



**One easy-to-use volunteer
management system.**

User Manual

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INTRODUCTION

VIRA

VIRA (Volunteer Information Records Administrator, pronounced *VEERA*) is a volunteer management database that allows volunteer involving agencies to collect important information about their volunteers. Information such as personal details, volunteer contribution in hours and services provided, recognition, reimbursement and training undertaken can all be recorded in a user-friendly format. Not only does VIRA record information, but also produces a range of reports. These reports can be used to provide accurate, up to date and relevant information to decision makers, policy makers, and program planners, and will assist in more accurate budget preparation and funding submissions.

VIRA and other platforms

VIRA connects with VIKTOR Online, as well as the SEEK Volunteer and GoVolunteer websites. This means any details entered into any of those systems will be brought across to VIRA, saving you re-entering data. To bring a volunteer from any of the above systems into VIRA, you simply need to accept the referral. (Set the referral outcome as **accepted**)

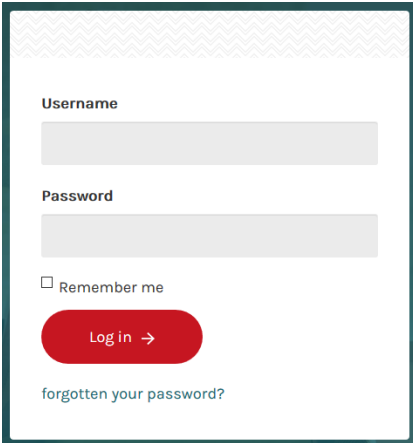
Note that you can view expressions of interest with no outcome entered in the pending section. VIRA can also interface with the Volunteer Profile, allowing volunteers to update their own details.

VIRA Public Access

Since VIRA contains possibly sensitive information, VIRA does not allow the general public access to the system. A volunteer may, however, set up a Volunteer Profile (volunteer.org.au) and update their details from there. Any modifications made to a volunteer's profile data will be reflected in VIRA.

Logging In

VIRA is accessible anywhere with an internet connection. To access VIRA, you simply log in to the VIKTOR Online database at <https://www.vol.org.au/>

A screenshot of the VIRA login interface. It features a white background with a light gray wavy pattern at the top. The form includes a 'Username' label above a text input field, a 'Password' label above a password input field, and a checkbox labeled 'Remember me'. Below the password field is a red 'Log in →' button. At the bottom of the form is a link that says 'forgotten your password?'. The entire form is enclosed in a thin dark border.


Enter your user name and password.

Please be careful not allow the browser to save your password on a publicly accessible machine.

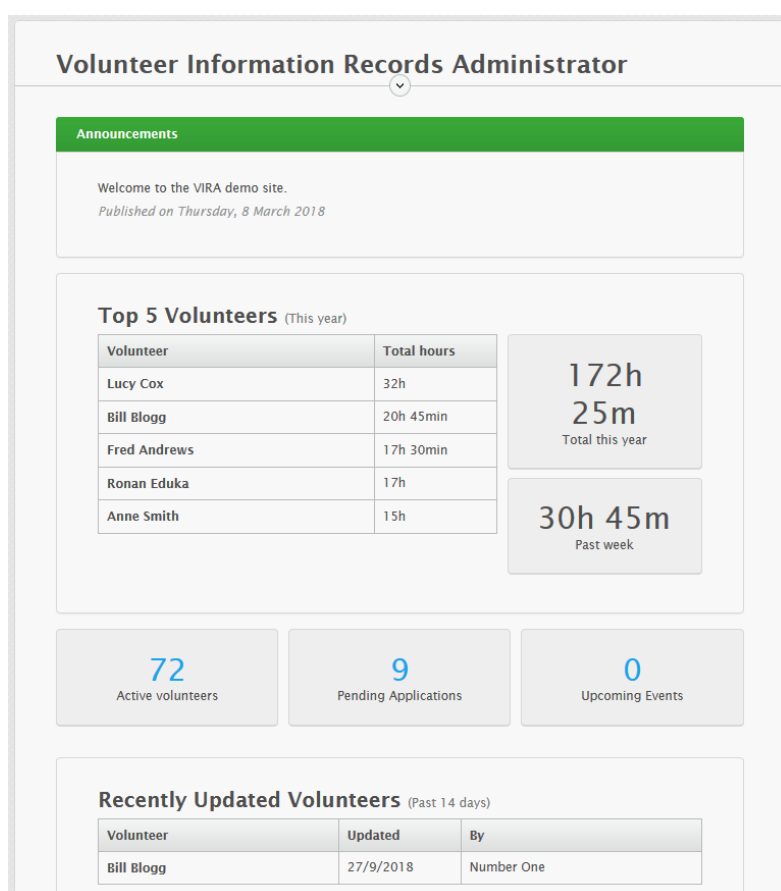
If you forget your password, you can reset it by clicking on the **forgotten your password?** link underneath the login box.

HOME PAGE

Once you successfully log in, you will arrive on the home screen. Here you will find any announcements regarding updates, as well as an overview of volunteer-related information

Click the  tab to enter the volunteer management section and view the **VIRA dashboard**.

DASHBOARD



The **VIRA dashboard** will show any system announcements, the **Top 5 Volunteers** this year, as well as the **total hours this year and this week**. You can also see how many **Active Volunteers**, **Pending Applications** and **Upcoming Events** you have and click on these links to be taken directly to these sections of VIRA.

The VIRA Dashboard also has a **Recently Updated Volunteers** section which tells you which volunteers have been updated over the past two weeks, and who updated them.



At the bottom of the VIRA Dashboard there are also four useful buttons that take you to different sections of VIRA

Edit Volunteers This will take you straight to the **Your Volunteers** section of VIRA

Sign-in-Sheet This will take you straight to the **Sign in Volunteers** section of VIRA which is designed to allow a receptionist to sign in volunteers as they arrive and sign them out as they leave.

 A screenshot of the 'Sign in Volunteers' interface. At the top is the title 'Sign in Volunteers' with a small downward arrow. Below it is a search section with the label 'Select Volunteer' and a text input field containing 'Select Volunteer - Enter a surname to scroll list'. To the right of the input field is a 'Sign In' button. Below the search section is a section titled 'CURRENTLY SIGNED IN' which contains a blue box with the message 'No volunteers have been found.' and '0 volunteer(s) found.' below it.

