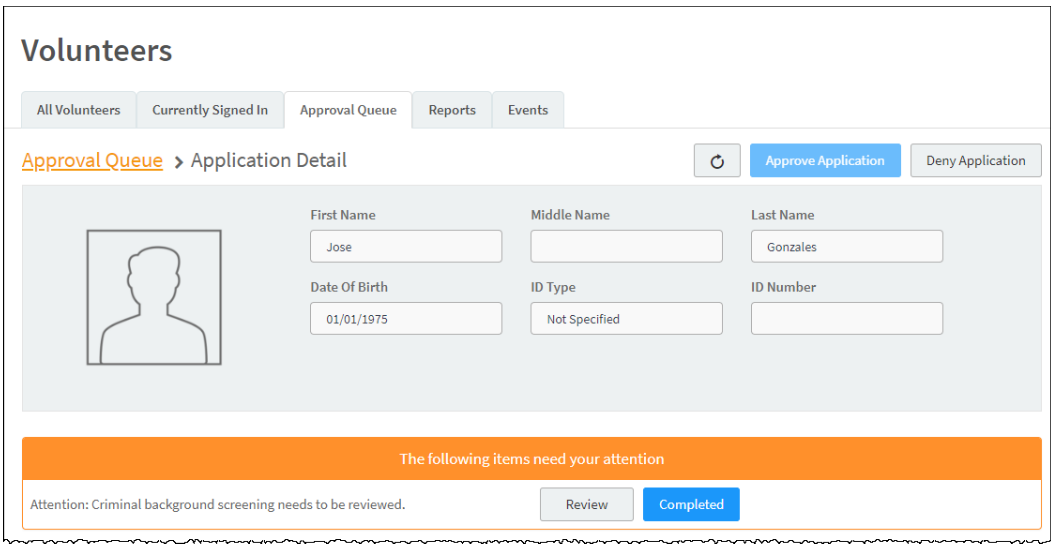
Name	Upload Timestamp	Status	Performed By	Options
Fingerprint Federal Criminal History	03/12/18 11:03 AM	Completed	Diana DistrictAdmin	
State Criminal History	03/12/18 11:11 AM	Completed	Diana DistrictAdmin	

> **Note:**
> After an application has been approved or denied, the uploaded documents are still accessible from the application.

Possible Offender Alert for Volunteer Applicant

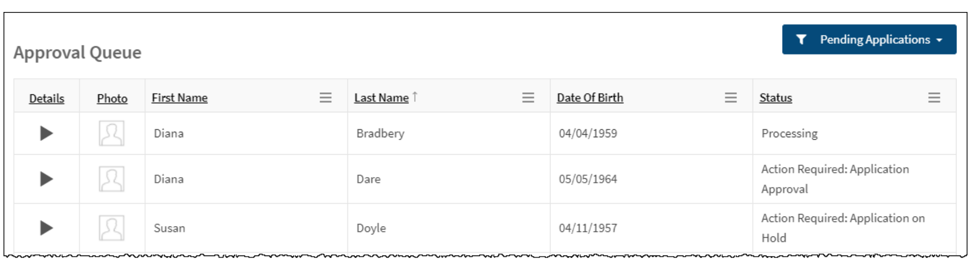
> **Note:**
> The offender check for volunteer applications feature must be enabled by Raptor.

If a **Possible Offender Alert** is generated from a volunteer applicant, the volunteer coordinator will be prompted to review the information before approving the applicant.

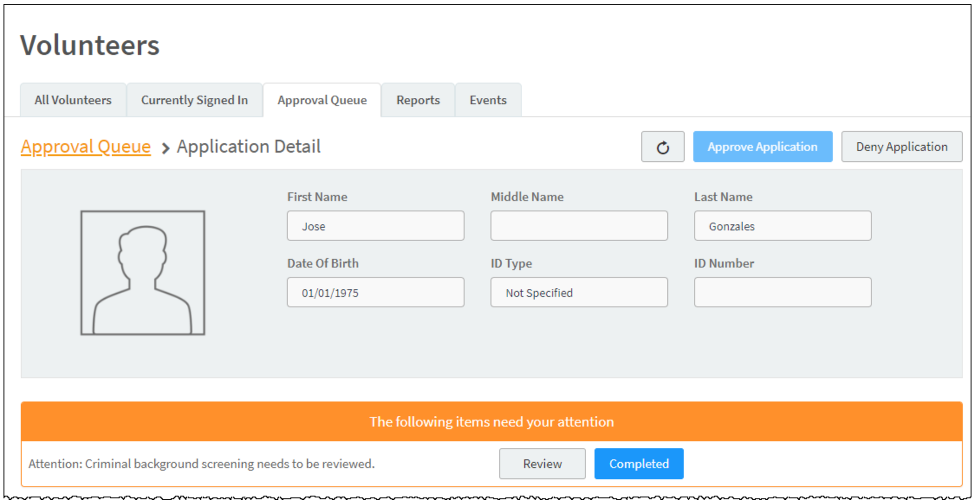


Perform the following steps to review the information:

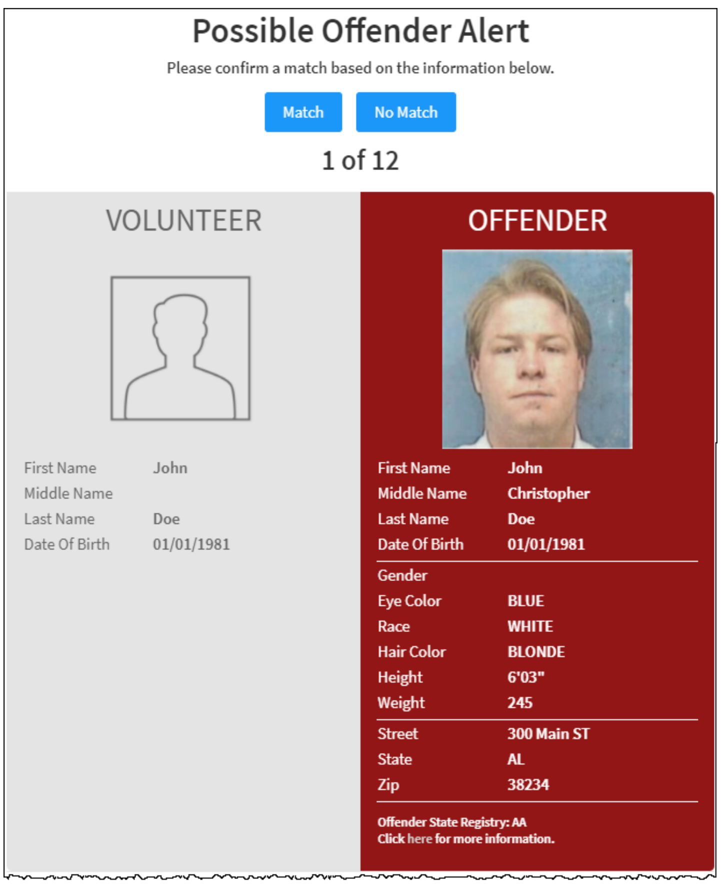
1. From the navigation menu, select **Modules > Volunteers** and then click the **Approval Queue** tab.



2. In the **Approval Queue** grid, click the ▶ icon in the **Details** column for the application.



The **Possible Offender Alert** displays.



3. Analyze the search results. Because there can be multiple possible matches, it is very important that you carefully compare the information displayed on the screen for

Volunteer and the **Offender** information.

It is recommended that you compare the address to verify a match. Not all states provide a photo and details of their offenders.

> **Note:**
> Raptor also matches on offender alias names. If this occurs, an *Alias Match* message displays below the offender's photo.

4. Confirm whether the information displayed on your screen is a match to the person in the application. Perform one of the following actions:

   Match

   If the information displayed on the screen is a match, click **Match**.

   You are prompted to confirm the match. Click **Yes, it is a match** to confirm, or click **Cancel**.

   The number of matches and the number of total **Possible Offender Alerts** are recorded in the **History Log** on the **Volunteer Application**, which will force the application to be manually approved (if the *Automatically Approve When Requirements Satisfied* feature is set to **Yes** on the **Volunteer Application Settings** workspace).

   > **Note:**
   > No alert notifications are sent to defined contacts when there is a match.

   No Match

   If the information displayed on the screen does not match your visitor's information, click **No Match**. If there are multiple records, the next possible match will display on the screen.

5. After the applicant has been reviewed, the volunteer coordinator can approve or deny the application using the instructions in Manually Approve Application.

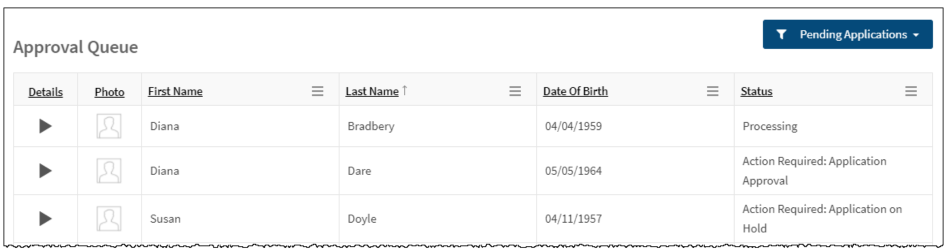
Criminal Background Screening for Volunteer Applicant

If the *Criminal Background Screening* feature is enabled and a criminal record is returned for a volunteer applicant, the volunteer coordinator will receive an email indicating that a volunteer application needs your attention.

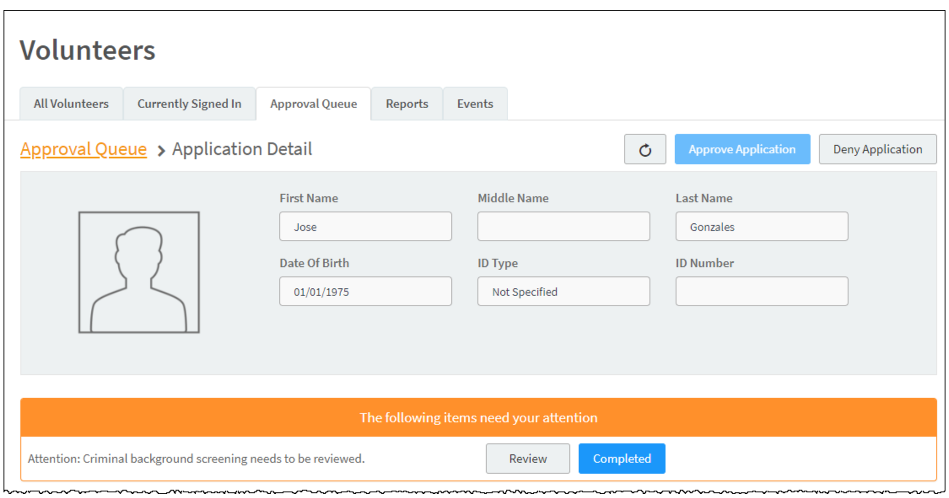
> **Note:**
> Applicants under age 18 will not be screened.

Perform the following steps to review the information.

1. From the navigation menu, select **Modules > Volunteers** and then click the **Approval Queue** tab.



2. In the **Approval Queue** grid, click the ▶ icon in the **Details** column for the application.



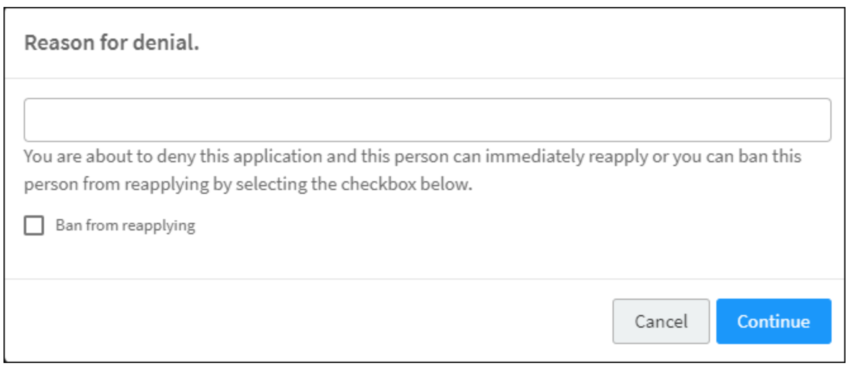
If the criminal background screening determines that the application needs additional review, an item *Criminal background screening needs to be reviewed* displays in the call to action section on the **Application Detail** workspace and an entry *Background Check Results Ready For Review* is logged in the **History Log**.

> **Note:**
> The user must have the *Can View Background Check Information* permission to view the criminal record for an applicant.

3. Click **Review** to view the criminal background search results.
4. After reviewing the criminal record, click **Completed**.
5. Click **Approve Application** or **Deny Application**.

> **Note:**
> The **Approved Application** button is only available if all requirements have been satisfied. Otherwise it is greyed out.

If you click **Deny Application**, the **Reason for denial** dialog displays.



6. Enter the reason why the application has been denied.
7. If you want to ban the applicant from reapplying, select the **Ban from reapplying** check box.
8. Click **Continue**. If you want to cancel your action, click **Cancel**.

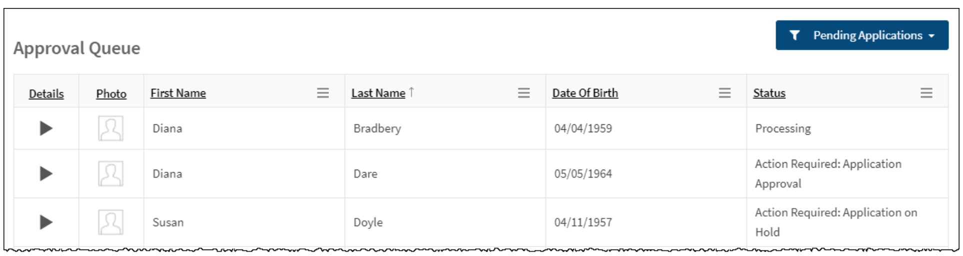
WATCH Criminal Background Screening for Volunteer Applicant

If you have the *Criminal Background Screening* feature enabled and are using Washington Access To Criminal History (WATCH), when a criminal record is returned for a volunteer applicant, the volunteer coordinator will receive an email indicating that a volunteer application needs attention, and the status *Attention: Criminal background screening needs to be reviewed* is displayed in the **Approval Queue** grid.

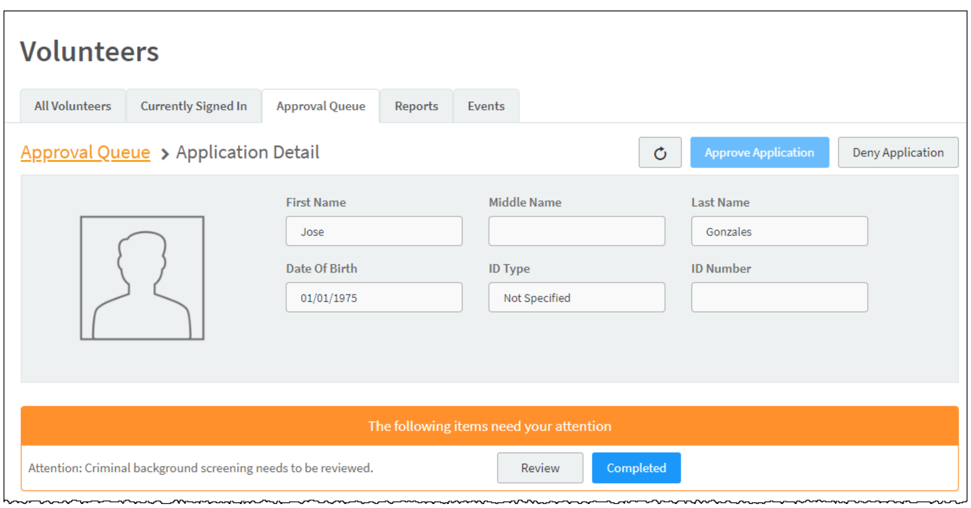
> **Note:**
> - This feature is only available in the state of Washington.
> - Applicants under age 18 are not screened.

Perform the following steps to review the information:

1. From the navigation menu, select **Modules > Volunteers** and then click the **Approval Queue** tab.



2. In the **Approval Queue** grid, click the ▶ icon in the **Details** column for the application.



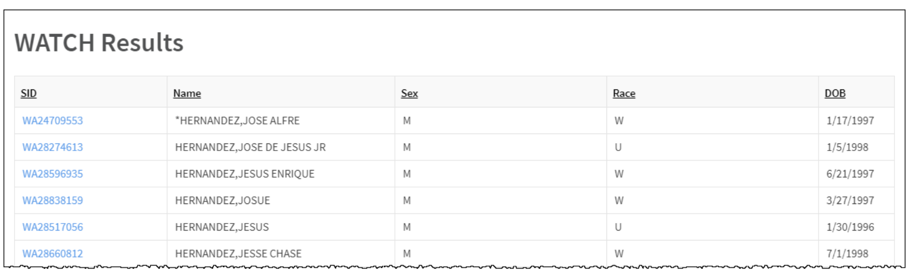
> **Note:**
> The user must have the *Can View Background Check Information* permission to view the criminal record for an applicant.

3. Click **Review** to view the criminal background search results in a new window. One of the following WATCH responses is returned based on the applicant's name and birth date:
   - **Exact Match** - There was a record in their criminal history system with an exact match to the name and date of birth of the applicant. Click the link in the **SID** column to review the results.

WATCH Results

SID	Name	Sex	Race	DOB
WA99999999	*GREENE,PAUL C	M	U	10/4/1990

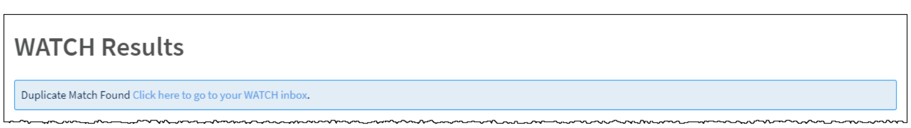
   - **Candidate List** - There was more than one record returned where the name and date of birth are close enough to be considered a possible match. Click the link in the **SID** column to review each of the results.



WATCH Results

SID	Name	Sex	Race	DOB
WA24709553	*HERNANDEZ,JOSE ALFRE	M	W	1/17/1997
WA28274613	HERNANDEZ,JOSE DE JESUS JR	M	U	1/5/1998
WA28596935	HERNANDEZ,JESUS ENRIQUE	M	W	6/21/1997
WA28838159	HERNANDEZ,JOSUE	M	W	3/27/1997
WA28517056	HERNANDEZ,JESUS	M	U	1/30/1996
WA28660812	HERNANDEZ,JESSE CHASE	M	W	7/1/1998

   - **Duplicate Match Found** - Indicates there may be two or more exact name and date of birth matches to the applicant and a more advanced search must be conducted. Click the link **Click here to go to your WATCH inbox**, login to WATCH, and locate the applicant's entry to access the necessary WATCH form.



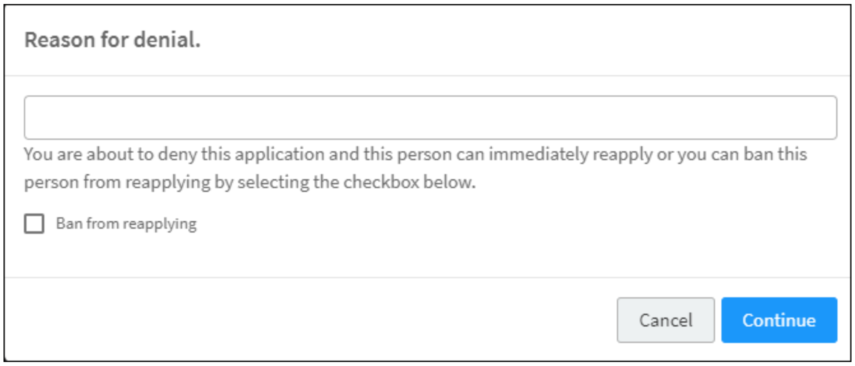
WATCH Results

Duplicate Match Found Click here to go to your WATCH inbox.

4. After reviewing the RAPsheet(s), click **Completed**.

5. Click **Approve Application** or **Deny Application**.

   If you click **Deny Application**, the **Reason for denial** dialog displays.

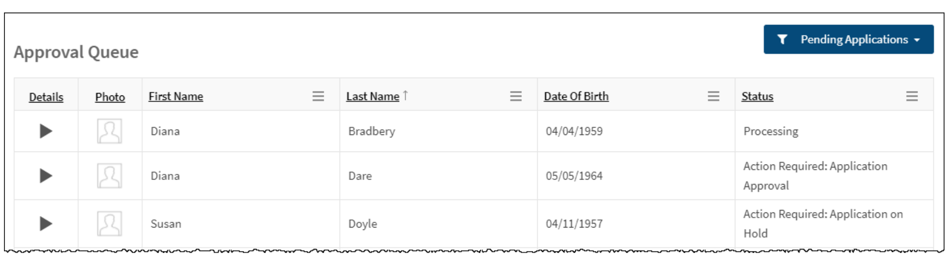


6. Enter the reason why the application has been denied.
7. If you want to ban the applicant from reapplying, select the **Ban from reapplying** check box.
8. Click **Continue**. If you want to cancel your action, click **Cancel**.

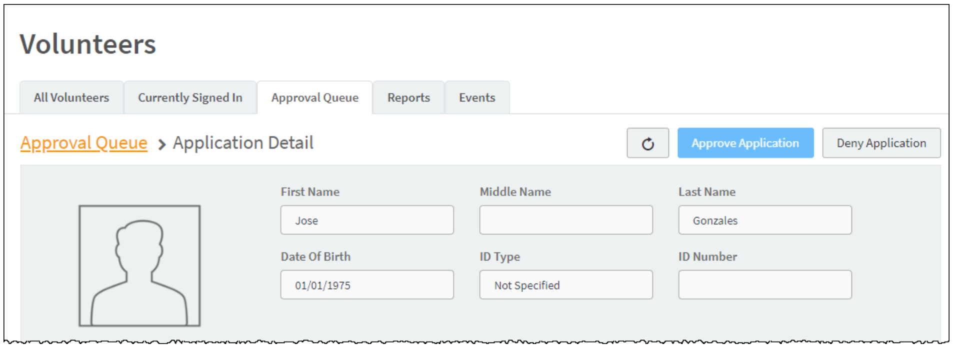
Manually Approve Application

Perform the following steps to manually approve a volunteer application:

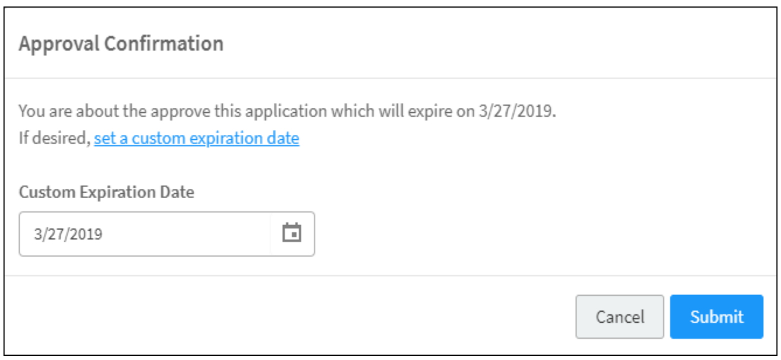
1. From the navigation menu, select **Modules > Volunteers** and then click the **Approval Queue** tab.
2. In the **Approval Queue** grid, select **Pending Applications** from the **Filter** drop-down list.



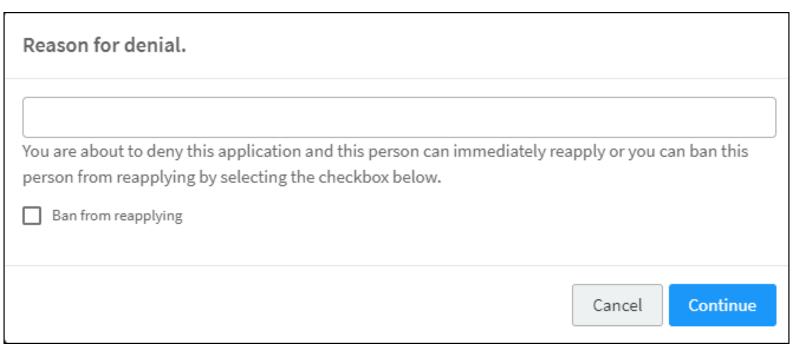
3. In the **Details** column, click the ▶ icon for the volunteer applicant.



4. On the **Application Detail** workspace, click **Approve Application** or **Deny Application**.
   - If you click **Approve Application**, the **Approval Confirmation** dialog displays.



     a. If you want to specify a custom expiration date, click the link and select the date from the calendar.
     b. Click **Submit** to approve the application or **Cancel** to cancel the action.
   - If you click **Deny Application**, the **Reason for denial** dialog displays.



a. Enter the reason why the application has been denied.

b. If you want to ban the applicant from reapplying, select the **Ban from reapplying** check box.

c. Click **Continue**. If you want to cancel your action, click **Cancel**.

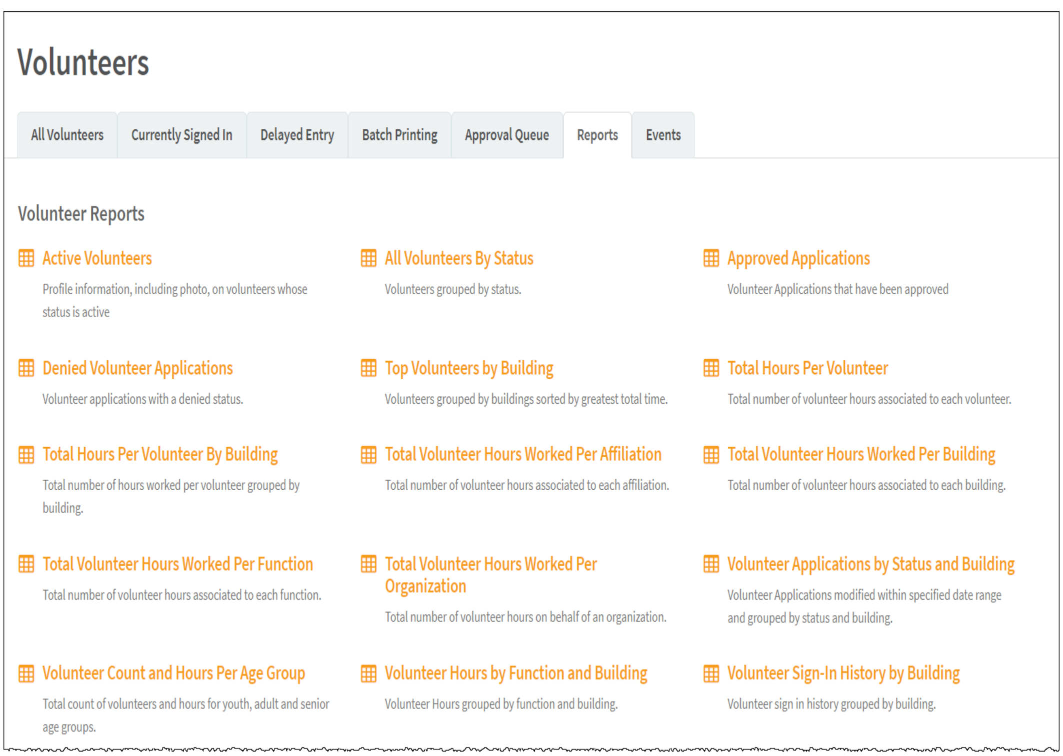
If the Volunteer Portal is enabled and the applicant is approved, a Volunteer Portal user account is automatically created and an email with instructions on how to log in is sent to the newly approved volunteer.

If the automated process is unable to create a Volunteer Portal user account, the volunteer coordinator can manually create a user account for the Volunteer Portal. See Create Volunteer Portal User Account.

> **Note:**
> For active volunteers that have submitted new applications that have been approved, the volunteer's profile will not be updated with the information on the new application until their expiration date, at which time their volunteer profile will be replaced with information from the newly approved application.

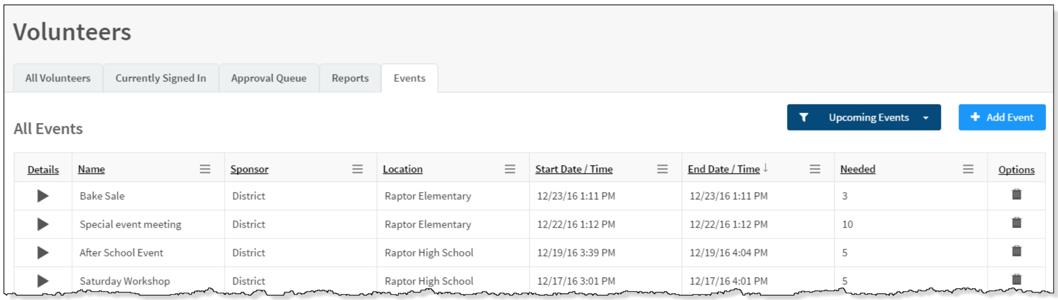
Volunteer Reports

Use the **Reports** tab to access and run any of the available volunteer reports. See Volunteer Reports.



Events

The **Events** tab is used by the Volunteer Coordinator to manage events, such as creating an event, viewing all events, modifying an event and deleting an event. You must have the *Can Manage Events* permission to see this tab.



The events that have been created are displayed in the **All Events** workspace.

Use the **Filter** drop-down to narrow the search for specific events. You can filter to display **Scheduled Events**, **Past Events** and **All Events**.

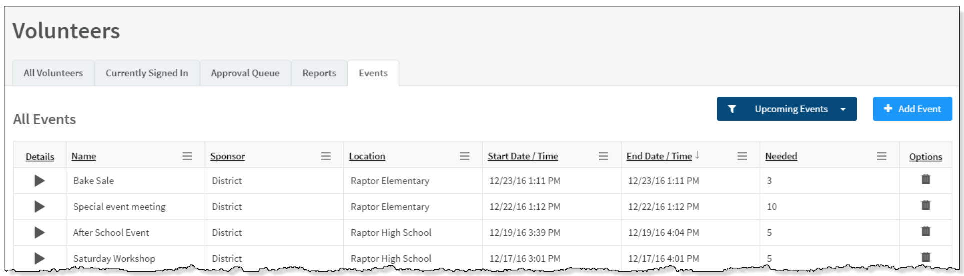
You can perform the following tasks from this workspace:

- Add an event
- View Volunteers Signed Up for Event
- Send Email to All Volunteers Signed Up for Event
- Send Email to All Eligible Volunteers for Event
- Sign Up Volunteers for Event
- Send Email to Individual Volunteer Signed Up for Event
- Remove Volunteer from Event

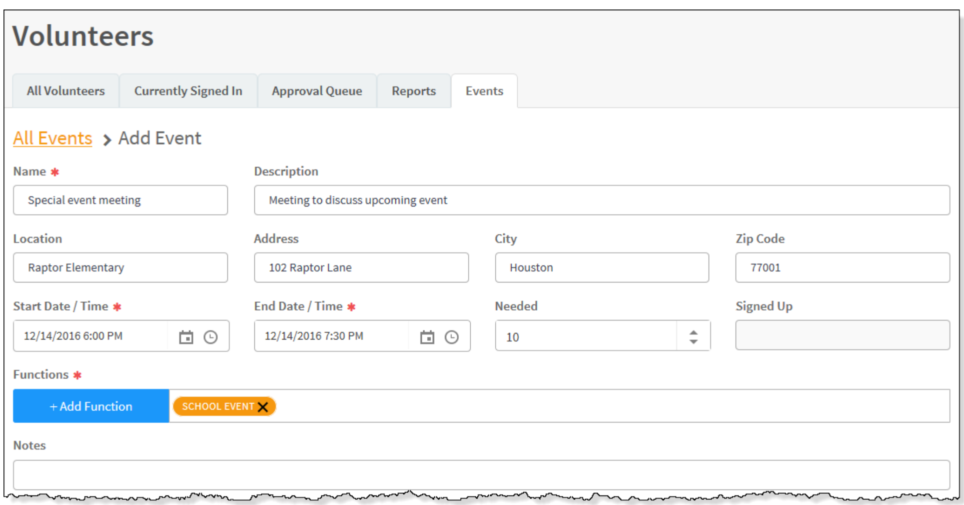
Add Event

Volunteer events can be created at the building level or client level (All Buildings). Perform the following steps to add an event:

1. From the navigation menu, select **Modules > Volunteers** and then click the **Events** tab.



2. On the **All Events** workspace, click **Add Event**.



3. On the **Add Event** workspace, complete the following fields:
   - **Name*** - Enter a name for the event.
   - **Description** - Enter information that describes the event.
   - **Location** - Enter the name of the location (building) where the event will occur.
   - **Address** - Enter the physical address of the event location.
   - **City/Zip Code** - Enter the name of the City and postal zip code for the location of the event.

- **Start Date/Time*** - Click the icon to select the date of the event and then click the icon to select the time the event starts.
- **End Date/Time*** - Click the icon to select the date the event ends and then click the icon to select the time the event ends.
- **Needed** - Select the number of volunteers needed to help with the event.
- **Signed Up** - This read-only field indicates the number of volunteers who have already signed up for the event.
- **Functions*** - Click **Add Function** and select the type of event from the drop-down list.

> **Note:**
> Only volunteers that have been approved for the **Functions** in the event detail, can sign up for that event.

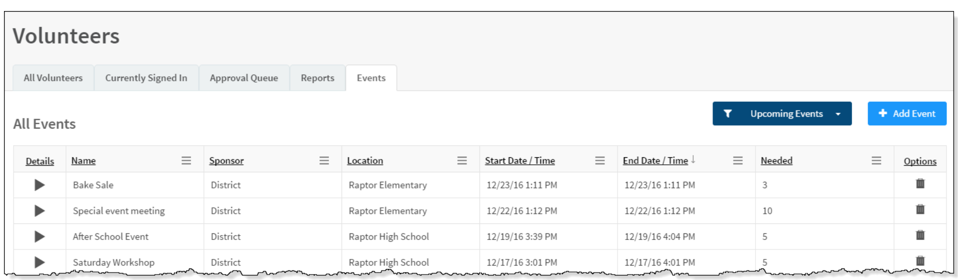
- **Notes** - Enter any additional notes about the event.

4. Click **Save**.

View Volunteers Signed Up for Event

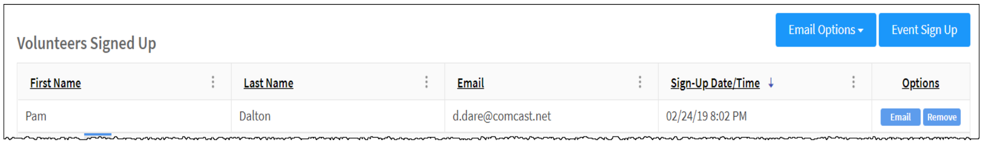
Volunteer Coordinators can view who has signed up to volunteer for an event from the **Event Detail** workspace. Perform the following steps to view who has signed up:

1. From the navigation menu, select **Modules > Volunteers** and then click the **Events** tab.



2. On the **All Events** workspace, click the ▶ icon next the event you want view.
3. On the **Event Detail** workspace, you can view the number of volunteers who have signed up for the event in the **Signed Up** field in the upper portion of the workspace.
4. Navigate to the **Volunteers Signed Up** grid to view the volunteers who have signed

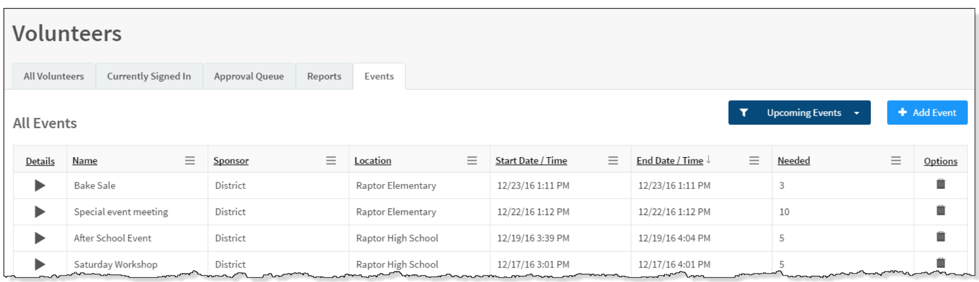
up for the event.