You can use the **Select Volunteer** drop down list or type in a surname to find the volunteer you want to sign in or out.


You'll be able to see a record of the volunteers currently on-site, and their hours will be automatically calculated when they are signed out.

Note that if the times are incorrect, we may need to adjust your time zone- you can contact support via vira@vol.org.au to arrange this.

Detach sign-in sheet You also have the option to detach the sign in sheet

 A screenshot of the 'Sign in Volunteers' interface, similar to the one above. A green rounded rectangle highlights a button labeled 'Detach sign-in sheet' in the bottom left corner. A small green circle with a white upward arrow is also visible in the bottom right corner of the interface.

Just click on the arrow icon in the middle of the screen underneath it where it says **Sign in**

Volunteers and then click on the  button.

The sign-in sheet will then open up in a separate tab so you can log out of VIRA, but leave the detached sign-in-sheet open in this new tab to allow your volunteers to sign in and out.

This detached sign in sheet will remain active for up to 12 hours, so you can set it up at the start of the day and leave it running for your volunteers to use.

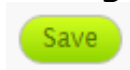
View Calendar This takes you straight to your VIRA Calendar

Help and Manuals This takes you straight to the **Help** section where you will be able to access any relevant manuals.

Timing Out

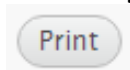
For security reasons if you have not used the database for a set period of time you will be logged out. This works in the same way as electronic banking sites, etc. VIRA will log you out after about an hour of inactivity, but you will get a pop-up warning about a minute before this.

Saving



The save button typically appears on the bottom-right of any pages it is present on. **Remember to save any changes before moving to another page/tab.**

Printing



The Print button typically appears on the bottom-left of any pages it is present on. Clicking the print button creates a PDF file which you can either save or print.

Logging off



The logout button always appears on the top-right of every page. Remember to logout when you are finished.

YOUR VOLUNTEERS

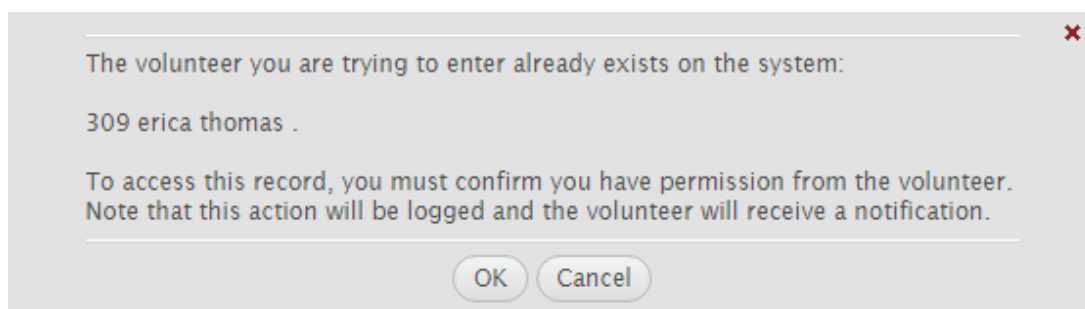
In the **VIRA** tab, you may view your current volunteers by clicking on **Your Volunteers**. You can add a volunteer to this list by accepting a referral, or clicking the **Create new volunteer** button.

There may be an occasion when you go to create a new volunteer that **already exists** in the system. If this happens, VIRA will automatically pick this up with the following message:

Volunteer already exists with ID 862. Viewing existing record.


You will be shown the details of the existing volunteer and can update their information as necessary. **Do not create a duplicate** instance of the volunteer – make sure you always use their **existing record**.

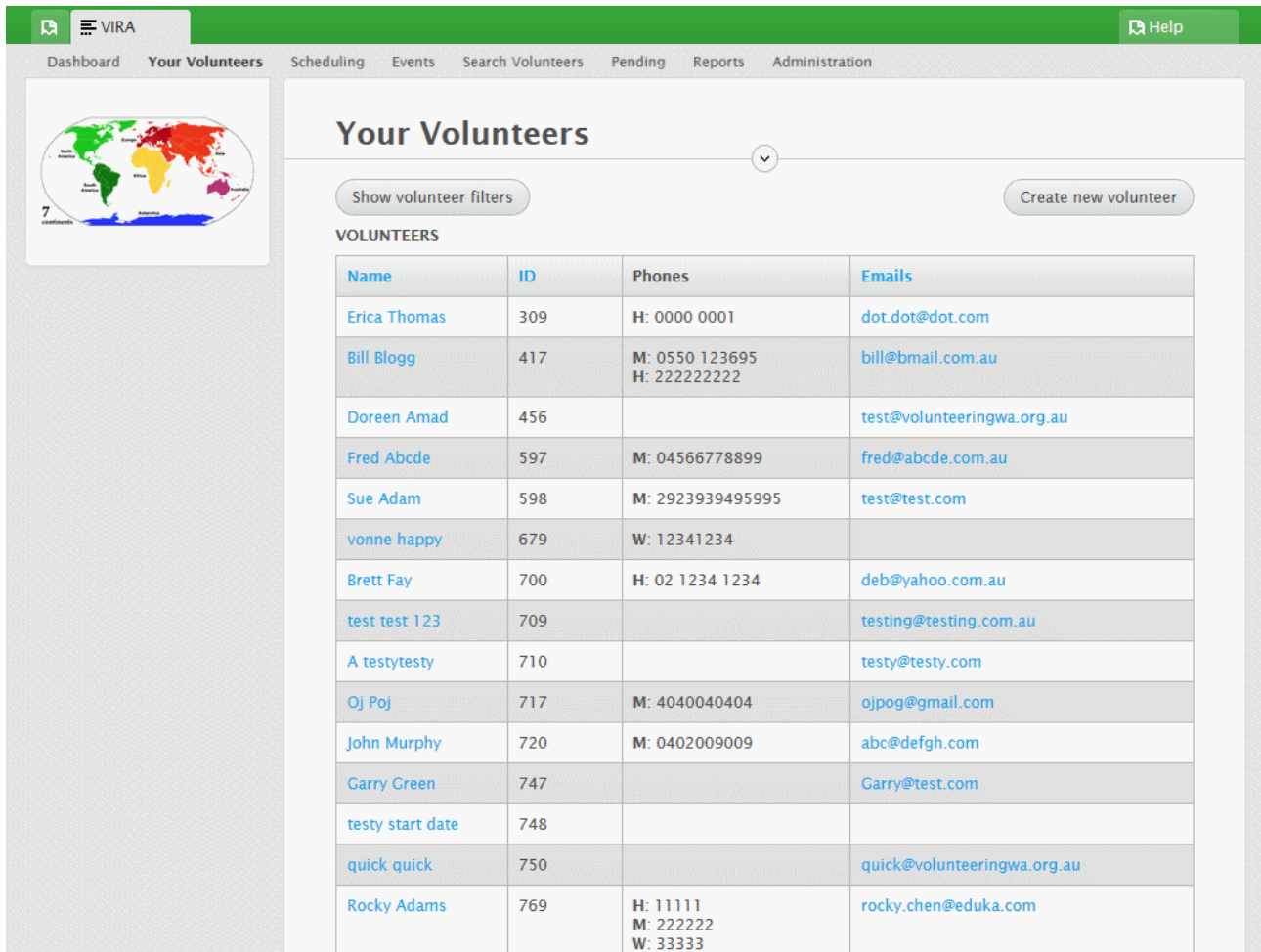
If the volunteer exists in the system but you **do not have permission to access their record**, you will see the following message:



You will need to click the  button to **confirm you have permission from the volunteer** to access their record.

Once you have done this the **volunteer will receive an email notification advising** them that they are now registered with your organisation.

Once you have clicked the  button you will be taken to their **existing record**.



Your Volunteers

Show volunteer filters Create new volunteer

VOLUNTEERS

Name	ID	Phones	Emails
Erica Thomas	309	H: 0000 0001	dot.dot@dot.com
Bill Blogg	417	M: 0550 123695 H: 22222222	bill@bmail.com.au
Doreen Amad	456		test@volunteeringwa.org.au
Fred Abcde	597	M: 04566778899	fred@abcde.com.au
Sue Adam	598	M: 2923939495995	test@test.com
vonne happy	679	W: 12341234	
Brett Fay	700	H: 02 1234 1234	deb@yahoo.com.au
test test 123	709		testing@testing.com.au
A testytesty	710		testy@testy.com
Oj Poj	717	M: 4040040404	ojpog@gmail.com
John Murphy	720	M: 0402009009	abc@defgh.com
Garry Green	747		Garry@test.com
testy start date	748		
quick quick	750		quick@volunteeringwa.org.au
Rocky Adams	769	H: 11111 M: 222222 W: 33333	rocky.chen@eduka.com

When you are using **Your Volunteers** to view your current volunteers you can click on the

Show volunteer filters

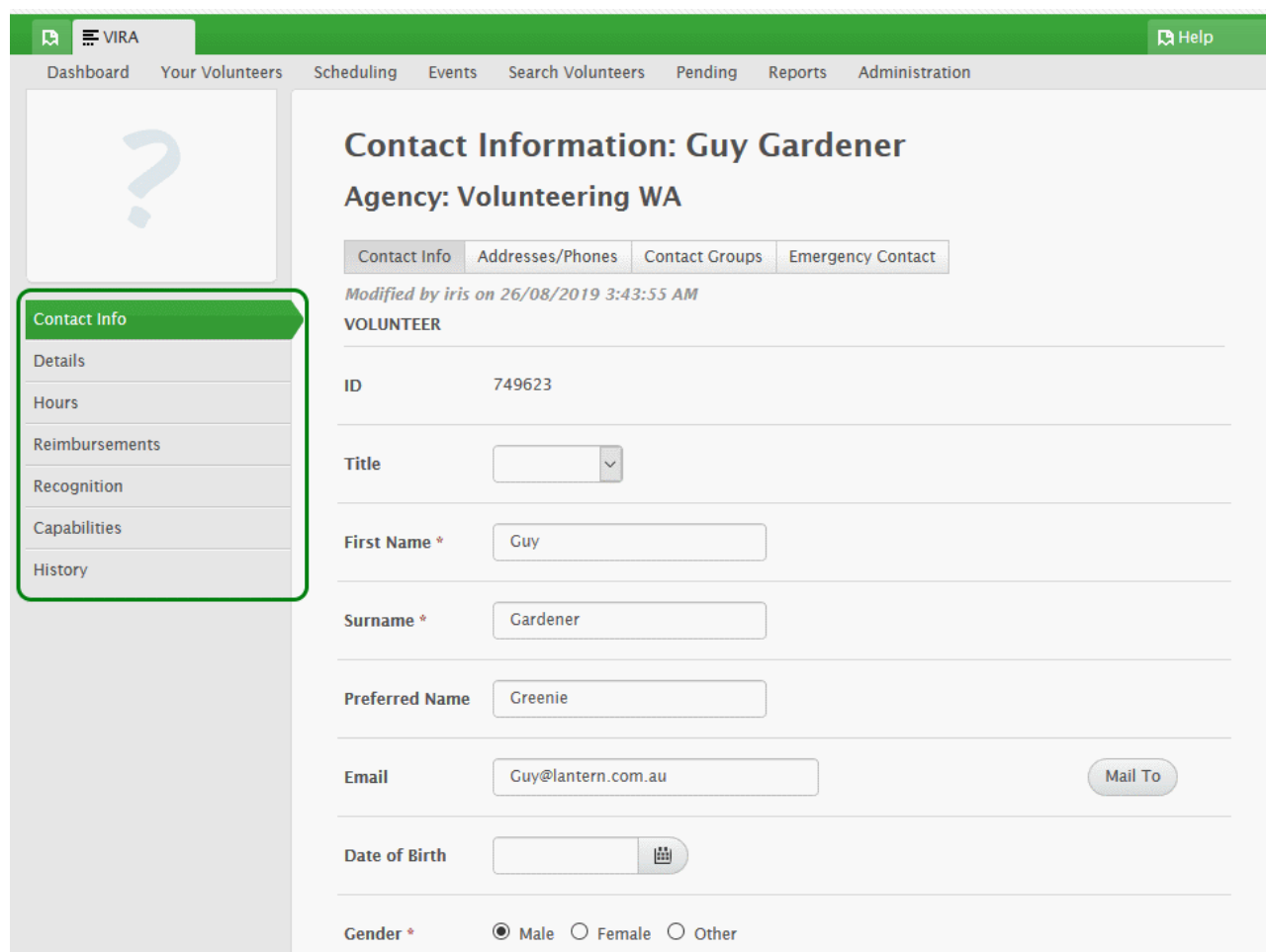
button to display the volunteer search options.