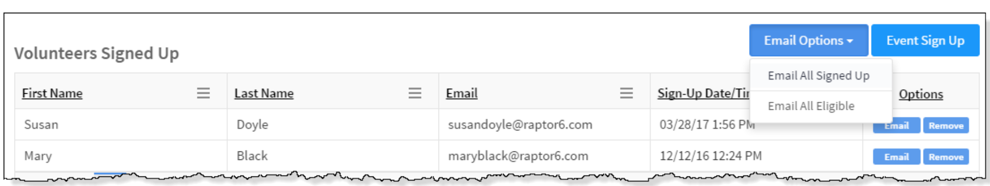
Send Email to All Volunteers Signed Up for Event

Users with the *Can Manage Events* permission can send an email to all volunteers who have signed up for a specific event. Perform the following steps to send an email to all volunteers who have signed up for the event:

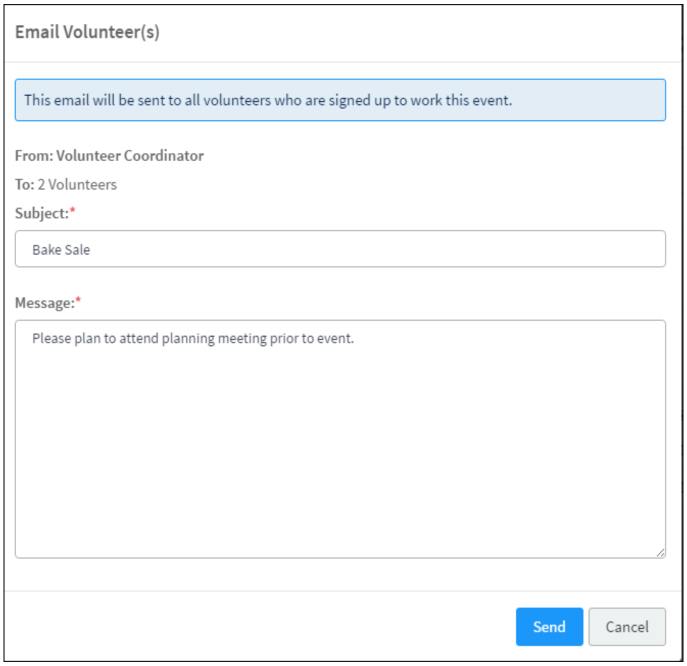
1. From the navigation menu, select **Modules > Volunteers** and then click the **Events** tab.



2. On the **All Events** workspace, click the ▶ icon next to the event to expand the **Event Detail**.
3. In the **Volunteers Signed Up** grid, click **Email Options** and select **Email All Signed Up** from the drop-down list.



4. Enter the email **Subject** and **Message**, and then click **Send**.

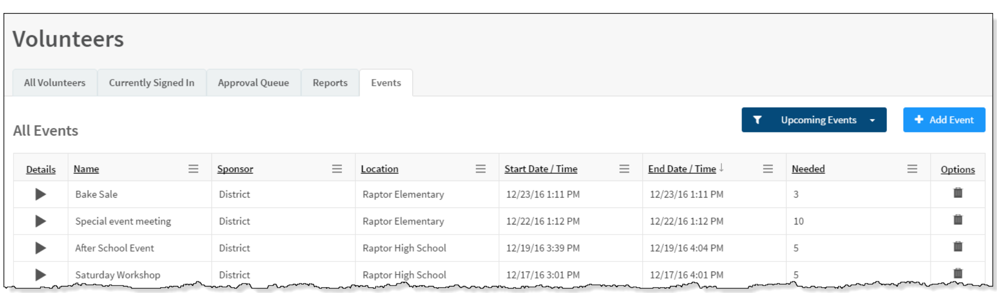


Send Email to All Eligible Volunteers for Event

Users with the *Can Manage Events* permission can send an email to all eligible volunteers for an event based on the function(s) selected for the event. An eligible volunteer is one who has an active status, is approved for one or more functions that are associated with an event, and who has not already signed up to volunteer for the event.

Perform the following steps to view all eligible volunteers for an event:

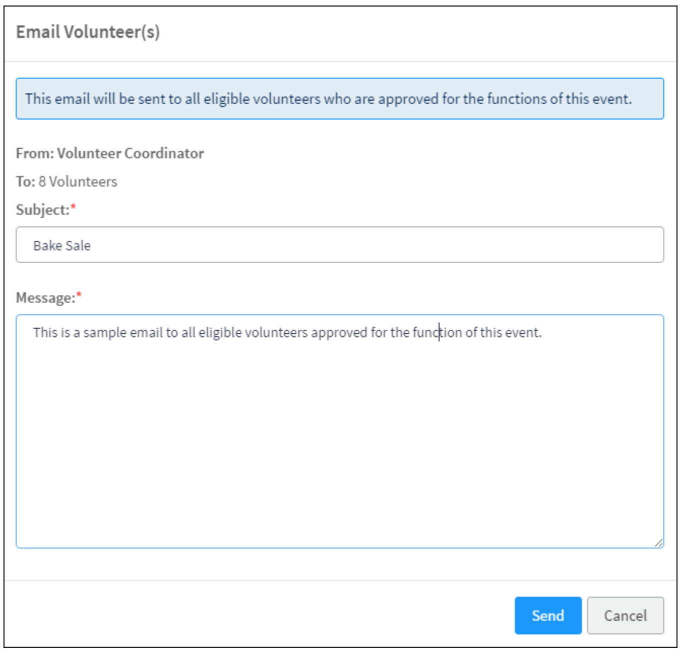
1. From the navigation menu, select **Modules > Volunteers** and then click the **Events** tab.



2. On the **All Events** workspace, click the ▶ icon next to the event to expand the **Event Detail**.

3. In the **Volunteers Signed Up** grid, click **Email Options** and select **Email All Eligible** from the drop-down list.

> **Note:**
> This email will be sent to all eligible volunteers who are approved for the functions of this event.

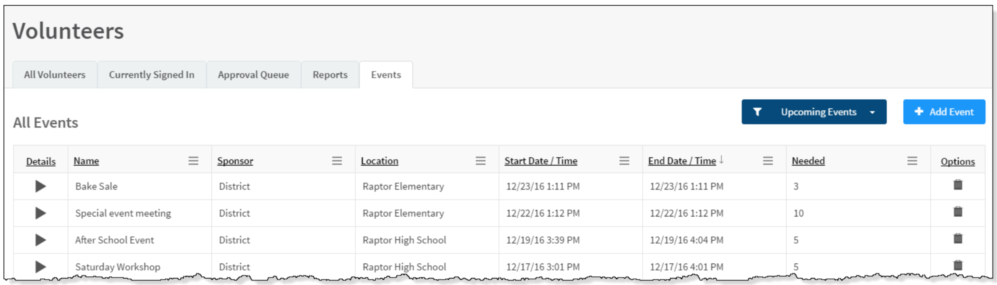


4. Enter the email **Subject** and **Message**, and then click **Send**.

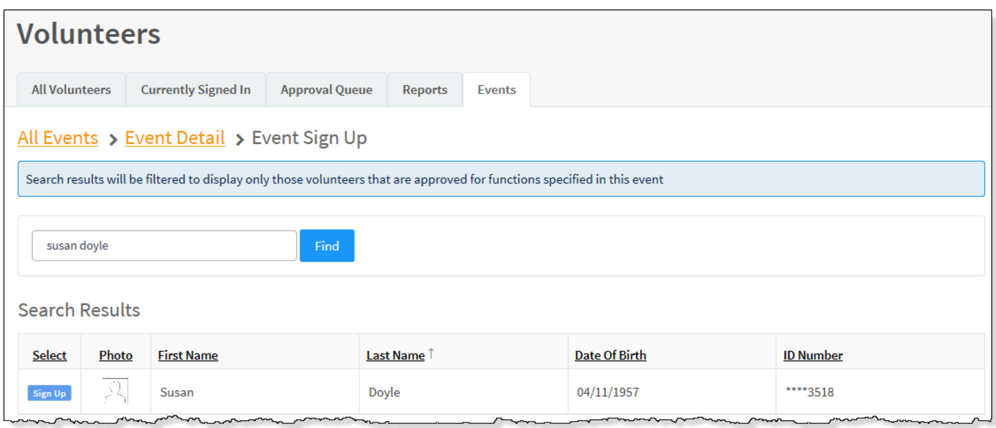
Sign Up Volunteers for Event

Volunteer Coordinators can sign up volunteers for an event using the **Events** tab on the **Volunteers** workspace. Perform the following steps to sign up volunteers for an event:

1. From the navigation menu, select **Modules > Volunteers** and then click the **Events** tab.



2. On the **All Events** workspace, click the ▶ icon next the event you want to add volunteers.
3. On the **Event Detail** workspace, navigate to the **Volunteers Signed Up** grid and click **Event Sign Up**.
4. Enter the volunteer's **First** and/or **Last Name** in the text field and click **Find**.



5. In the **Search Results** area, click **Sign Up** next to the volunteer's name.

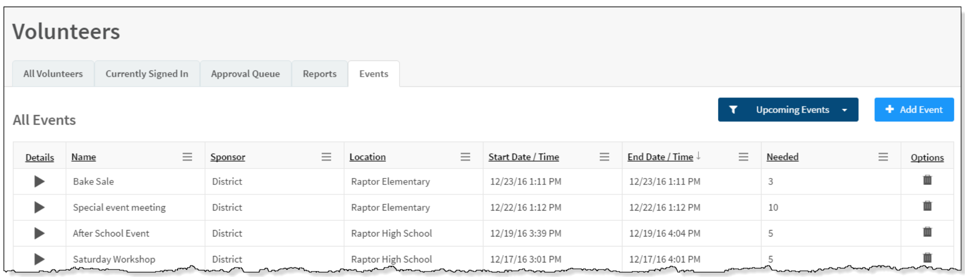
> **Note:**
> Only those volunteers that match the search criteria and the **Functions** selected in the event detail will be returned in the **Search Results**.

The volunteer displays in the **Volunteers Signed Up** grid for the event and the number in the **Signed Up** field in the event detail increments.

Send Email to Individual Volunteer Signed Up for Event

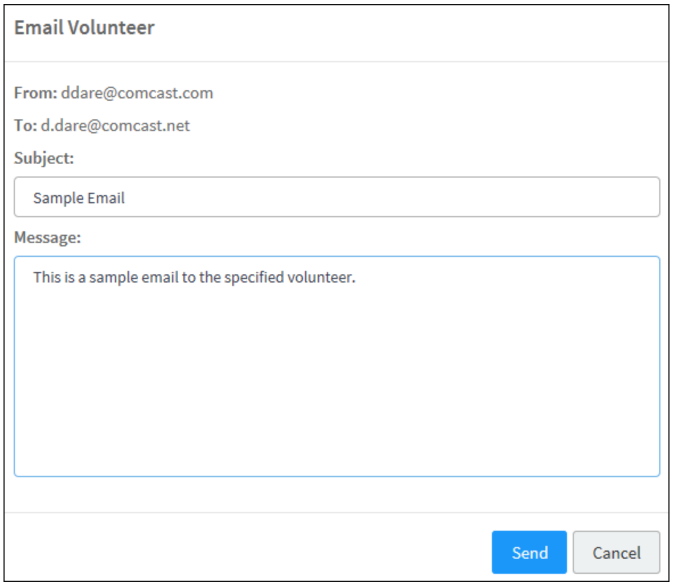
Volunteer Coordinators can send an email to those volunteers who have signed up for an event from the **Event Detail** workspace. Perform the following steps to send an email to an individual volunteer who is signed up for an event:

1. From the navigation menu, select **Modules > Volunteers** and then click the **Events** tab.



2. On the **All Events** workspace, click the ▶ icon next to the event to expand the **Event Detail**.
3. In the **Volunteers Signed Up** grid, click **Email** for the volunteer who you want to send an email.

> **Note:**
> If the volunteer does not have an email address in their profile, the **Email** button does not display.

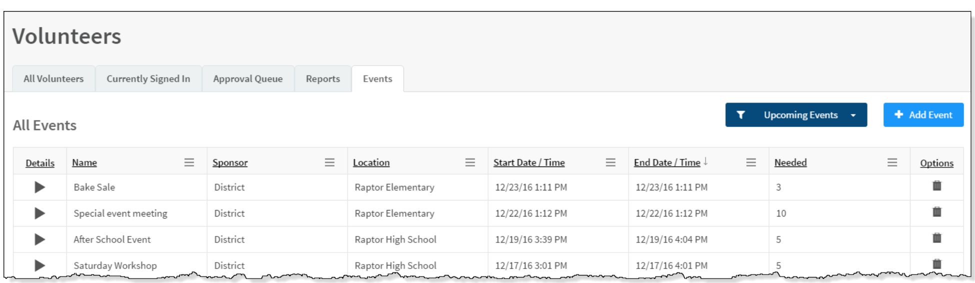


4. Enter the email **Subject** and **Message**, and then click **Send**.

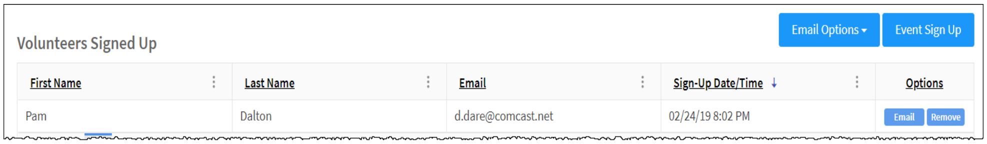
Remove Volunteer from Event

Event Coordinators can remove a volunteer who is signed up for an event and reset the **Signed Up** number to reflect the change on the **Event Detail** workspace. Perform the following steps to remove a volunteer from an event:

1. From the navigation menu, select **Modules > Volunteers** and then click the **Events** tab.



2. On the **All Events** workspace, click the ▶ icon next to the event to expand the **Event Detail**.
3. In the **Volunteers Signed Up** grid, click **Remove** and then click **Yes** on the **Removal Confirmation** dialog.



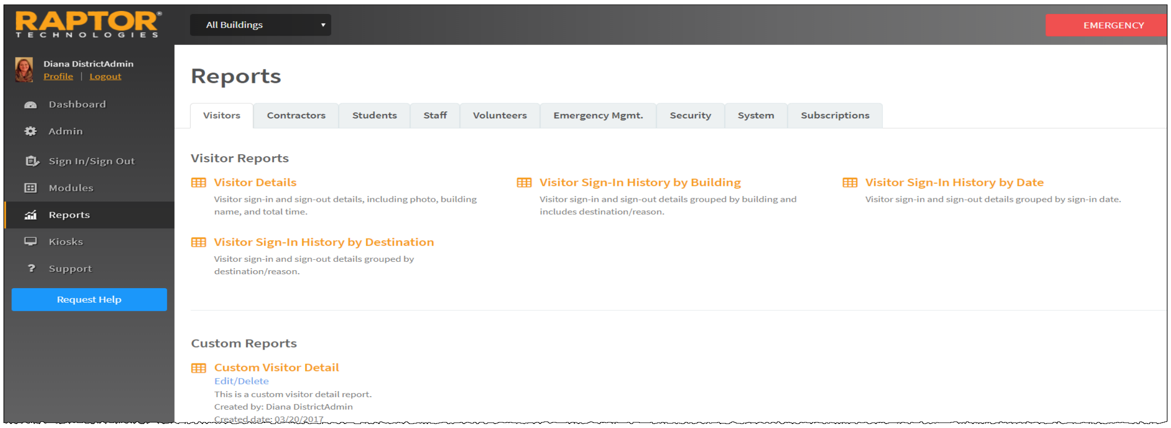
The **Email Removed Volunteer** dialog displays to send the volunteer an email that they have been removed from the event. Complete the **Message** and click **Send**.

If the volunteer does not have an email address in their profile, the **To** field displays null. Click **Cancel** to cancel the email.

Using Reports

The **Reports** workspace provides the reporting functionality in Raptor and organizing the output. After running a report, you can manipulate the contents of the report, export it to a PDF or Excel file, and print the report.

You can also set up report subscriptions from this workspace.



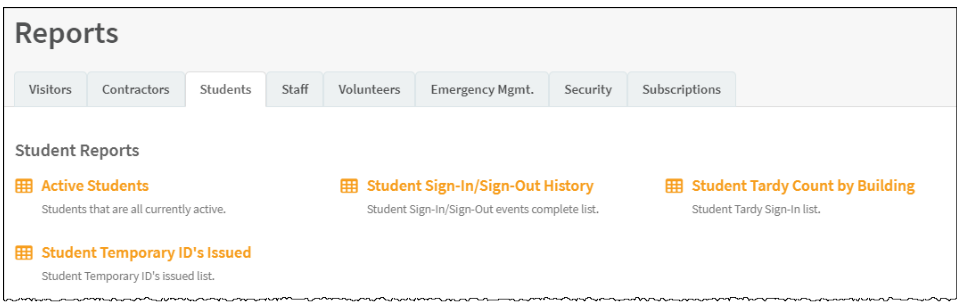
From this workspace, you can:

- Generate reports
- Customize report output
- View reports
- Create and modify custom reports
- Add, modify and delete report subscriptions
- View Volunteer reports

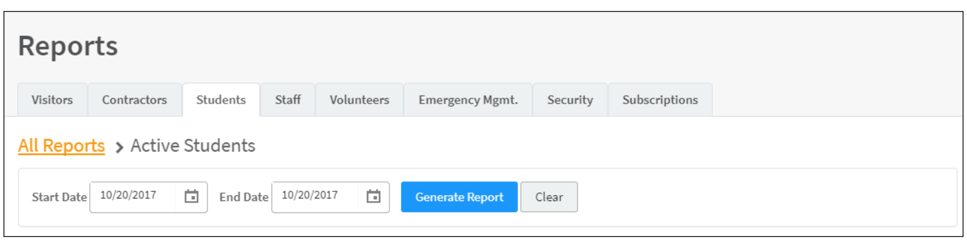
Generate Report

Perform the following steps to generate a report:

1. Access the report using one of the following methods:
   - Select **Reports** in the navigation menu and click the tab for the type of report you want to run (Visitors, Contractors, Students, Staff, Volunteers, Emergency Management or Security).
   - Select **Modules** in the navigation menu and select the module (Visitors, Contractors, Students, Staff, Volunteers or Emergency Mgmt) and then click the **Reports** tab in the module workspace.
2. Select the specific building or All Buildings from the Building Selector.
3. Select the report that you want to generate.



4. If the report includes a date range, click the icon to select the **Start Date** and **End Date** for the date range to include in the report.



5. Click **Generate Report**.

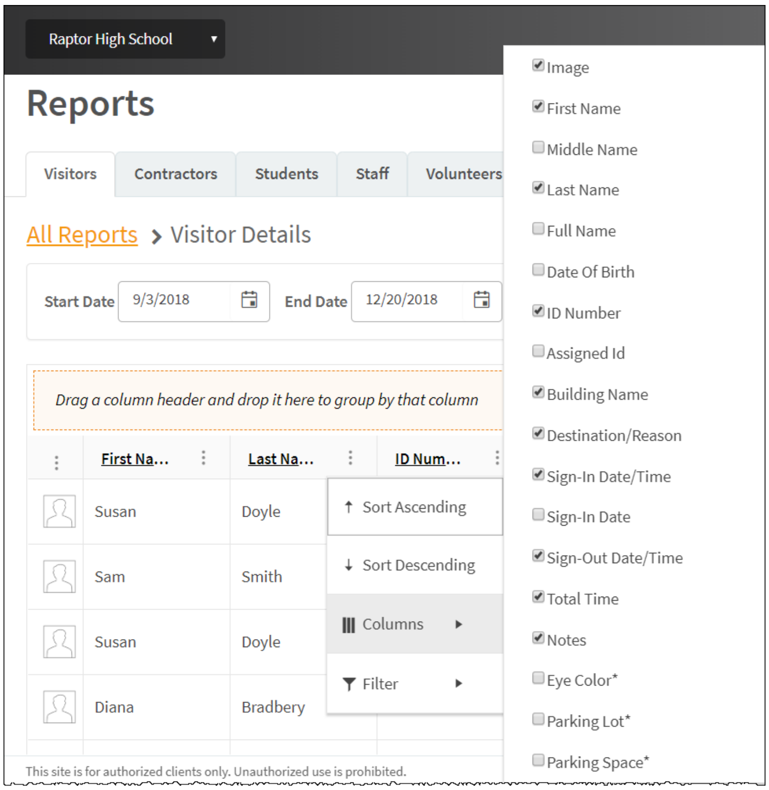
Customize Report Output

Once the report has been generated, you can specify how the information displays.

Specify Columns

Perform the following steps to specify the columns that display in the report:

1. Click the ⋮ icon next to each column heading and select **Columns**.



   - To group based on a column, the column must be visible. Once the grouping has been completed, you can hide the column.
   - You can select to display **Custom Profile** and **Custom Sign-In** fields. You can move the fields from one column position to another but cannot perform any other functions against these fields such as grouping and sorting. When viewed in the report grid, these fields will have an asterisk at the end of their name.

2. Select the check boxes for the columns you want to display in your report. Clear the check boxes for columns you do not want to display in the report.

Sort Output

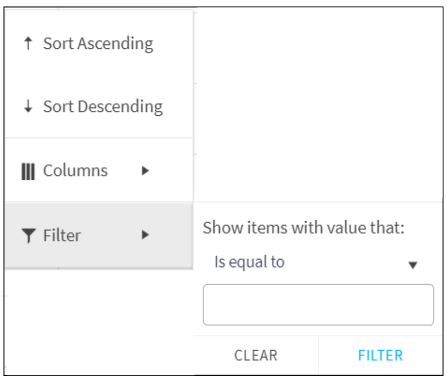
You can sort the output in **Ascending** or **Descending** order using one of the following methods:

- Click the column heading to switch between **Ascending** and **Descending** order.
- Click the ⋮ icon and select **Sort Ascending** or **Sort Descending**.

Filter Output

You can filter the information that displays in the report based on the specified filter criteria.

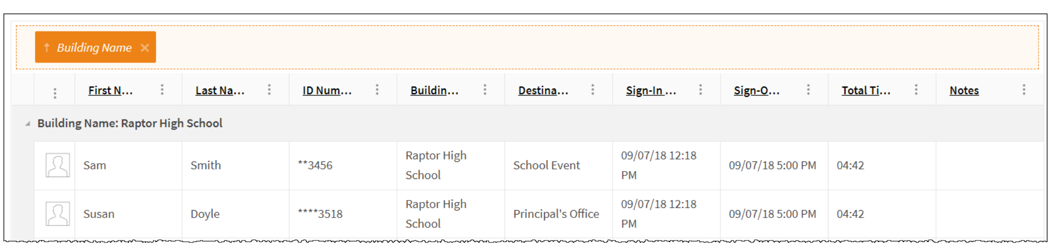
1. Click the ⋮ icon and select **Filter**.



2. In the drop-down, select the operator to use (Is equal to, Is not equal to, Starts with, Contains, Does not contain, Ends with) and enter the filter criteria in the text box.
3. Click **Filter**.

Group Output

You can group the report output on most of the columns that display in the report. For example, if you want to view information grouped by building, simply drag the **Building Name** column into the grouping box (dotted frame above columns). The report content displays by the selected grouping.



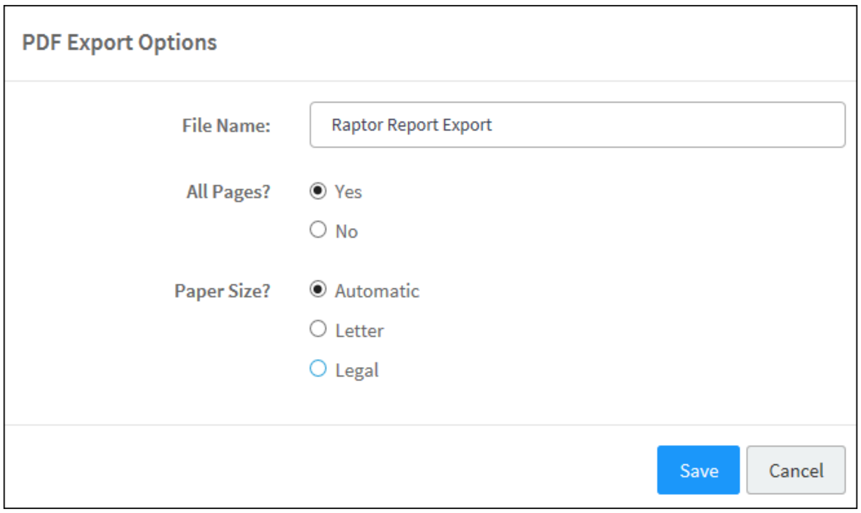
You can drag multiple column headings into the grouping box to display multi-level groups in the report.

Click the **X** to remove an item from the grouping box.

View Report

You can export the report in Excel or PDF format, and then open the file and print the report.

- Select the icon to generate the report in an Excel file. All the report records will also be exported to the Excel file.
- Select the icon to generate the report in PDF.



When you generate the report in PDF format, you also have the following export options:

- Change the name of the output file (File Name).
- Print only the first page of the report or all pages (All Pages, Yes; Only the first page, select No).
- Select the paper size on which to print the report (Paper Size). All options format the report in a Landscape orientation. Depending on the number of columns in the report, you can select:
  - Automatic, which scales the size of the report to fit on the default paper size.
  - Letter, which will format the report on an 8-1/2 x 11-inch page.
  - Legal, which will format the report on an 8-1/2 x 14-inch page.

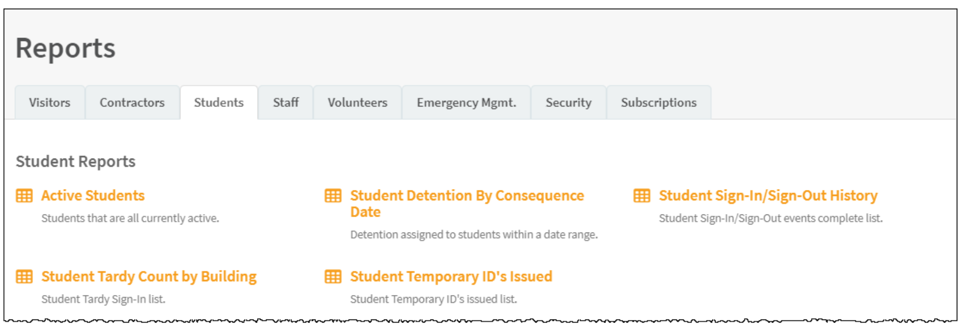
Manage Custom Reports

Users with the *Can Run <Module> Report* permission can create custom reports from the Raptor out-of-the-box reports.

Create Custom Report

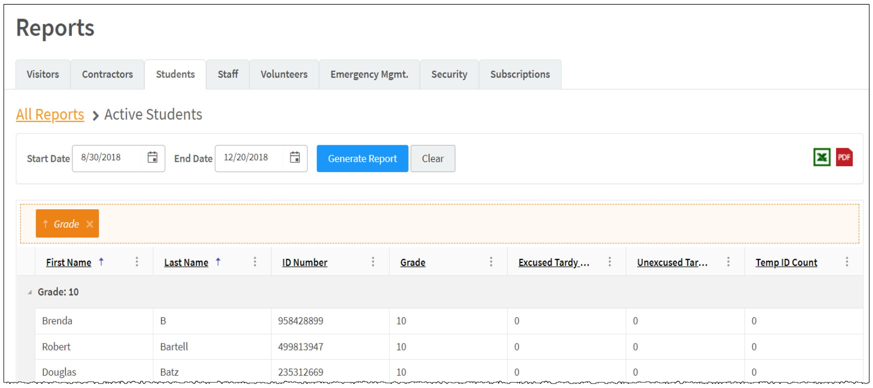
Perform the following steps to create a custom report:

1. Access the report using one of the following methods:
   - Select **Reports** in the navigation menu and click the tab for the type of report you want to run (Visitors, Contractors, Students, Staff, Volunteers, Emergency Management or Security).
   - Select **Modules** in the navigation menu and select the module (Visitors, Contractors, Students, Staff, Volunteers or Emergency Mgmt.) and then click the **Reports** tab in the module workspace.
2. Select the specific building or All Buildings from the Building Selector.
3. Select the report that you want to generate.

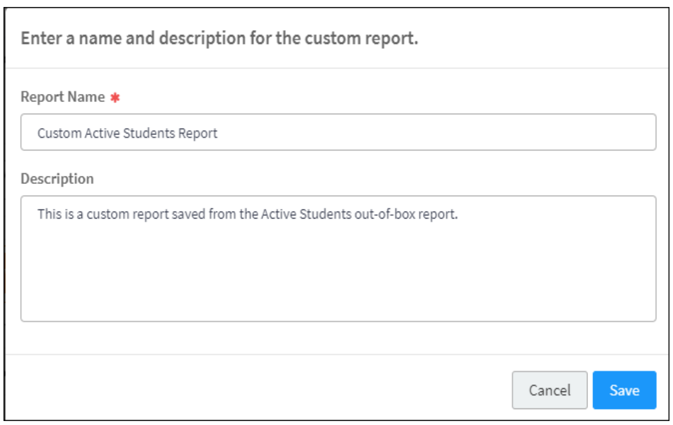


4. If the report includes a date range, click the icon to select the **Start Date** and **End Date** for the date range to include in the report.

5. Click **Generate Report**.

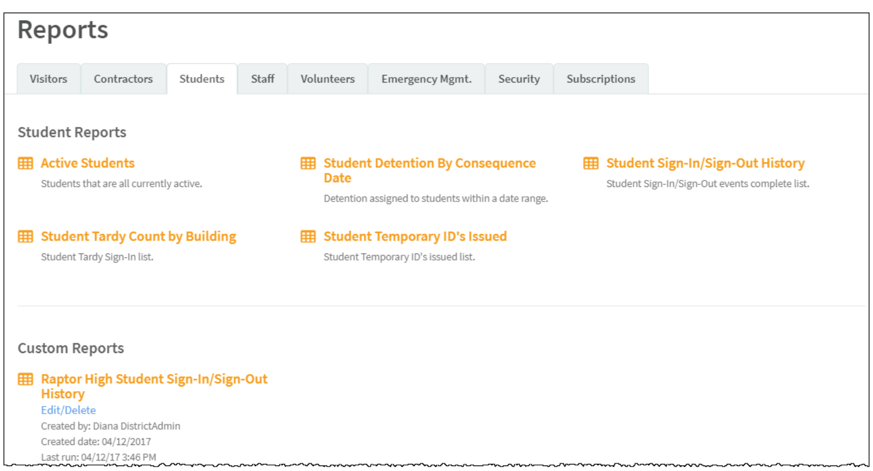


6. Select **Save As** and enter a name for the report (required) and optionally, enter a description of the report.



7. Click **Save**.

   The report displays under **Custom Reports** on the **Reports** workspace.



View and Modify Custom Reports

After a custom report has been created, you can view the reports from the **Custom Reports** area on the **Reports** workspace.

You can also modify the custom report and save it, rename, or save it as another custom report.

Perform the following steps to modify a custom report:

1. Access the report using one of the following methods:
   - Select **Reports** in the navigation menu and click the tab for the type of report you want to run (Visitors, Contractors, Students, Staff, Volunteers, Emergency Mgmt or Security).
   - Select **Modules** in the navigation menu and select the module (Visitors, Contractors, Students, Staff, Volunteers or Emergency Mgmt) and then click the **Reports** tab in the module workspace.
2. If you want to only modify the report name and/or description, in the **Custom Reports** area, click **Edit/Delete**, modify the **Report Name** and/or **Description** and click **Save**. Click **Delete** to remove the custom report.
3. If you want to modify the report content, in the **Custom Reports** area, select the report you want to modify, change the dates if necessary, and click **Generate**.
4. Make your changes to the report, and then click **Save/Delete** and select one of the following options:
   - **Save** - This option will save the changes to the custom report with the same name.
   - **Save As** - This option allows you to save the modified custom report with a different custom report name.

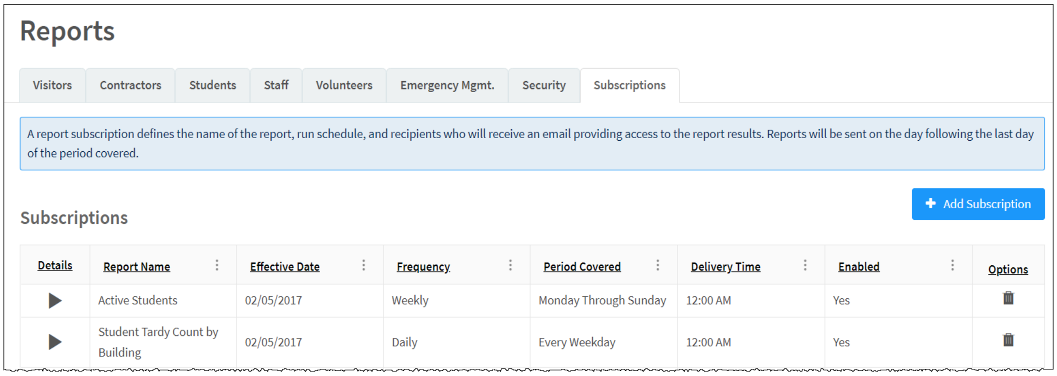
     Enter a new report name (required) and description, and click Save.
   - **Delete** - This option deletes the custom report.

     On the confirmation dialog, click **Yes** to continue with the deletion or **No** to cancel the action.

Manage Report Subscriptions

A report subscription defines the name of the report, run schedule, and recipients who will receive an email providing access to the report results.

Users with the *Can Manage Report Subscriptions* can use the **Subscriptions** tab on the **Reports** workspace to add, modify and delete subscriptions to reports.



Note:

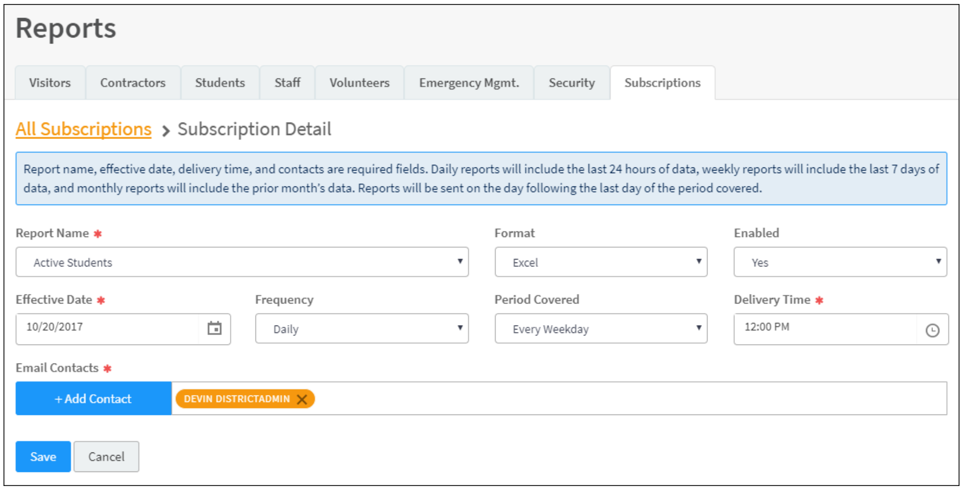
- Even with the *Can Manage Report Subscriptions* permission, the user must have been granted the appropriate *Can Manage <Module> Reports* permission to be able to create a subscription for the relevant reports. For example, if you want to create a subscription to a visitor report, you must also have the *Can Manage Visitor Reports* permission.
- Reports that do not provide for a start and end time, cannot be used in a report subscription. For example, **Active Volunteers** and **Who's in the Building**.

Add Subscription

Note:
Contacts must be defined before adding report subscriptions.

Perform the following steps to add a report subscription.

1. From the navigation pane, select **Reports** and then click the **Subscriptions** tab.
2. Select the specific building or All Buildings from the Building Selector.
3. Click **Add Subscription** to open the **Subscription Detail** workspace.



4. Complete the following fields:
   - **Report Name*** - Select the report to which you want to subscribe from the drop-down list. Custom reports will have [Custom] appended to the report name.
   - **Format** - Select the report output format (Excel or PDF) from the drop-down list.
   - **Enabled** - Select **Yes** or **No** to indicate whether this subscription is active. If you want to make the subscription inactive, change this setting to **No**.
   - **Effective Date*** - Click the icon and select the date the subscription begins.
   - **Frequency** - Select how often to run the report (Daily, Weekly or Monthly) from the drop-down list.
   - **Period Covered** - Select the days to be included in the report:
     - If **Daily** is selected as the frequency, choose to run **Every Weekday** (Monday through Friday) or **Every Day** (Monday through Sunday).
     - If **Weekly** is selected as the frequency, choose the date range during the week:
       - Monday Through Friday (Weekdays)
       - Monday Through Sunday
       - Tuesday Through Monday
       - Wednesday Through Tuesday
       - Thursday Through Wednesday
       - Friday Through Thursday
       - Saturday Through Friday
       - Sunday Through Saturday
     - If **Monthly** is selected, the frequency is **Prior Month**.

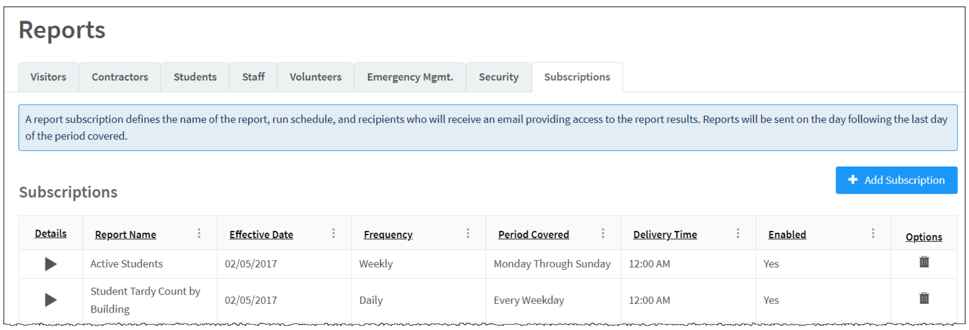
- **Delivery Time*** - Click the icon and select the time to run and deliver the report to the Email recipients.
- **Email Contacts*** - Click **Add Contacts** and select the names of the people who should receive the report.