You can search for a volunteer by **name, postcode, email, phone number**, or **any combination** of those. The system will do a partial name match where appropriate.

To view or edit the details of a volunteer simply click on the **volunteer's name**.

VOLUNTEER RECORD

When viewing the volunteer record, you will note the main tabs down the left hand side.



Contact Information: Guy Gardener
Agency: Volunteering WA

Contact Info | Addresses/Phones | Contact Groups | Emergency Contact

Modified by iris on 26/08/2019 3:43:55 AM

VOLUNTEER

ID 749623

Title

First Name *

Surname *

Preferred Name

Email

Date of Birth

Gender * ☒ Male ☐ Female ☐ Other

Contact Info holds basic volunteer details such as name, address, phone numbers, emergency contact details, contact groups they belong to, etc.

Details holds important personal, demographical and statistical information about the volunteer, the languages they speak, when they are available, and their current status, etc.

Hours holds a record of the volunteer's volunteering history, showing their previous positions and the hours contributed in each position

Reimbursements shows all previous reimbursements the volunteer has received, including the amount and reason for reimbursement

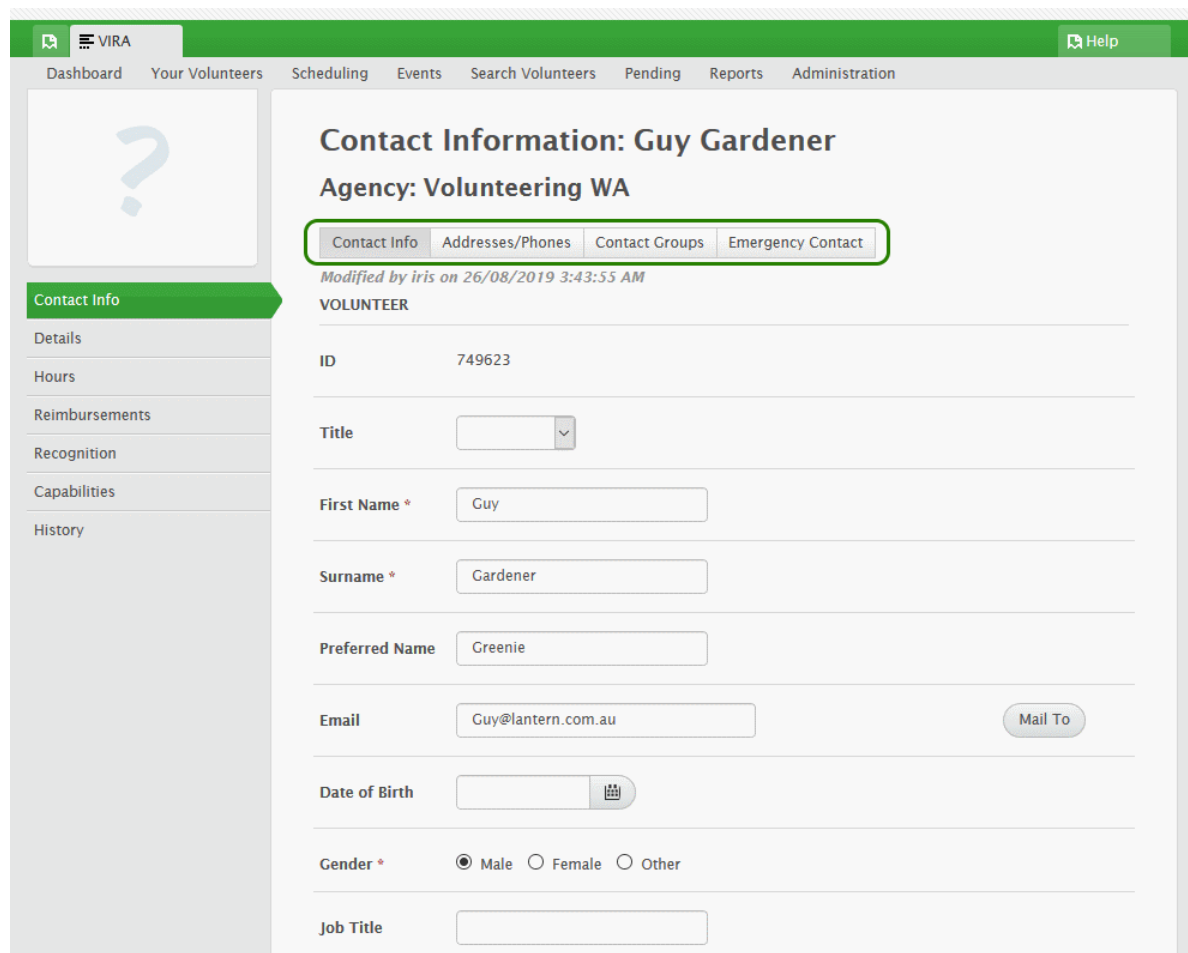
Recognition stores the different types of recognition the volunteer has received

Capabilities contains any certificates and checks, including expiry dates, that the volunteer currently holds. Also included are records of any training received, and permissions granted.

History displays any notes made regarding that particular volunteer, as well as their CV, and files attached to the record, and any positions they have previously volunteered for.

CONTACT INFORMATION

This section enables you to store contact information and basic details about the volunteer. This section is typically prepopulated by information from VIKTOR or Volunteer Profile. If the volunteer was manually added you will need to complete this section. There are four areas for data under the Contact Info section, **Contact Info**, **Addresses/Phones**, **Emergency Contact**, and **Groups**.



Contact Information: Guy Gardener
Agency: Volunteering WA

Modified by iris on 26/08/2019 3:43:55 AM

VOLUNTEER

ID 749623

Title

First Name *

Surname *

Preferred Name

Email

Date of Birth

Gender * ☒ Male ☐ Female ☐ Other

Job Title

Contact Info is the section used to hold the volunteer's name, preferred name, email address, as well as other basic details such as title, date of birth and gender. **Job Title** and **Company** relate to the volunteer's regular employer, and can be entered if applicable and relevant. These fields are commonly used for corporate volunteers, and are optional.

You can also upload a volunteer's photo here, and it will be displayed at the top left of the record. There will also be a note on this tab if the volunteer has set up a Volunteer Profile.