5. Click **Save**. *The subscription was saved successfully* message displays.

View and Modify Subscriptions

You can view and modify report subscriptions from the **Subscriptions** tab.

1. From the navigation pane, select **Reports** and then click the **Subscriptions** tab.
2. View the subscriptions that have been added in the **Subscriptions** grid.



3. The name of the report, how often it runs, the day it runs, the time it is delivered and whether the subscription is enabled (active) display in the grid.
4. If you want to modify the subscription, click the icon to open the **Subscription Detail** workspace.
5. Modify any of the information and then click **Save**. *The subscription was saved successfully* message displays.

Delete Subscription

Perform the following steps to delete a subscription:

1. From the navigation pane, select **Reports** and then click the **Subscriptions** tab.
2. Locate the subscription in the **Subscriptions** grid and click the icon.
3. On the confirmation dialog, click **OK**.

Volunteer Reports

You can access **Volunteer** reports from the **Volunteers** workspace or the **Reports** workspace:

- To access from the **Volunteers** workspace, select **Modules > Volunteers** in the navigation menu and then click the **Reports** tab.
- To access from the **Reports** workspace, select **Reports** in the navigation menu and then click the **Volunteers** tab.

The following Volunteer reports are available:

- **Active Volunteers** – Volunteer profile information, including photo for all volunteers with an Active status; also shows whether the volunteer has a volunteer portal account.
- **All Volunteers By Status** – Volunteers grouped by status; also shows whether the volunteer has a volunteer portal account.
- **Approved Applications** – Volunteer applications that have been approved.
- **Denied Volunteer Applications** – Volunteer applications with a denied status.
- **Top Volunteers by Building** – Volunteers grouped by buildings and sorted by greatest total time; also shows whether the volunteer has a volunteer portal account.
- **Total Hours Per Volunteer** – Total number of volunteer hours associated to each volunteer.
- **Total Hours Per Volunteer By Building** – Total number of hours worked per volunteer grouped by building.
- **Total Volunteer Hours Worked Per Affiliation** – Total number of volunteer hours associated to each affiliation.
- **Total Volunteer Hours Worked Per Building** – Total number of volunteer hours associated to each building.
- **Total Volunteer Hours Worked Per Function** – Total number of volunteer hours associated to each function.
- **Total Volunteer Hours Worked Per Organization** – Total number of volunteer hours on behalf of an organization.
- **Volunteer Applications by Status and Building** – Volunteer applications modified within specified date range and grouped by status and building.
- **Volunteer Hours by Function and Building** – Volunteer hours grouped by function and building.
- **Volunteer Sign-In History by Building** – Volunteer sign in history grouped by building.

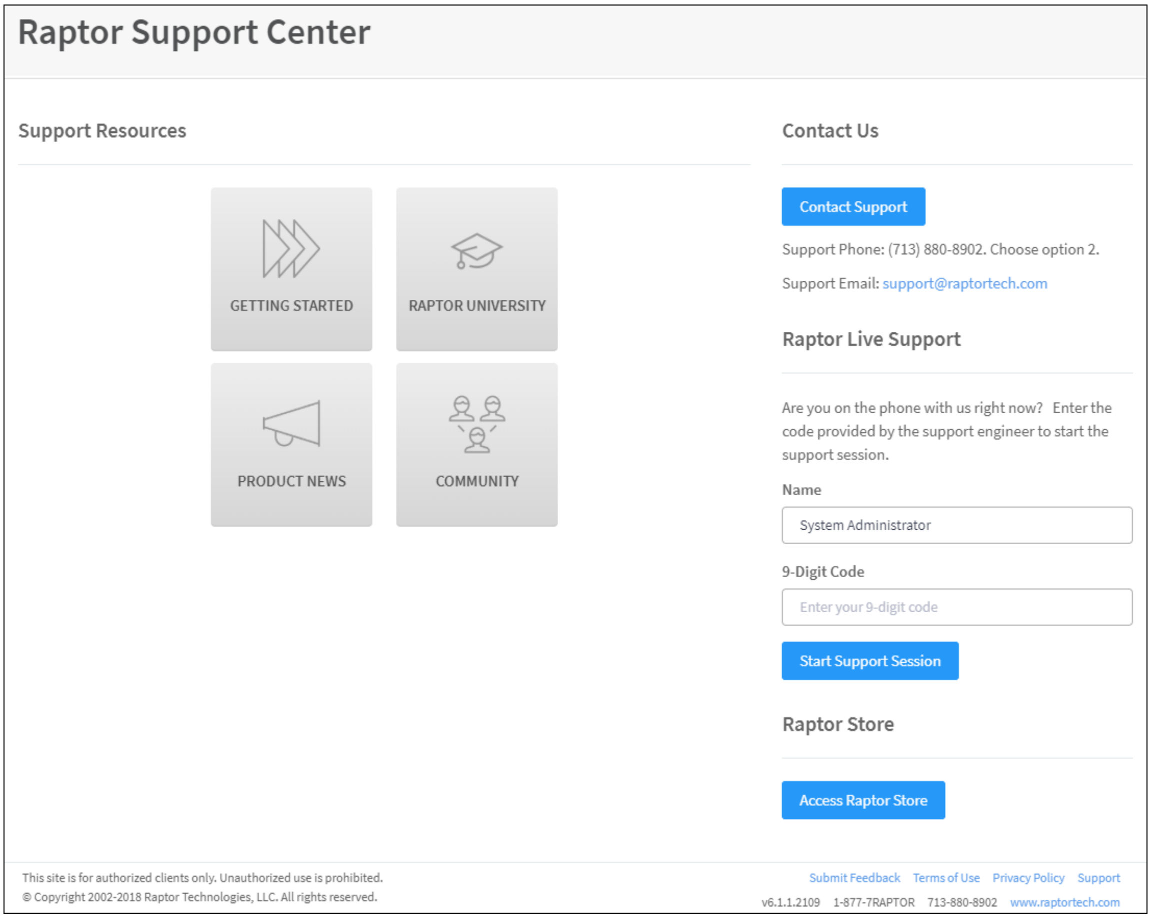
- **Volunteer Count and Hours Per Age Group** - Total count of volunteers and hours for youth, adult and senior age groups.

Note:

- When volunteer hours are reported but not associated to a building, the building will be listed as **Not Specified** in reports that group by building. This occurs when an event is created, and no building is associated to the event, and then the volunteer updates their hours for the event in the volunteer portal.
- Total Time is shown in the format of hours and minutes (HH:MM) and Total Hours is shown in the format of hours as a decimal number with two digits after the decimal point (HH.hh).

Raptor Support

The **Support** menu item launches the **Raptor Support Center** where you can find Self Help Resources for using Raptor.



Contact Us Via Email

To contact the Raptor Support team through email:

1. Click **Contact Support**.
2. Complete the information on the form and then click **Send**.

Access Raptor Store

Click **Access Raptor Store** for easy access to the Store for ordering additional equipment, replacement items and badges.

Self-Help Resources

Raptor Self Help Resources are available to enhance your understanding and use of the product:

- **Getting Started** – Supported Environments, Raptor Hardware Service Installation, and Raptor CLI Import Tool
- **Raptor University** – Documentation and Raptor University Training Courses
- **Product News** – Release Notes and Recorded Release Webinars
- **Community** – Submit your feedback and future user forum

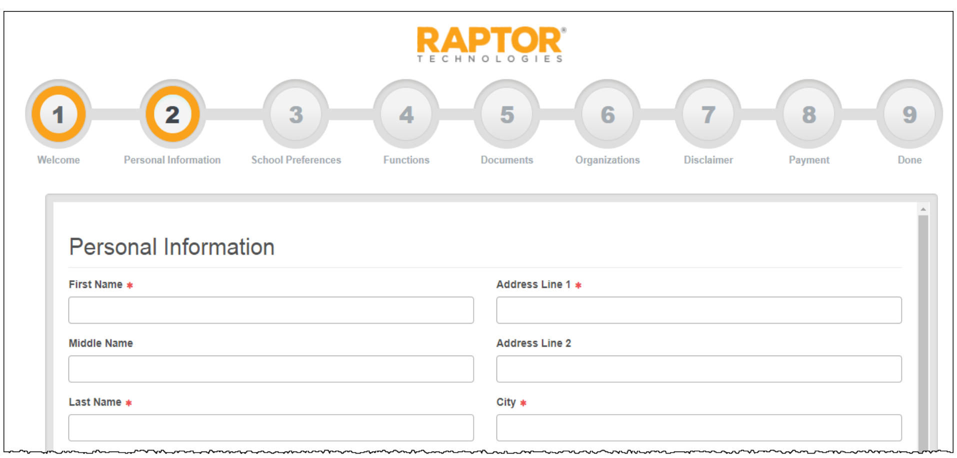
Online Volunteer Application

The Raptor online volunteer application is normally accessible from your district’s website or sent to you via email. Volunteer applicants must complete this application to be approved as a volunteer for school events and activities.

1. Click the link for the online volunteer application.

2. On the **Welcome** screen, review the introductory information and then click **Next** to continue. If you want to exit the application, click **Cancel Application**.
3. On the **Personal Information** screen, complete the following information on the screen:

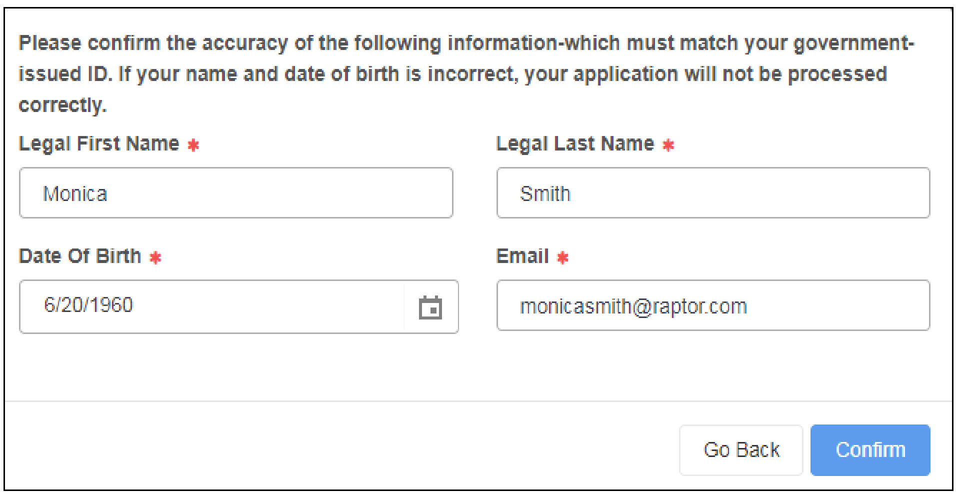
   The fields marked with an asterisk (*) are required.



- **First Name***
- **Middle Name**

- **Last Name***
- **Maiden Name**
- **Gender***
- **Date of Birth***
- **Affiliation***
- **Preferred Language***
- **Address***
- **City***
- **State***
- **Zip Code***
- **Phone Number***
- **Email***

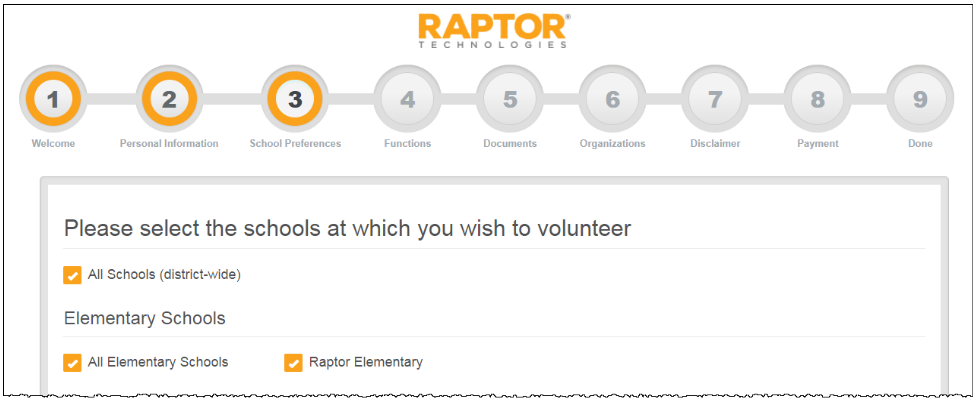
4. Click **Next**.



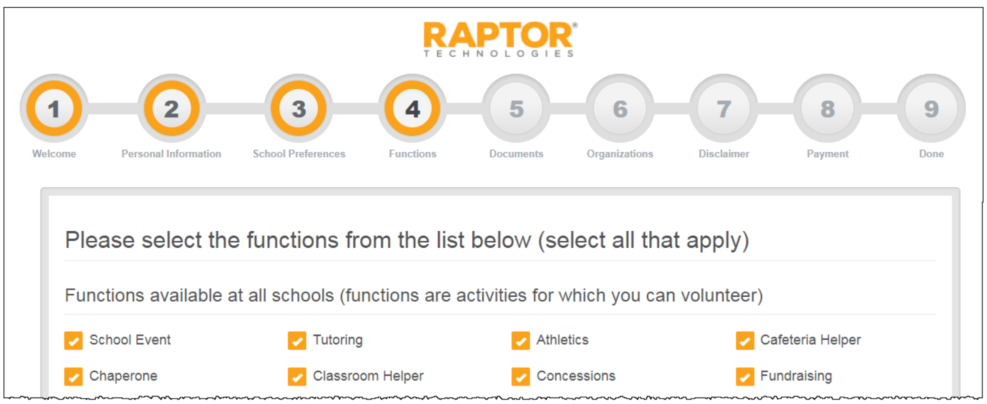
5. Review the information that is displayed on the confirmation dialog. If the information is correct, click **Confirm**. If corrections are necessary, correct the information in the dialog before proceeding.

> **Note:**
> If the applicant has previously applied and been denied, and they are marked as *Banned from reapplying*, a message displays indicating the application cannot be processed.

6. On the **School Preferences** screen, select the check boxes for the schools at which you would like to volunteer and then click **Next**.



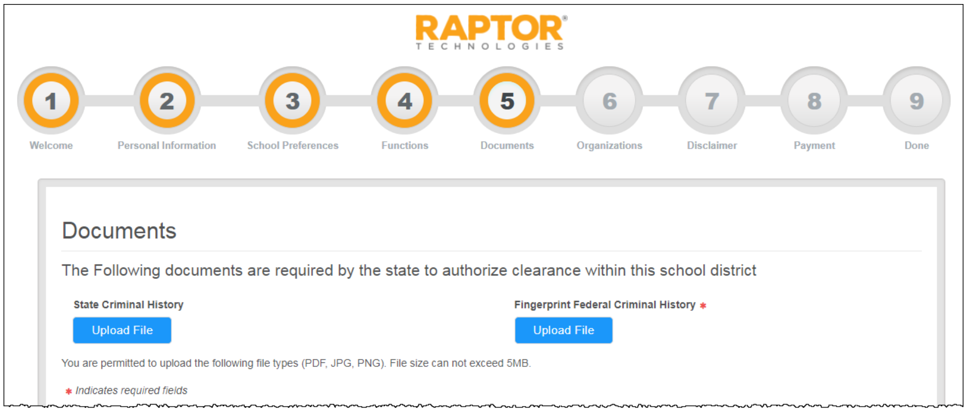
7. On the **Functions** screen, select the check boxes for the functions (activities) for which you would like to volunteer and then click **Next**.



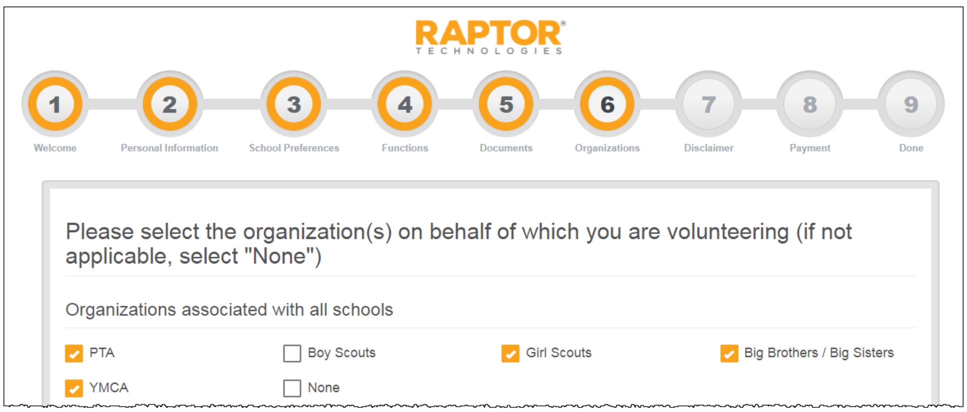
> **Note:**
> The buildings selected on the **School Preferences** screen determine the **Functions** that are listed.

8. On the **Documents** screen, upload the required documents and click **Next**.

> **Note:**
> If there are no required documents, this page is not displayed.

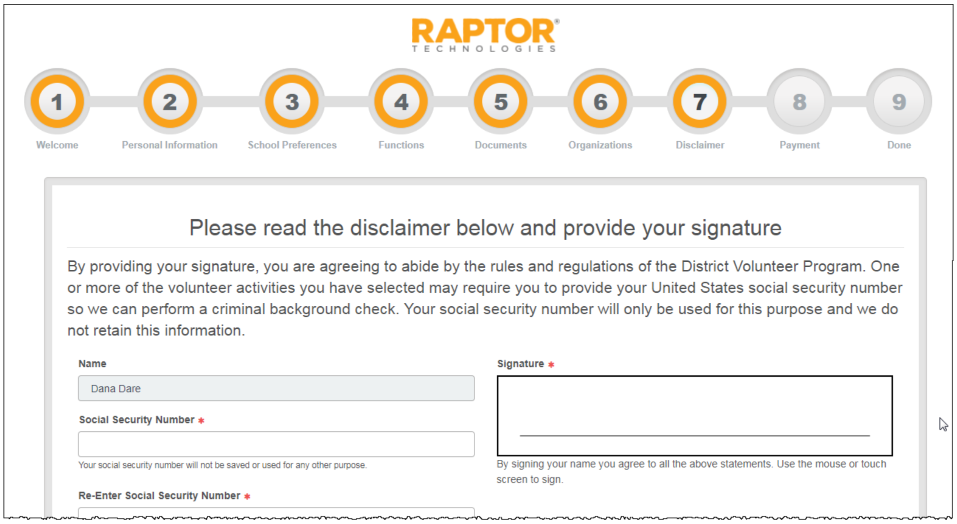


9. On the **Organizations** screen, select the check box for the organization to which you are associated and then click **Next**.