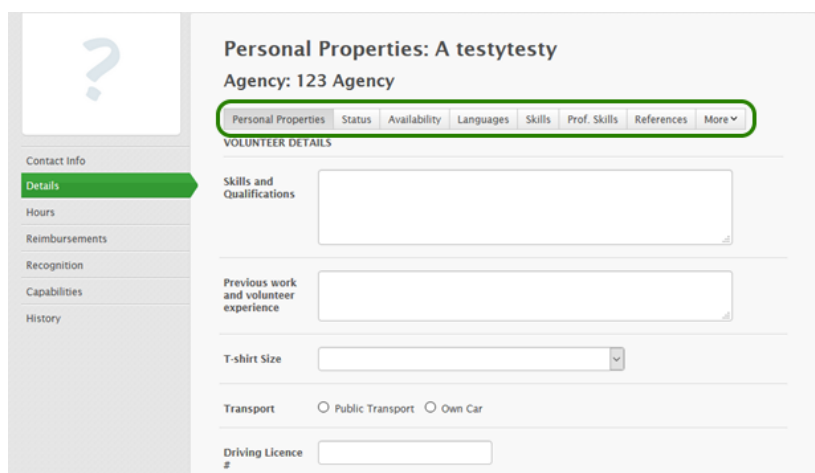
Addresses/Phones is the section used to hold the volunteer's contact address(es) and phone/fax number(s). You can store multiple phone numbers and addresses in this section, and flag which address to use as the mailing address.

Contact Groups lists all the contact groups the volunteer belongs to. You can add the volunteer to any number of contact groups, or remove them from groups here. Contact groups are set up in the Contact Management section. If you need access to this, please contact support.

Emergency Contact holds the volunteer's emergency contact information.

DETAILS

Across the top of the details tab are the subsections holding the volunteer data.



Personal Properties is used to record specific information about the volunteer, such as T-shirt size, transportation details, dietary requirements etc. This entire section is optional.

Status records if the volunteer is currently volunteering and, if applicable, the program they are assigned to. This is also where you would add a volunteer to a program. You can add a new program type using the Administration tab. When a volunteer finishes volunteering with your organisation, make sure you record this by using the **Finish Volunteering** button and select a reason why. You will have the option to remove a volunteer from all contact groups when finishing volunteering.

Availability holds the time of day and days of the week that the volunteer is available. This section is optional.

Languages shows any other languages that the volunteer speaks. This section is optional.

Skills show information regarding what skills the volunteer wishes to use when they volunteer, as well as any particular areas that they wish to help out in

Prof. Skills contains detailed information regarding the professional skills that the volunteer has, as well as the length of time they have been using those skills.

References allows you to store the details of up to two references for the volunteer. This section is optional.

Statistics can be found under the **More** drop down. This section records detailed demographical information about the volunteer which is used to create reports. This section is optional, but if not completed will affect reporting output.

Tags can also be found under the **More** drop down. **Tags** are special tags that you create for your organisation. They can be attached to both volunteers and positions, and are kind of like a custom way to link volunteers and positions.

HOURS

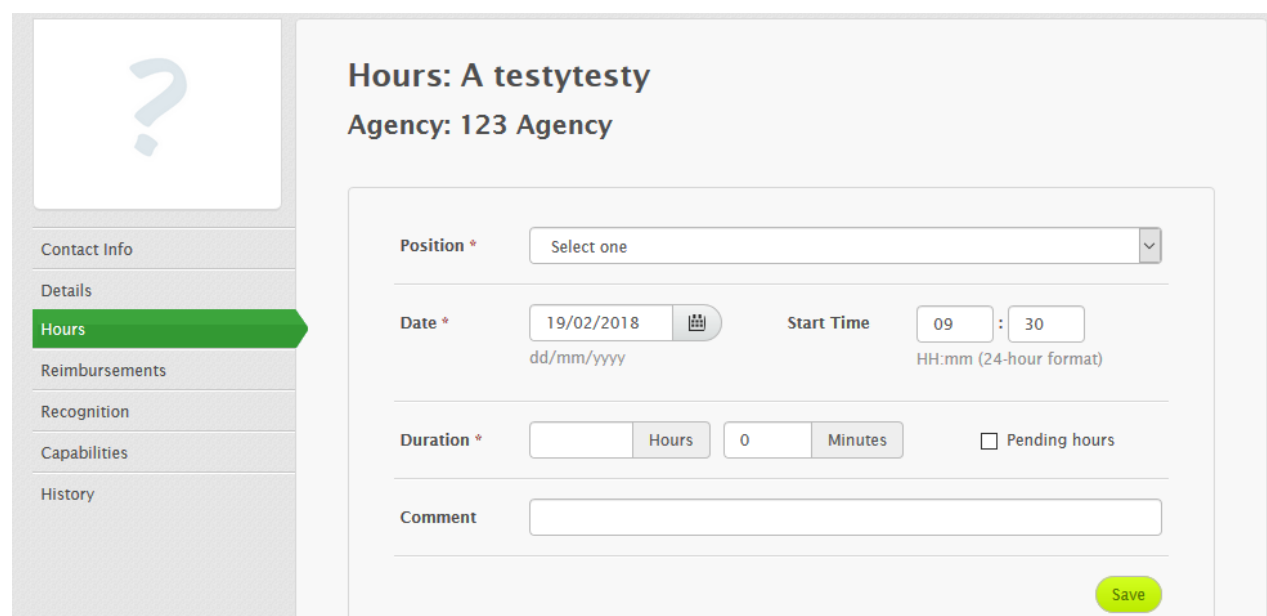
This section holds a record of the time each particular volunteer has spent volunteering, as well as the position they were in.



The screenshot shows the 'Hours' section for a volunteer named 'A testytesty' at '123 Agency'. On the left is a sidebar with navigation links: Contact Info, Details, Hours (highlighted), Reimbursements, Recognition, Capabilities, and History. The main content area has a title 'Hours: A testytesty' and 'Agency: 123 Agency'. There is an 'Add hours' button in the top right. Below the title is a table with columns: Date, Hours, Minutes, and Position. The table contains one record for '19/02/2018' with '5' hours and '0' minutes, for the position 'admin officer'. An 'Edit' button is next to the record. Below the table, it says '1 Accepted record(s) found.'.

Date	Hours	Minutes	Position
19/02/2018	5	0	admin officer

To add in hours, click on the **Add hours** button. You may enter data for each occasion, weekly, or monthly as you choose. The more detail you enter, the more accurate your reporting will be.