> **Note:**
> The buildings selected on the **School Preferences** screen determine the **Organizations** that are listed. If there are no organizations defined for the selected building, the Organization page is not displayed.

10. Read the **Application Disclaimer** and then click in the **Signature** box and use the mouse or touch screen to sign your name.

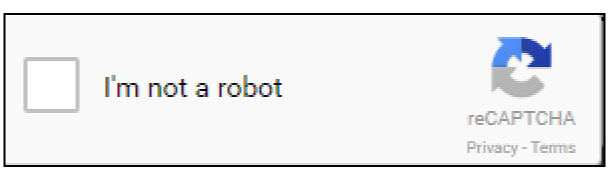


11. If the *Criminal Background Check* feature is enabled and the applicant selected a function that requires a background check, the applicant's **Social Security Number** will be required on the **Disclaimer** page.
12. Enter your social security number and then re-enter it to confirm the number.

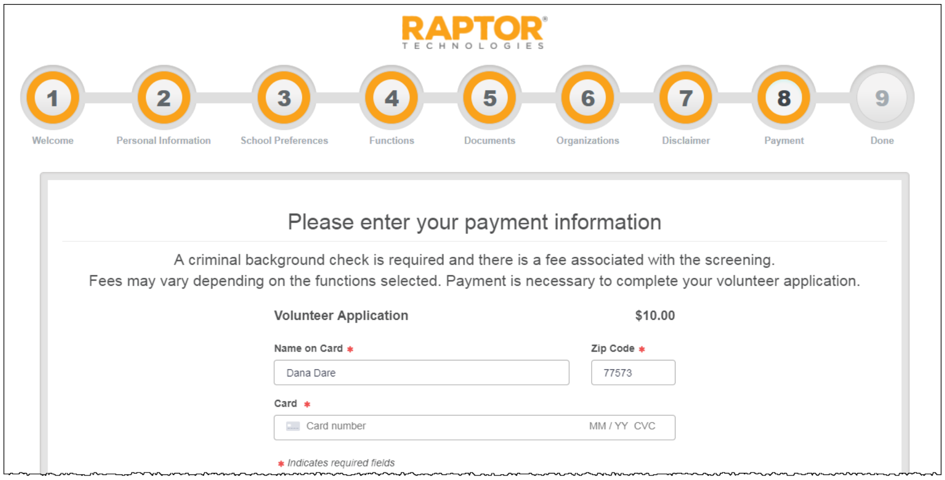
Note:

- If the *Criminal Background Check* feature is not enabled, the **Social Security Number** field will not display on this page.
- If the WATCH background check is used, the social security field will not display.
- If applicant is under age 18, the social security field will not display.

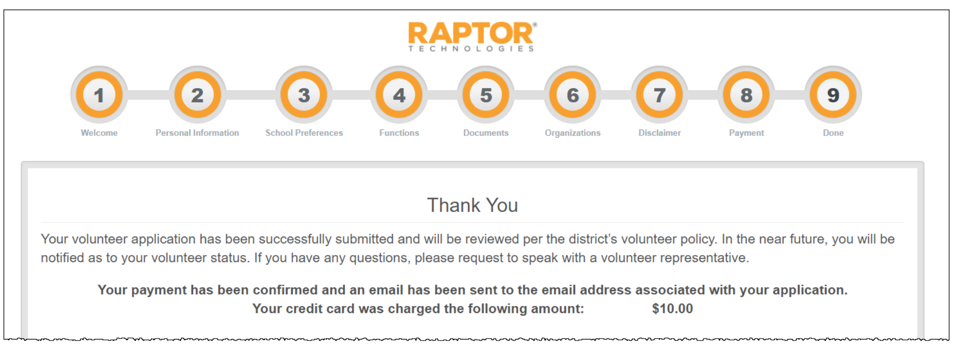
13. Select the check box on the CAPTCHA dialog to continue.



If you have selected one or more functions that require a background check that has an associated cost that will be paid by the applicant, the **Payment** screen will display where you can provide payment information.



14. Enter the credit card information and click **Next**.
15. On the **Done** screen, click **Finish**.



The applicant will receive an email notifying them that their application has been received and is being processed. Upon approval, they will be sent an email notifying them that their application has been approved.

If the district has enabled the Volunteer Portal, a link to access the portal will be included in the approval email.

Using the Volunteer Portal

The Volunteer Portal provides an easy-to-use portal for your volunteers to manage their volunteer activities.

Upon approval as a volunteer and creation of your volunteer portal user account, you will be sent an email informing you that you have been approved. If the Volunteer Portal is enabled, the instructions to access the portal will be included in the email.

This section includes the following topics:

- Volunteer Portal Log In and Log Out
- Manage Volunteer Profile
- Change Password
- Manage Hours
- Manage Events
- Email Volunteer Community
- Manage Preferences

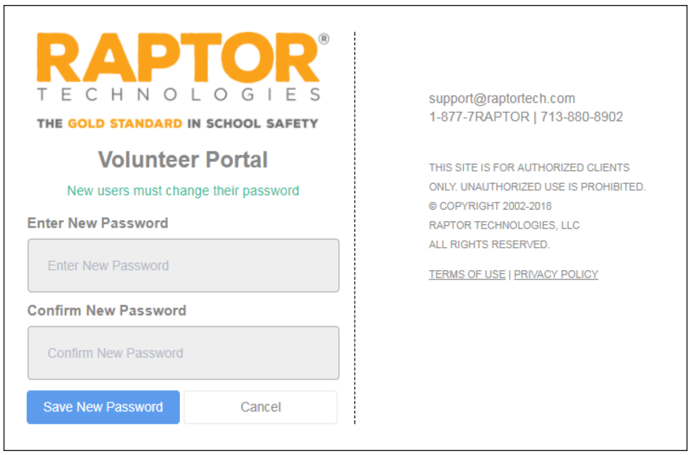
Volunteer Portal Log In and Log Out

Use the information in this section to log in for the first time to the volunteer portal, change your password, reset your password if necessary, and to log out of the portal.

Change Password

The first time you log in to the Volunteer Portal, you must change your password. Perform the following steps to change your password.

1. Click the link in the email that was sent to you.

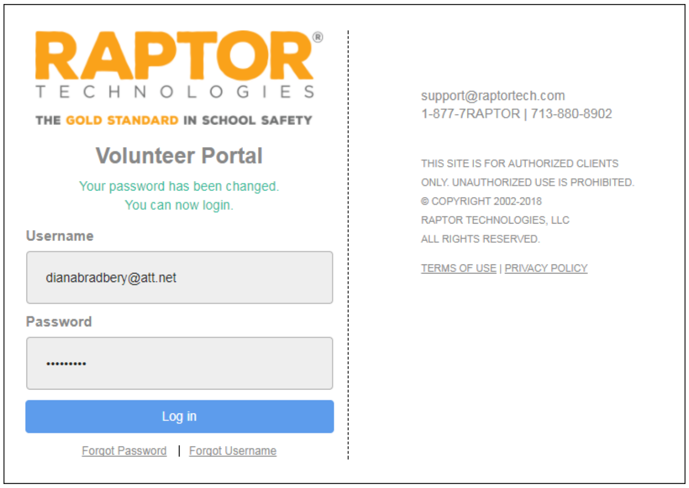


2. Enter a **New Password** and **Confirm New Password**, and then click **Save New Password**.

Log In

After you have changed your initial password, perform the following steps to log in:

1. On the **Volunteer Portal Log In** screen, enter your **Username** (email address) and **Password**.

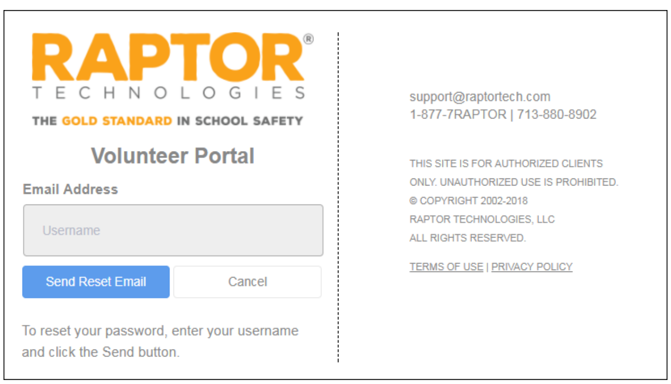


2. Click **Log In**.

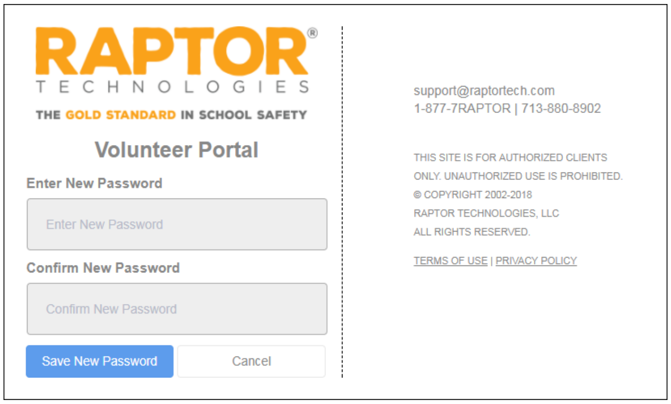
Request Forgotten Password

If you have forgotten your password, you can reset your password using the following procedure:

1. On the **Volunteer Portal Log In** screen, select the **Forgot Password** link.



2. Enter your **Username** and then click **Send Reset Email**.
3. Open the email that was sent to you and click the **Please click here** link to confirm your request and reset your password.
4. On the **Password Reset** screen, enter a **New Password** and then re-enter to confirm it.



5. Click **Save New Password**.

   The **Volunteer Portal Log In** screen displays with a message indicating your password has been changed. You can now log in to the Volunteer Portal with your new password.

Request Forgotten Username

If you have forgotten your user name, select the **Forgot Username** link on the **Volunteer Portal Log In** screen. A message displays informing you that your user name is your email address.

Log Out

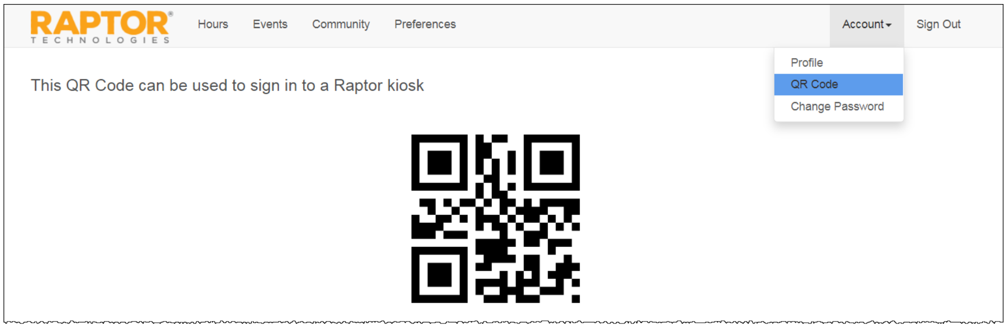
To log out of the Volunteer Portal, select **Sign Out** in the upper right corner of the portal.

Access QR Code for Kiosk Login

If the **Assigned ID** field in the volunteer user account has an entry, the volunteer has a QR Code available to them from their Volunteer Portal. Using their mobile device, if the volunteer logs into their Volunteer Portal, they can sign in via the Kiosk by waving the code under the Symbol 1D/2D scanner.

Perform the following steps to access the QR Code in the Volunteer Portal:

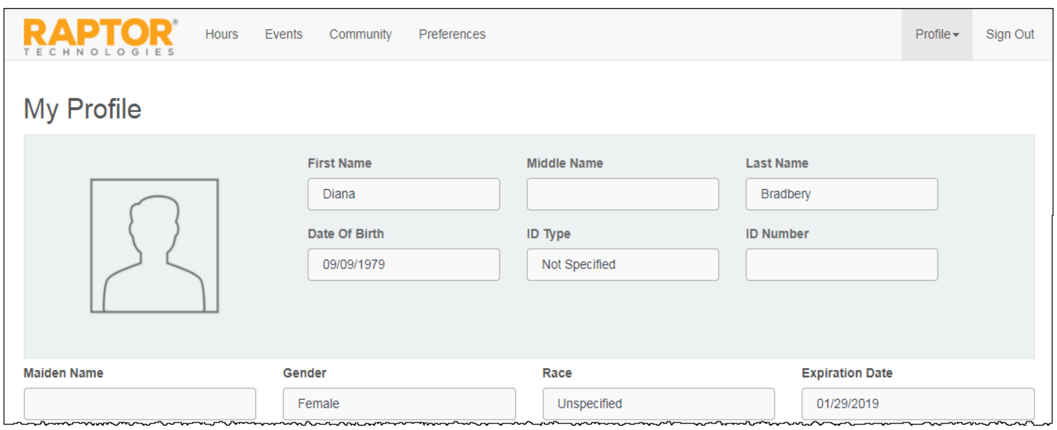
1. Log into the Volunteer Portal from your mobile device.
2. Click **Account** in the upper right corner of the Volunteer Portal and select **QR Code** from the drop-down menu.



You can now sign in via the Kiosk by waving your mobile device with the QR code under the Symbol 1D/2D scanner.

Manage Volunteer Profile

When the Volunteer Portal opens, the **My Profile** workspace is displayed. Volunteers can view and edit their profile from this workspace.



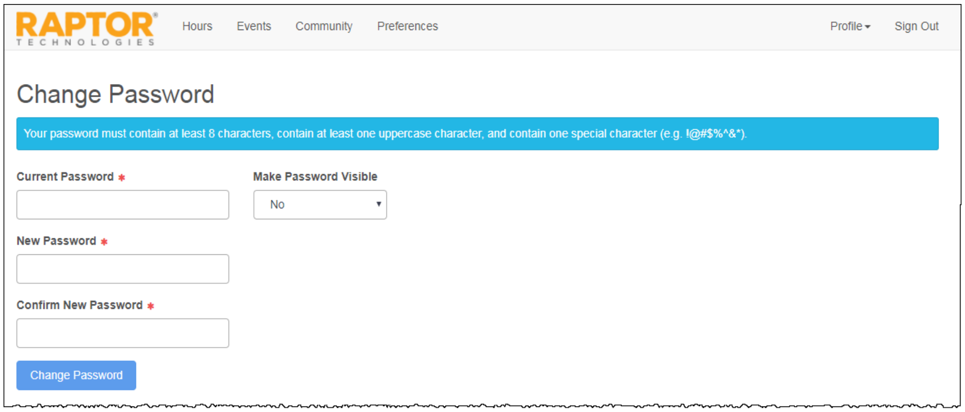
The information in the upper portion of the screen is *read-only* and cannot be changed. Volunteers can update their address information, phone number and language preference.

Click **Save** after making any changes.

Change Password

Volunteers can change their password at any time from the My Profile workspace. Perform the following steps to change your password:

1. On the **My Profile** workspace, click the **Profile** tab and select **Change Password** from the drop-down menu.

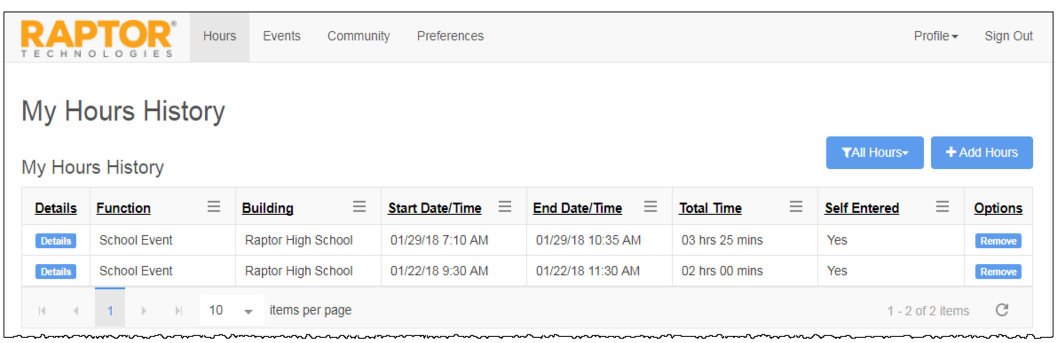


2. Enter your **Current Password** in the text box.
3. If you want the password to be visible on this screen, select **Yes** from the **Make Password Visible** drop-down list.
4. Enter a **New Password** in the text box and re-enter it in the **Confirm New Password** text box.
5. Click **Change Password**.

   A message displays indicating your password was successfully changed.

Manage Hours

Use the **Hours** tab on the Volunteer Portal to view a history of the hours you have volunteered. Volunteers can view all the functions and total time volunteered from the **My Hours History** workspace.



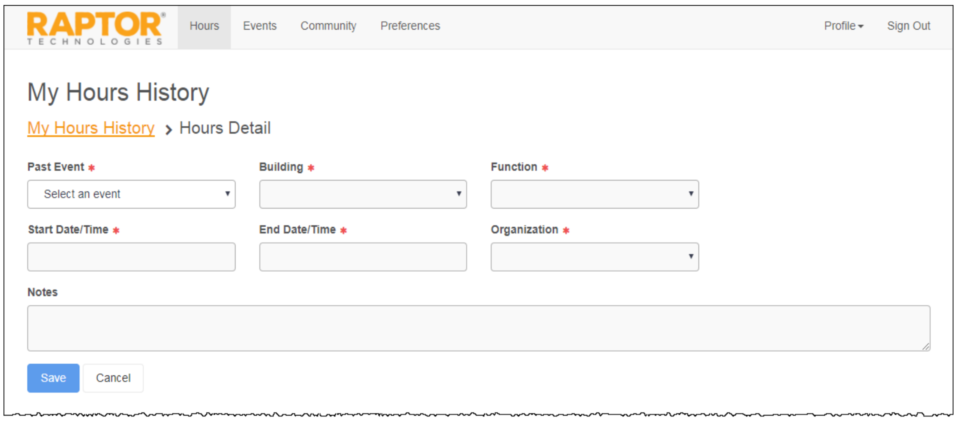
The functions, building, start date and time, end date and time, total time and log method displays.

You can filter the hours to be displayed using the **Filter** drop-down menu. Hours can be filtered by **Current Period** (since last Reset) and **All Hours**. If hours have been reset, the date of the last reset displays following the **My Hours History** label.

Click **Details** next to the function to view the hour details.