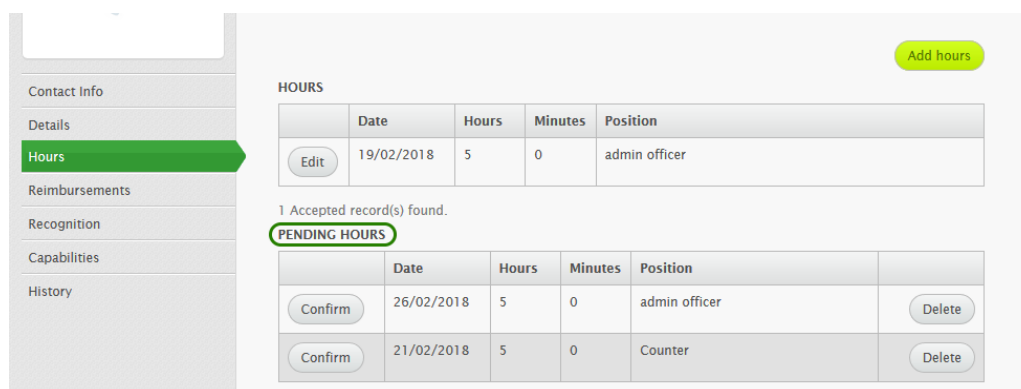
The screenshot shows the 'Add hours' form for the same volunteer. The sidebar is the same. The main content area has the same title and agency. The form fields are: Position (a dropdown menu with 'Select one'), Date (a date picker showing '19/02/2018'), Start Time (a time picker showing '09:30'), Duration (a field for hours and minutes, currently '0' hours and '0' minutes), and a checkbox for 'Pending hours'. There is a 'Comment' text area at the bottom. A 'Save' button is in the bottom right corner.

Position is the general position the volunteer was working on. This is drawn from your main position list.

Date is the date the volunteering took place on. If you are recording multiple instances, put the date on the last occurrence.

Start Time is the time the volunteer started on this day.

Hours and **Minutes** record the time spent volunteering.



Date	Hours	Minutes	Position
19/02/2018	5	0	admin officer

1 Accepted record(s) found.

PENDING HOURS

Date	Hours	Minutes	Position
26/02/2018	5	0	admin officer
21/02/2018	5	0	Counter

Note that Pending Hours will also be displayed in this section (if any exist for this volunteer). Pending hours will have been entered by the volunteer, you can either confirm or delete any pending hours.

You can also delete hours from the main section by editing them, flagging them as pending, and then deleting them.

Scheduling

This tab lets you plan out a recurring shift schedule for the volunteer. You can enter the date the schedule starts, the frequency, the times the volunteer will attend, and (optionally) an end date. The end date is when the volunteer's scheduled time ends, and should be set as the day after their last day.




Schedule: Guy Gardener
Agency: Volunteering WA

Hours **Schedule**

SCHEDULES

Start Date	Day	Frequency	Start Time	Duration	Position
3/12/2019	Tuesday	Weekly	09:00	4:0	Backy...
3/12/2019	Tuesday	Fortnightly	09:00	4:0	Assiti...

2 scheduled recurring hours record(s) found.

Volunteers may have multiple shifts active where needed. To add a scheduled shift, click  to create the record, then enter the **Start Date**, **End Date**, and **Frequency**. Then enter the details for the hours the volunteer will do.

Schedule: Guy Gardener
Agency: Volunteering WA

Hours | Schedule

Start Date * 28/01/2020 End Date dd/mm/yyyy (optional) If present, the schedule will end (and be removed) on this date

Frequency * Weekly

Vira hours details

Position * Select one

Start Time 00 : 00 HH:mm (24-hour format)

Duration * 0 Hours Minutes

Comment

Cancel Save

The hours entered will accumulate automatically over the selected date range. You can view an overall schedule in the **Scheduling** tab

REIMBURSEMENTS

This tab keeps track of all reimbursements paid to a volunteer.

Reimbursements: A testytesty
Agency: 123 Agency

Date (dd/mm/yyyy) * 19/02/2018

Reimbursement Type * Select one

Amount *

Add

	Date	Type	Amount
Edit	15/02/2018	Fuel	\$20.00

To add a reimbursement, select the **Reimbursement Type** then enter the **Date** and **Amount**. Click  to save the record to the list.

RECOGNITION

This tab stores all recognition events for this volunteer.

Recognition: A testytesty
Agency: 123 Agency

Date (dd/mm/yyyy) * 22/02/2018

Recognition Type * Select one

RECOGNITION	
Date	Type
12/02/2018	Personal thank you

To add a record of recognition, enter the date and select the type. Click to save the record to the list.

CAPABILITIES

This section has tabs allowing you to record **Certificates** the volunteer has (police check, etc) and when they expire. It also stores any **Training** the volunteer has done, and any **Permissions** they have granted.

Certificates: A testytesty
Agency: 123 Agency

Certificates Training Permissions

Certificate Type * Select one

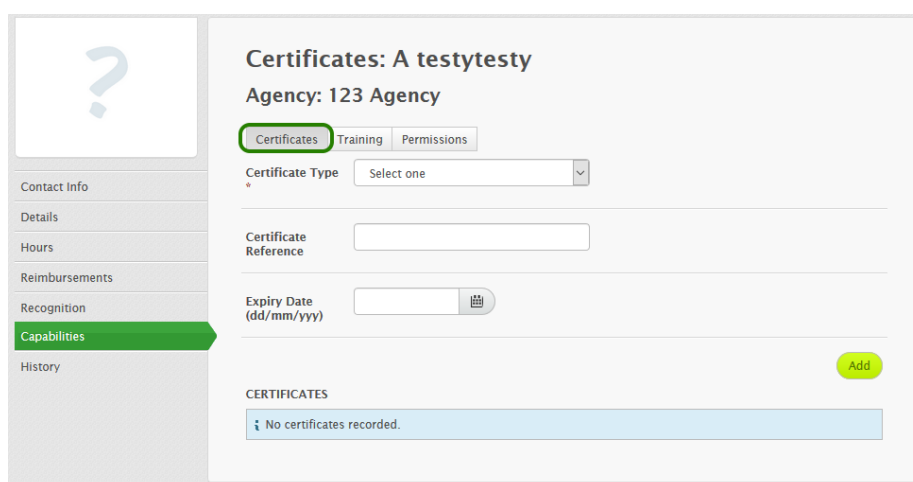
Certificate Reference

Expiry Date (dd/mm/yyyy)


CERTIFICATES

No certificates recorded.

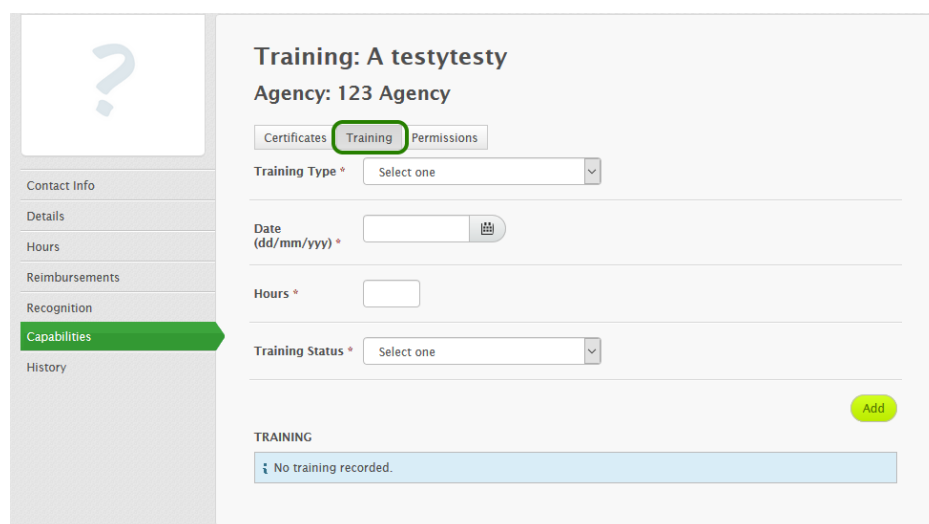
Certificates



This relates to the certificates often required to volunteer. It includes three types by default- a National Police Clearance, a Working with Children check, and a First Aid Certificate. You can add additional types in the administration section.


To add a certificate to the volunteer, select the **Certificate Type** from the drop down menu then, if necessary, enter a **Certificate Reference** number for the certificate. You then need to enter an **Expiry Date** which is essential as this notifies you when the volunteer's certificate needs renewing. Once you have done this click on  to save all of the details.

Training



This a record of any training the volunteer has received. You can add training types in the administration section.

To add a record select the **Training Type** from the drop down menu and then enter the **Date** it took place, the number of Hours it took place for and the **Training Status** which allows you to record whether it was completed or not.

Once you have done this click on  to save all of the details.

Permissions

The screenshot shows the 'Permissions' page for a volunteer named 'A testytesty' at '123 Agency'. On the left is a sidebar with a menu: Contact Info, Details, Hours, Reimbursements, Recognition, Capabilities (highlighted in green), and History. The main content area has tabs for Certificates, Training, and Permissions (highlighted with a green box). Below the tabs, there is a 'Permission Type' dropdown menu with 'Select one' and a 'Date (dd/mm/yyyy)' input field with a calendar icon. An 'Add' button is in the top right. Below these fields, a section titled 'PERMISSIONS' contains a message: 'No permissions recorded.'

This helps you to keep track of the permissions the volunteer has allowed. (eg: if you are allowed to publish their name or photo) You can add additional types in the administration section. To add a permission you need to first select the **Permission Type** from the drop down menu and then enter the **Date** it is valid until.

Once you have done this click on  to save all of the details.



HISTORY

The section allows you to record useful general information about the volunteer and their recent history.

The screenshot shows the 'Notes' page for a volunteer named 'A testytesty' at '123 Agency'. The sidebar is the same as in the previous screenshot. The main content area has tabs for Notes, CV, Files, and Positions (highlighted with a green box). An 'Add New' button is in the top right. Below the tabs, a section titled 'VOLUNTEER NOTES' contains a message: 'This volunteer does not have any file notes. Please click on the Add New button to add a note.'

Notes

This section includes any notes made by VIRA users about the volunteer. Notes are used to track instances of communication with a volunteer. The name of the user making the note is stored, along with the date. This section can be used to keep a record of conversations or interviews with the volunteer.

Click on  to enter a new note record for the volunteer. Start by selecting a **Date** and then **Communication Type** and then enter your **Note** making sure you click on  once you have finished. You can also lock a file note to prevent it being edited- once you do this, you won't be able to unlock it, so be sure you want to do that! 😊

CV

If the volunteer has uploaded one, their CV will be available for download here. You can also upload a copy of the volunteer's CV here if they haven't already uploaded one themselves.

Files

This section allows you to store files you want to upload to a volunteer record. For example you might want to scan and upload copies of certificates here.