Add Hours

When the *Allow Volunteers to Add Hours* setting is enabled, volunteers can add the hours that they volunteered in the Volunteer Portal. Perform the following steps to add hours:



1. On the Volunteer Portal, click the **Hours** tab.
2. On the **My Hours History** workspace, click **Add Hours** and then specify the following information:
   - **Past Event*** - Select the event where you volunteered from the drop-down list. If the event is not listed, select **Event Not Listed Here**
   - .**Function*** - Select the function you performed during the event from the drop-down list.
   - **Location*** - Select the building where you volunteered for this event. If the building is not listed, select **Location Not Listed**.
   - **Start Date/Time*** - Select the date and time you began volunteering.
   - **End Date/Time*** - Select the date and time you stopped volunteering.
   - **Organization*** - If you specified an organization in your volunteer profile, select the organization from the drop-down list. You can also select **None**.
   - **Notes** - Optionally, enter notes about the event.
3. Click **Save**.

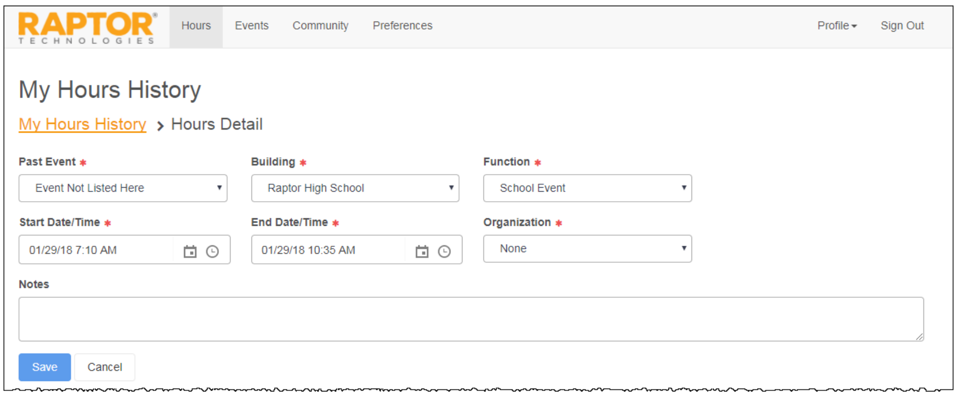
Modify Hours

Users with the *Can Edit Volunteer Hours* permission can edit the volunteer hours that they added to the volunteer portal.

> **Note:**
> The *Allow Volunteers to Add Hours* setting must be set to **Yes** to be able to use this feature.

Perform the following steps to modify your hours:

1. Click **Details** next to the function.



2. Modify the **End Date/Time** and click **Save**.

Delete Hours

When the *Allow Volunteers to Add Hours* setting is enabled, volunteers can delete the hours that they volunteered in the Volunteer Portal.

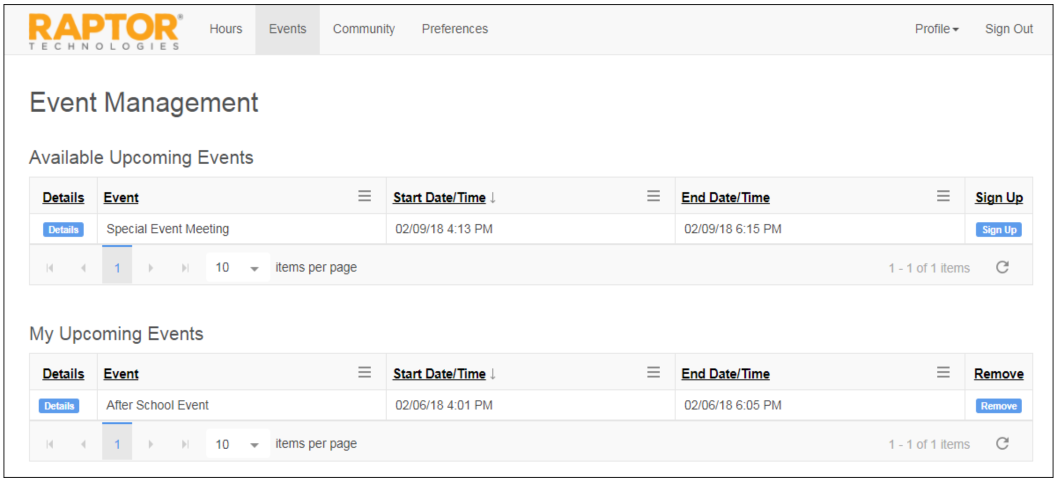
> **Note:**
> A volunteer can modify or delete those hours they added; not hours related to a sign in.

Perform the following steps to delete hours:

1. On the Volunteer Portal, click the **Hours** tab.
2. In the **My Hours History** grid, locate the entry you want to delete, and click **Remove**.
3. On the confirmation dialog, click **Yes** to remove the hours entry.

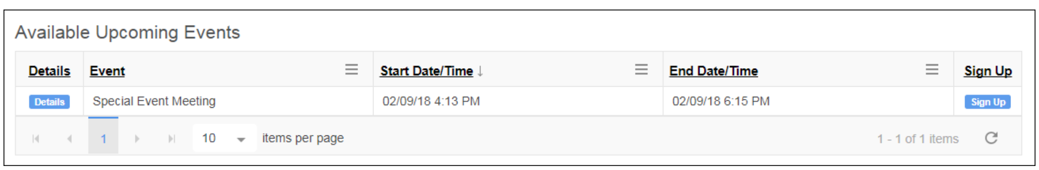
Manage Events

Use the **Events** tab on the Volunteer Portal to manage the events for which you are volunteering.



View Available Upcoming Events

Volunteers can view all upcoming events for which they can volunteer in the **Available Upcoming Events** grid on the **Event Management** workspace.

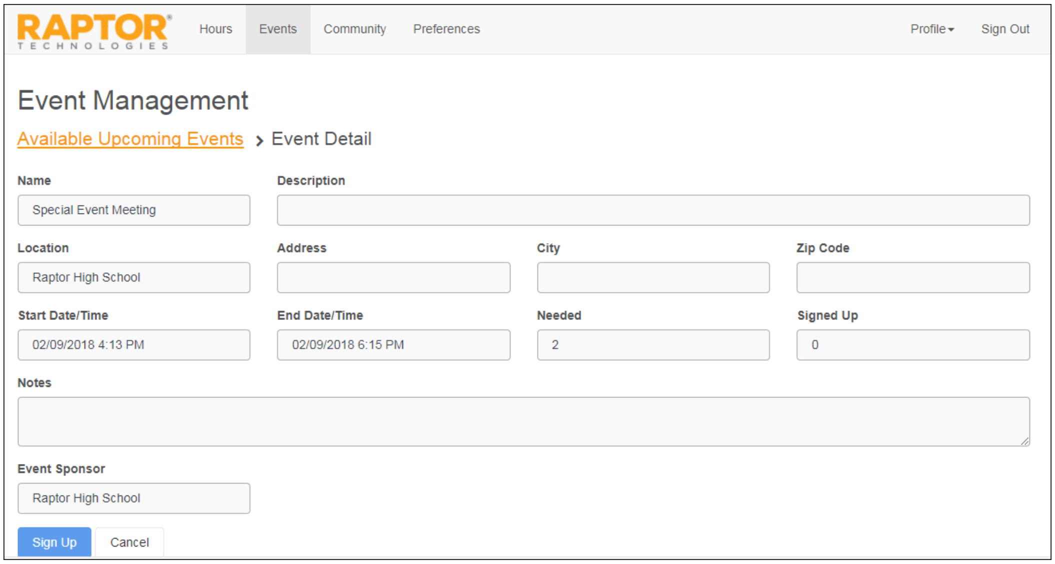


Once the event's **Start Date/Time** is reached, it will no longer display in the **Available Upcoming Events** data grid.

If you can no longer volunteer for the event, click **Remove**.

View Event Details

In the **Available Upcoming Events** grid on the **Event Management** workspace, click **Details** for the event you want to view.



If you want to volunteer for this event, click **Sign Up**.

Sign Up for Events

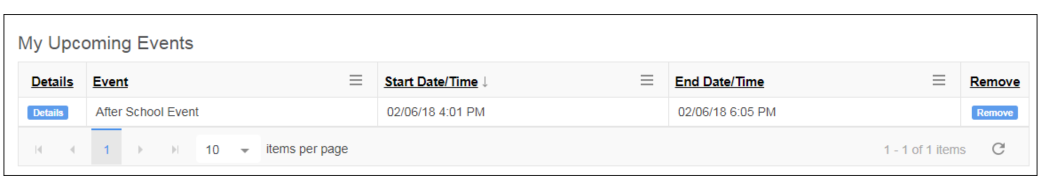
You can sign up for events from the **Available Upcoming Events** grid on the **Event Management** workspace or from the **Event Details** workspace.

- To sign up for an event from the **Available Upcoming Events** grid, click **Sign Up** in the row for the event.
- To sign up for an event from the **Event Details** workspace, click **Details** to open the **Event Details** and then click **Sign Up**.

Once you sign up for an event, that event is moved to the **My Upcoming Events** data grid.

View Your Upcoming Events

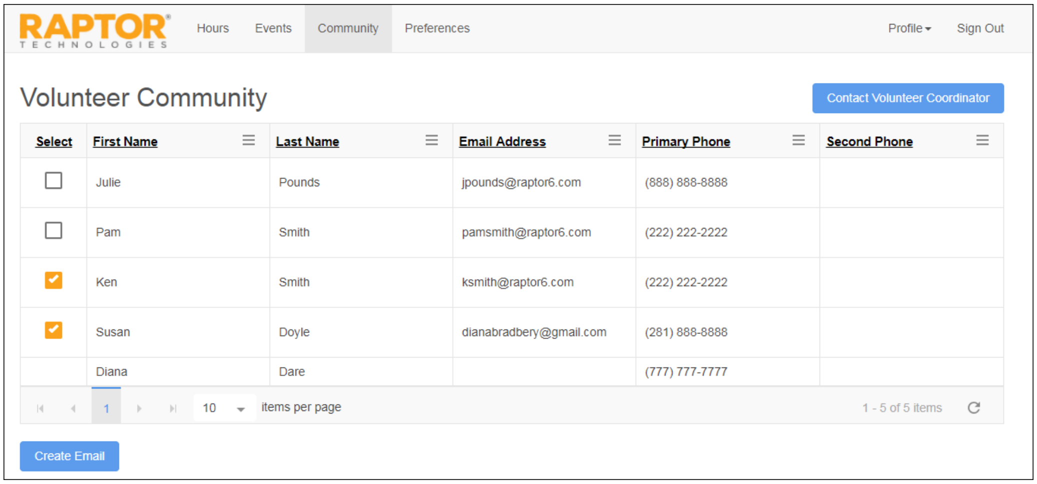
Use the **My Upcoming Events** grid on the **Event Management** workspace to view the events that you have already signed up to volunteer.



If you can no longer volunteer for the event, click **Remove**.

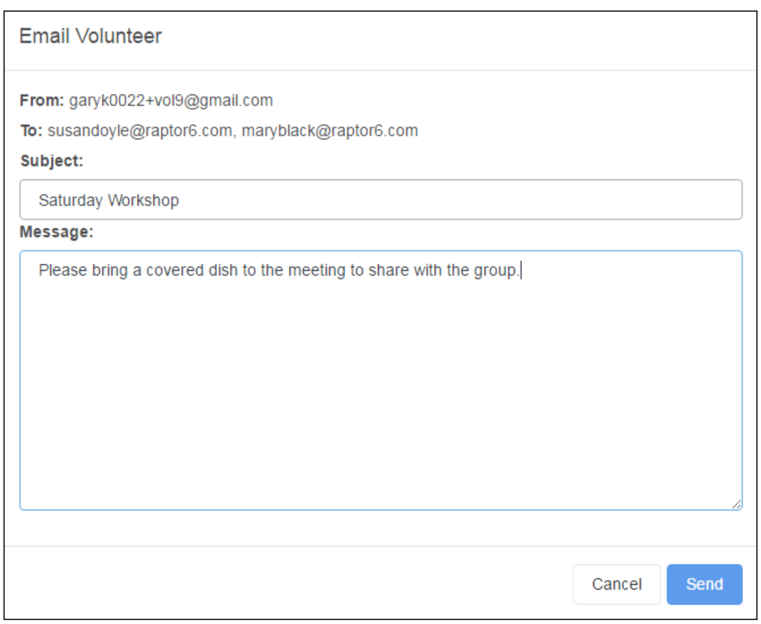
Email Volunteer Community

Use the **Community** tab on the Volunteer Portal to view a list of volunteers that have allowed other volunteers to view their information, and to send an email to the volunteers.



Perform the following steps to send an email to volunteers:

1. On the **Volunteer Community** workspace, select the check box next to the names of the volunteers to receive the email.
2. Click **Create Email**.

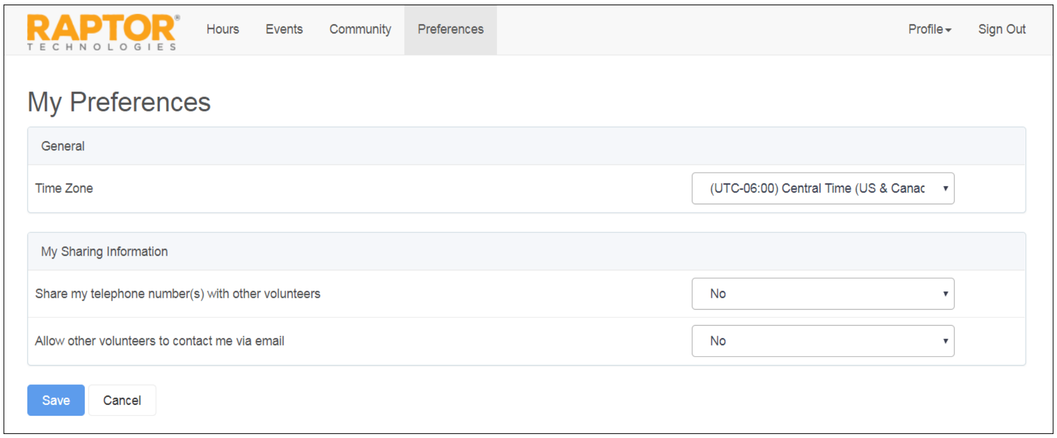


3. Enter the email **Subject** and **Message**, and then click **Send**.

   An *Email Successfully Sent* message is displayed.

Manage Preferences

Use the **Preferences** tab on the Volunteer Portal to indicate your sharing information preferences.



On the **My Preferences** workspace, specify the following information and then click Save:

- **Time Zone** - Select the time zone for the region where the school is located.
- **Share my telephone number(s) with other volunteers** - Select **Yes** or **No** from the drop-down list to indicate whether you want your phone number shared with other volunteers.
- **Allow other volunteers to contact me via email** - Select **Yes** or **No** from the drop-down list to indicate whether you want your email address shared with other volunteers.

> **Note:**
> If you select **No** to both settings, your information will not display on the **Community** page for other volunteers to see.

Understanding User Accounts

Raptor System User Accounts

Raptor users have a unique set of permissions assigned to them based on the type of user account (role) that they have been assigned. The permissions assigned to the account determine what they can see and do in Raptor.

The following types of user accounts can be created in Raptor.

District Admin

The District Admin role has the highest level of permissions and is frequently assigned to district administrators. This role has full access to all schools or buildings within the district.

Building Admin

The Building Admin role is assigned to users who perform administrative functions at the school level. This type of user account is typically assigned to school secretaries, principals and assistant principals. Building Admins can be associated with more than one building.

Student Admin

The Student Admin role is assigned to users who perform student-related tasks, such as signing in and signing out students, monitoring tardy count, resetting tardy and temporary ID count, running student reports, importing students and their associated guardians, and adding, modifying and deleting students and guardians. Student Admins can be associated with more than one building.

> **Note:**
> The Student Module must be enabled to be able to create Student Admin accounts.

Entry Admin

The Entry Admin role is assigned to users who are responsible for signing in and signing out visitors, students, volunteers, staff and contractors who enter and leave the building. This role is typically assigned to front-desk personnel. Entry Admins can be associated with more than one building.

District Volunteer Coordinator

The District Volunteer Coordinator role is assigned to users who manage volunteers and events and are automatically assigned to all schools and buildings within the district. Users with this role can sign in and sign out volunteers, search volunteers and run volunteer reports. Typically, a volunteer coordinator is also responsible for adding volunteers, approving volunteers, and coordinating volunteer events.

> **Note:**
> The Volunteer Module must be enabled to create District Volunteer Coordinator accounts.

Building Volunteer Coordinator

The Building Volunteer Coordinator role is assigned to users who manage volunteers and events at the school level. Users with this role can sign in and sign out volunteers, run volunteer reports, and approve volunteers for only the schools to which they are assigned.

> **Note:**
> The Volunteer Module must be enabled to create Building Volunteer Coordinator accounts.

Security Officer

The Security Officer role is assigned to District or School Resource Officers and is automatically assigned to all schools or buildings within the district. Users with this role can manage alerts and run offender reports.

District Reunification Admin REU

The District Reunification Admin role is assigned to users who manage reunification at the client level. This user can initiate and end incidents, manage reunification settings, import rosters and run reunification reports for all buildings in their district.

Building Reunification Admin REU

The Building Reunification Admin role is assigned to users who manage reunification at the building level. This user can initiate and end incidents, manage reunification settings, import rosters and run reunification reports for their specific buildings.

Reunification User REU

The Reunification role is assigned to users who will be granted the Reunification Mobile App permissions.

Raptor Reunification Mobile App User Accounts

Raptor Reunification user accounts (roles) provide access to functionality within the Reunification mobile application.

Incident Commander REU

The Incident Commander role is assigned to users who are responsible for managing and overseeing a drill or live emergency. This role provides elevated access to live incident dashboards and secure documents.

Student Supervisor REU

The Student Supervisor role is assigned to users who are responsible for supervising and accounting for students during a drill or live emergency.

Understanding Permissions

Each user is assigned a role that has specific permissions associated with it, and the permissions can be enabled or disabled. Typically, permissions are selected when the user account is created.

When creating a user account, the user can only grant permissions that their account includes. For example, if you are a District Admin and do not have the *Can Manage Logs* permission, you cannot create user accounts and grant the *Can Manage Logs* permission.

Refer to the following tables to understand the permissions that are available for each role.

Administration Permissions

Permission	Description	Role
Can View Logs	Provides access to the **Log** menu item under the **Admin** menu.	District Admin Building Admin District Reunification Admin Building Reunification Admin
Can Manage Client Settings	Provides access to **Client Profile**, **Buildings**, and **Module Settings** under the **Admin** menu. With this permission, a user can define drill schedules, update drill requirements and access the drill compliance dashboard.	District Admin
Can Manage Building Settings	Provides access to the **Building Profile** and **Module Settings** and under the **Admin** menu. With this permission, a user can update drill requirements and access a building's drill schedule.	Building Admin
Can Manage Users	Provides access to the **Users/Contacts** menu item under the Admin menu. With this permission, a user can view, create, modify, active and deactivate Raptor user accounts, and reset the password for the account.	District Admin Building Admin District Volunteer Coordinator Building Volunteer Coordinator District Reunification Admin Building Reunification Admin

Permission	Description	Role
	The role of the user creating the user accounts restricts the type of user account role they can create: ▪ District Admin - can create any user account ▪ Building Admin - can create only Building Admin, Student Admin and Entry Admin user accounts ▪ District Volunteer Coordinator - can create other District Volunteer Coordinators, Building Volunteer Coordinators and Volunteers. In addition, the user creating the user accounts can only assign the buildings their own account is associated with to the new user accounts.	
Can Manage Alerts	Provides access to the **Alert Settings** menu item under the **Admin** menu. With this permission, a user can view and modify notification templates associated with sex offender alerts, custom alerts, the Emergency button, and instant alerts. They can also view, create, and modify custom and instant alerts, and import custom alerts.	District Admin Building Admin Security Officer District Reunification Admin Building Reunification Admin
Can Manage Kiosks	Provides access to the **Kiosk Settings** menu item under the **Admin** menu. With this permission, a user can view, create, modify per module kiosk settings, modify client kiosk policy, and launch Kiosk Profiles.	District Admin Building Admin
Can Launch Kiosks	Provides the ability to launch a kiosk.	District Admin Building Admin Entry Admin

Permission	Description	Role
Can Perform Maintenance	Provides access to the **Maintenance** menu item under the **Admin** menu. With this permission, a user can merge duplicate records and perform other maintenance tasks.	District Admin District Reunification Admin
Can Manage Documents	Provides access to the **Documents** area on the **General Settings** workspace under **Admi**n. With this permission, a user can add, modify or delete documents used for reunification. This feature is not yet available in the product.	District Admin Building Admin District Reunification Admin
Can Run System Reports	Provides access to the Raptor Link Dashboard and future system reports.	District Admin Building Admin District Reunification Admin Building Reunification Admin
Can Manage Report Subscriptions	Provides access to the **Subscriptions** tab on the **Reports** workspace. With this permission, you can add, modify and delete report subscriptions.	District Admin Building Admin Student Admin Entry Admin District Volunteer Coordinator Building Volunteer Coordinator Security Officer

Volunteer Permissions

Permission	Description	Role
Can Sign In Volunteers	User can sign in volunteers and access the Delayed Entry and Batch Printing features.	District Admin Building Admin Entry Admin District Volunteer Coordinator Building Volunteer Coordinator
Can Sign Out Volunteers	User can view volunteers and sign out volunteers (single or multiple sign out).	District Admin Building Admin Entry Admin District Volunteer Coordinator Building Volunteer Coordinator
Can Run Volunteer Reports	User can view, create, manipulate and export reports related to volunteers; can access the Volunteer Dashboard.	District Admin Building Admin Entry Admin District Volunteer Coordinator Building Volunteer Coordinator
Can Manage Volunteers	User can search volunteers, add volunteers, and delete volunteer details.	District Admin Building Admin District Volunteer Coordinator Building Volunteer Coordinator
Can Manage Volunteer Settings	User can change **Volunteer Management** settings and manage functions, requirements, required documents, organizations, affiliations, and custom fields; change **Sign-In/Out** settings; change **Volunteer Application** settings and manage notifications, and online application page content; change **Volunteer Portal** settings and manage notifications; and change **Event Management** settings.	District Admin Building Admin District Volunteer Coordinator Building Volunteer Coordinator

Permission	Description	Role
Can Import Volunteers	User can import approved volunteers and volunteer applications. **Note:** This permission requires that the user also have the *Can Manage Volunteers* permission.	District Admin Building Admin District Volunteer Coordinator Building Volunteer Coordinator
Can Manage Events	User can view, create, update, and delete events, sign up volunteers or remove volunteers from events, and email volunteers.	District Admin Building Admin District Volunteer Coordinator Building Volunteer Coordinator
Can Approve Volunteers	User can view and approve volunteer applicants.	District Admin Building Admin District Volunteer Coordinator Building Volunteer Coordinator
Can View Events	User (volunteer) can view upcoming events and the events for which they have signed up.	Volunteer
Can Sign Up Events	User (volunteer) can sign up for events.	Volunteer
Can Edit Volunteer Hours	User (volunteer) can edit the hours they entered in the Volunteer Portal.	Volunteer
Can Access Volunteer Portal	User (volunteer) can log in to the Volunteer Portal.	Volunteer

Using Manifest Import

The Import Manifest feature enables you to schedule imports on a daily, weekly or monthly basis (whatever fits your needs) using the Windows Task Scheduler.

Download Import Scheduler Files

You will need to download the **Raptor.Import.Scheduler.exe** (executable) and the **Raptor.Import.Scheduler.exe.conf** files from the Raptor Support page. These files are downloadable as a **.zip** file that you can save anywhere on your computer and then unzip the files.

1. From the navigation menu, select **Support**.
2. Click **Getting Started** and scroll to the bottom of the page.
3. Click **Get Raptor CLI Import Tool**.
4. Click **Save File**.

Create Manifest File

Before you can schedule an automatic import, you must first create the manifest file that contains all the mapping information for the type of import you are performing:

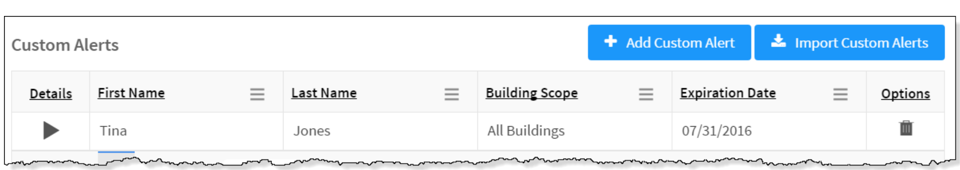
- Import Approved Volunteers
- Import Volunteer Applications

Perform the following steps to create the manifest file:

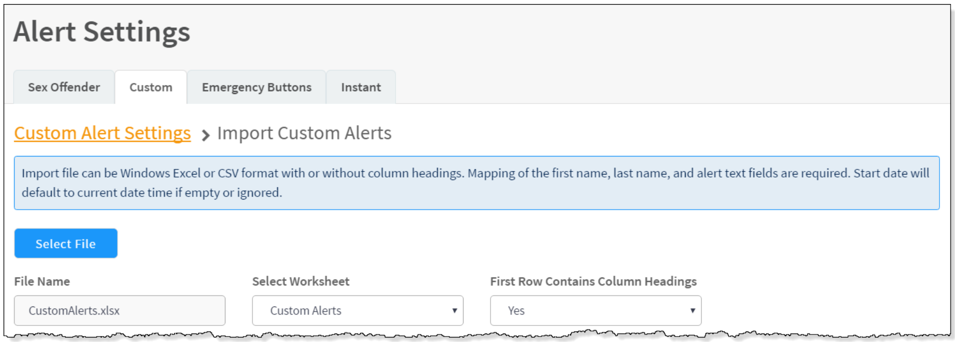
> **Note:**
> The following steps use **[Import Custom Alerts]** as an example only. Replace the information in brackets with the relevant import feature.

Perform the following steps to import custom alerts.

1. In the navigation menu, select **Admin > Alert Settings**.
2. Click the **Custom** tab.
3. In the **Custom Alerts** grid, click **Import Custom Alerts**.



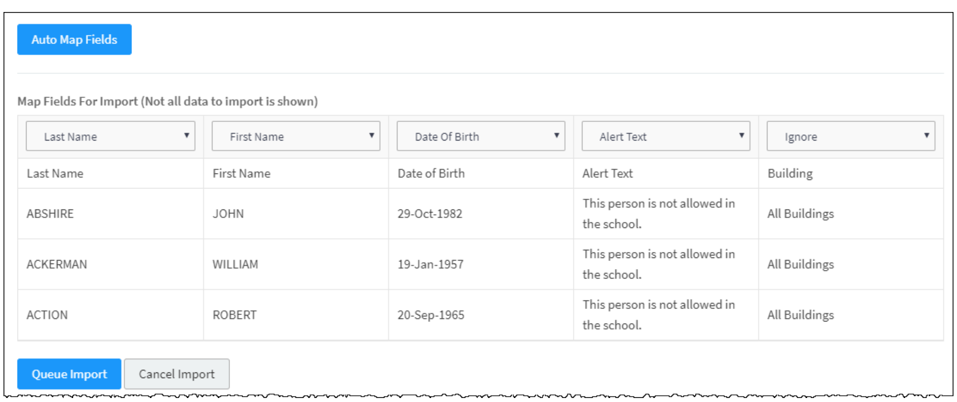
4. On the **Import Custom Alerts** workspace, click **Select File** and navigate to the location where the file is saved on your computer.



5. Select the Excel or CSV file and click **Open**.
6. If you used Excel and the file contains multiple worksheets, select the worksheet that contains the custom alert information from the **Select Worksheet** drop-down list.
7. If the first row of the worksheet contains column headings, select **Yes** from the **First Row Contains Column Headings** drop-down list. Otherwise, select **No**.
8. Click **Auto Map Fields** to automatically map the column headings in the file to the mapping names in Raptor. The names must be identical.

> **Note:**
> First Name, Last Name, and Alert Text are required columns. The columns with Ignore selected with not be imported.

You can also manually map each of the columns to be imported by selecting the appropriate fields in the drop-down menu above each column that displays.



9. Click **Save Manifest** and save the file. You can then schedule the imports using the Windows Task Scheduler.

Importing Manifest from Command Prompt

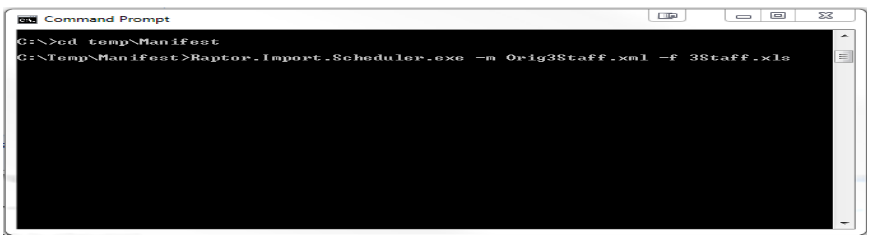
You can now import the manifest from a Microsoft Windows Command Prompt or configure it to run using the Windows Task Scheduler.

1. Open a Windows command prompt and change to the directory where the manifest file is saved.
2. Enter the command using the following syntax:

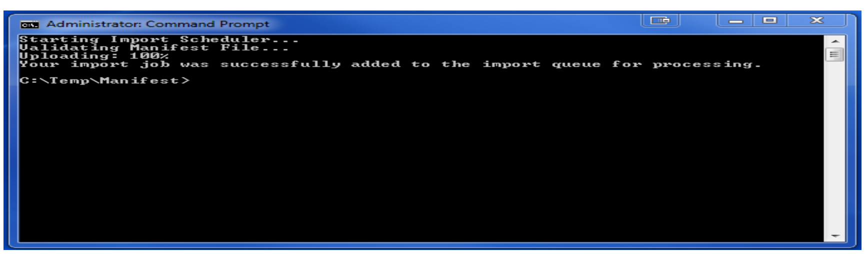
   ```
   <manifest import executable> -m <name of manifest file> -f
   <name of import file>
   ```

   For example:

   ```
   Raptor.Import.Scheduler.exe -m customalerts_import.xml -f
   customalerts_import.xls
   ```

3. Press **Enter**.

   The **.exe** file reads and validates the manifest file and then reads and uploads the **.xls** file. If the import is successful, the same message that displays in Raptor displays in the command prompt, *"Your import job was successfully added to the import queue for processing."*

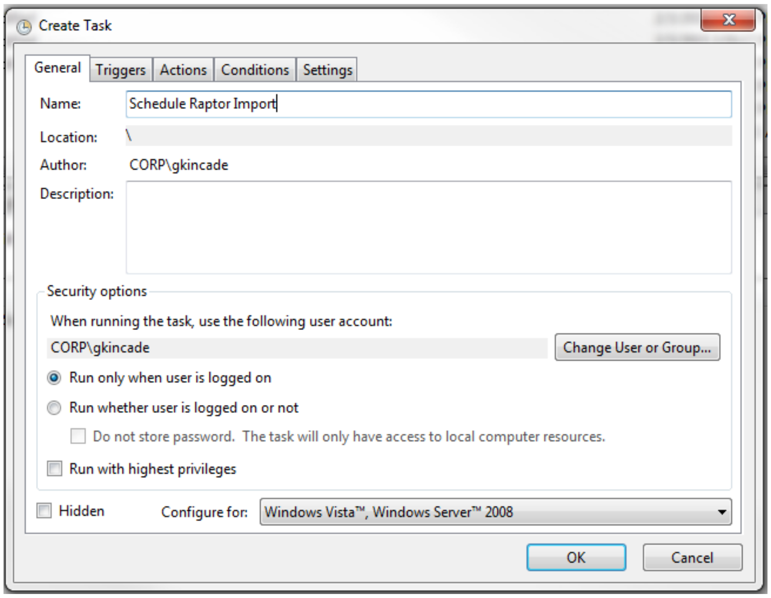
   The import is queued and when it is completed, an email will be sent to the user informing them the import completed successfully or if there were errors.

Using Microsoft Task Scheduler for Import

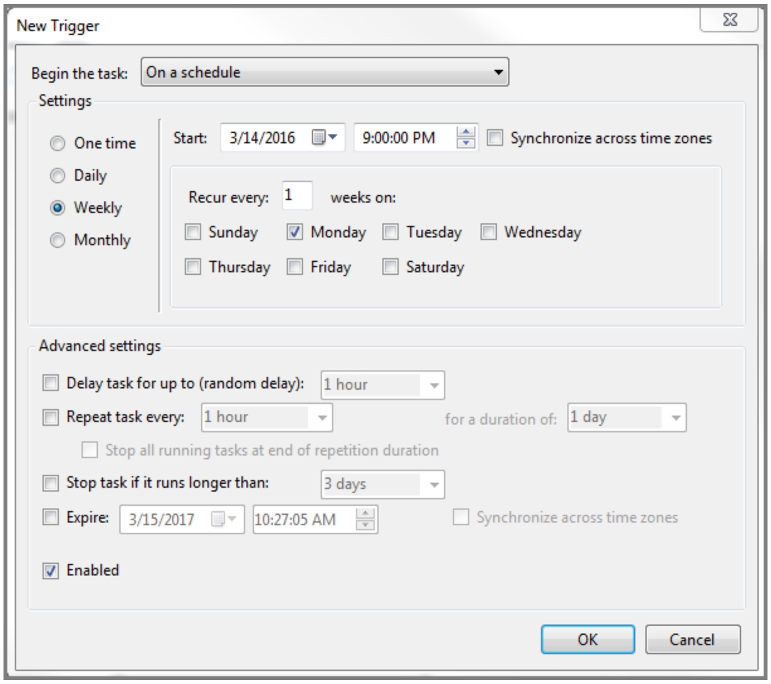
To schedule an automatic import on a regular basis using the manifest file, you can use Microsoft Task Scheduler or any other type of task schedule tool using the commands in the previous section.

Perform the following steps to schedule a task to import the manifest file in Microsoft Task Scheduler:

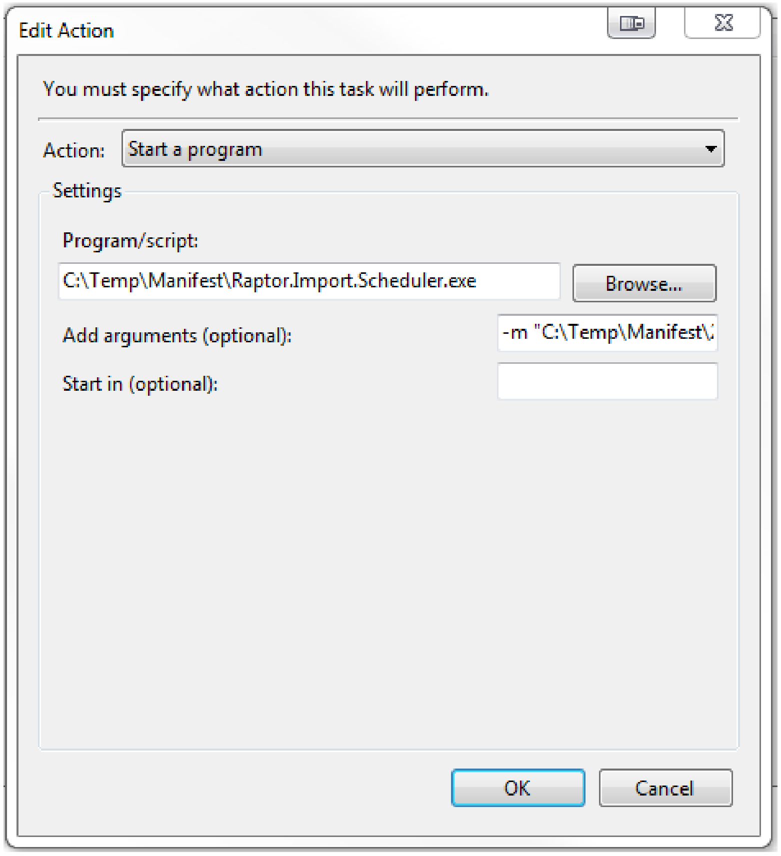
1. On the Windows desktop, click **Start** and type **Task Scheduler** in the search text box.
2. Select **Task Scheduler** to open the application.
3. In the **Actions** column, select **Create Task** and enter a **Name** for the task.



4. Click the **Triggers** tab and then click **New**.
5. On the **New Trigger** dialog, enter the schedule for when you want the import to occur (or have a reoccurring import, such as weekly at 9:00 PM every Monday) and then click **OK**.



6. Click the **Actions** tab and then click **New**.



7. Click **Browse**, navigate to the **Raptor.Import.Scheduler.exe** file, select the file and click **Open**.
8. In the **Add arguments** field, enter the following information:

   ```
   -m <location of your manifest file> -f <location of your
   import file>
   ```

   For example:
9. ```
   -m "C:\Temp\Manifest\customalerts.xml" -f
   "C:\Temp\Manifest\customalerts.xls"
   ```
10. Click **OK**.
11. On the **Create Task** dialog, click **OK** to complete the procedure.
   ```