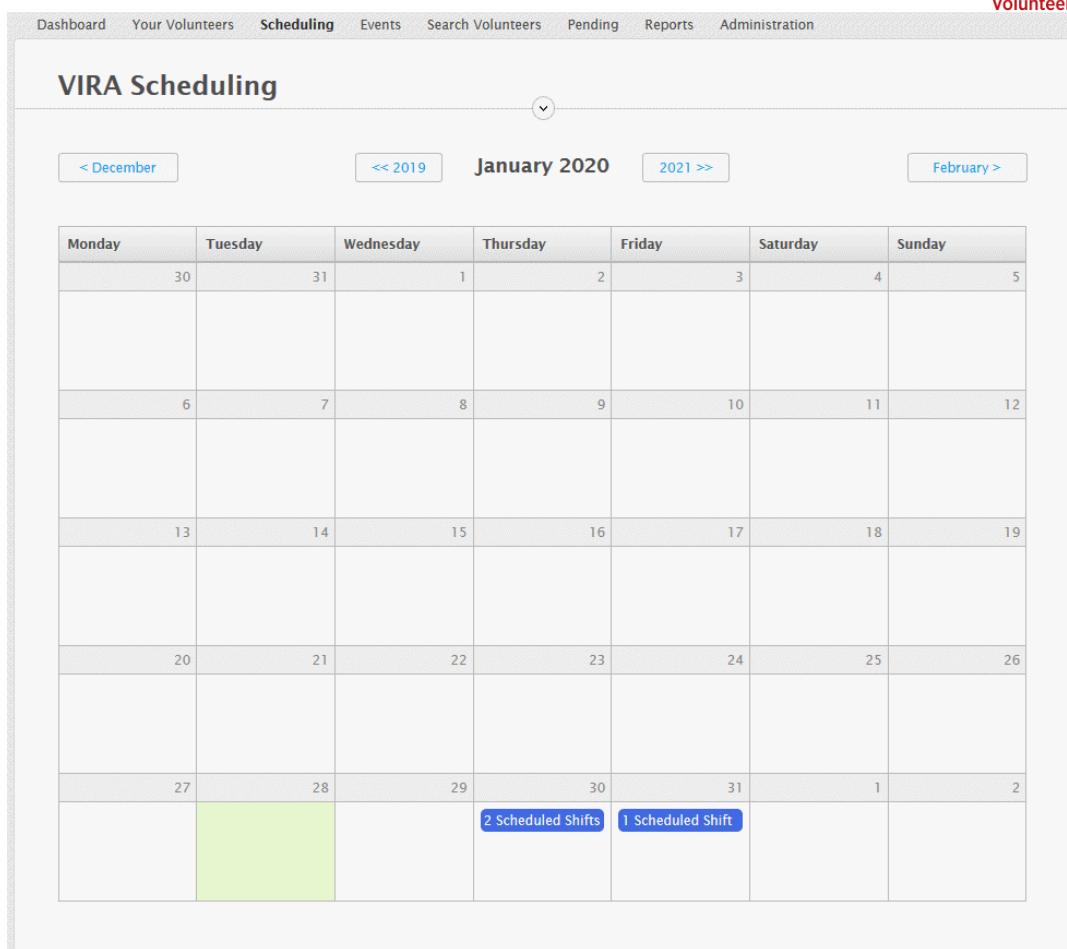
Positions

This section will display a list of positions the volunteer has been accepted for. You can also add positions to the volunteer here if they are not already showing.

If the volunteer has a Volunteer Profile, they can then use their profile to add hours for these positions. You will then be able to verify any hours they add either in the hours section of their volunteer record or in the Pending section.

SCHEDULING

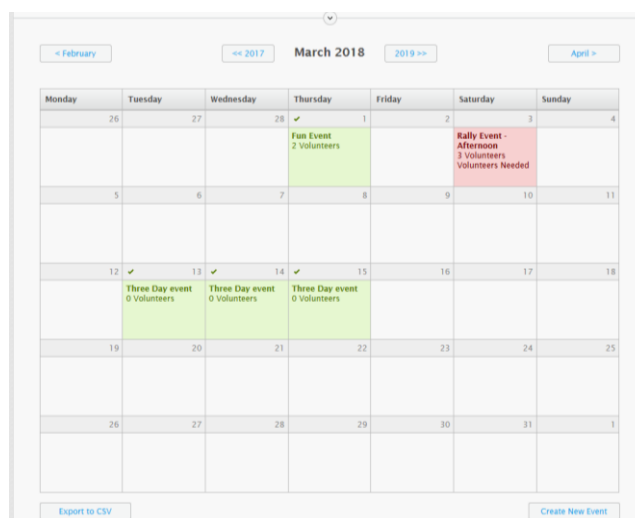
When you click on the **Scheduling** tab, you will be given an overview of the volunteers you have scheduled. You can click on any individual day to see the volunteers you have scheduled (if the day is in the future), or the volunteers recorded as attending (if the day is in the past).



You can update hours in the volunteer record if you need to adjust them

EVENTS

When you click on the **Events** tab you will be taken to your calendar where upcoming events in the current month's calendar for your organisation will be shown.



To create an event, click on the **Create New Event** button in the bottom right hand corner, or click on the date which it is occurring on if it's currently blank.

To export the current month to a spreadsheet click on the **Export to CSV** button.

Calendar Event
Agency: 123 Agency

Date * 03/03/2018

Name

Description

Notes

Start Time * 09 : 00
(HH:mm) Please use 24-hour format

End Time * 17 : 30
(HH:mm) Please use 24-hour format

Position Select one
This position will have the option to automatically send EOIs to this event, and you will be able to send all the hours to the volunteer records with the 'Send Hours' button below.
The event is linked via the notification tab of this position.

[Back to calendar](#)

Once you created a new event (or edited an existing one), you will be taken to the **Calendar Event** page for the event. Here is where you want to fill in the details of the event, such as the name, description and any relevant notes for the event. You should also input the start time and end time of the event as well as selecting the relevant position title.

Once this information has been completed, click **Save** to create the event.

☐ **Volunteers Required**

3

Rally Event - Afternoon
3 Volunteers
Volunteers Needed

Delete Event

The **Volunteers Required** tick box on this page changes whether the event appears green or red in the calendar. You need to tick this box if volunteers are required – the event will then show in **red**. You then need to manually update this once the event has reached its required number of volunteers by unticking this box – the event will then appear in **green**.

✓ 3

Rally Event - Afternoon
3 Volunteers

The **Delete Event** button allows you to remove an event if it is no longer needed.

Generate event mailing list

Generate Event Mailing List will create a new contact group with all volunteers in the event. You can use this to email or SMS reminders and updates. *You will need access to the Contacts tab to use this feature, please contact us to arrange this.*

Recurring Event

You can make an event recurring by clicking the **Recurring Event** button.

This will make the current event recurring for a length of time that you specify. ✕

Weekly events happen on the same day each week, and you can have up to 3 months at a time.
Fortnightly events occur every second week.
Four-weekly events occur on the same day every fourth week. (IE: Every fourth Monday)
Monthly events are on the same day of each month, and you may set up a year in advance.

The event will be copied, but you will be able to assign different volunteers to each instance.
You may adjust the date of any instance - click it in the calendar view, and update the date field.

☒ Every Week

☐ Every Two Weeks

☐ Every Four Weeks

☐ Monthly (set day)

Occurrences

12

Make Recurring

Cancel

When you click on the **Recurring Event** button the above pop up will appear. This will give you the option to have the event occur weekly, every two weeks, every four weeks or monthly. Note that the **Every Four Weeks** option will occur on the same day every fourth week, while the **Monthly (set day)** option will occur on the same day of each month, for example the 5th of each month.

The **Quick Add** or **Search Volunteers** buttons can be used to add volunteers to the event.

If you know which volunteer you want to add to the event, click on the **Quick Add** button and a drop-down list will appear containing all of your volunteers.

Save

Quick Add

Search Volunteers

Volunteer * ▼

Add To Event

VOLUNTEERS

	Name	Email	Role	Start	End	
859	Andy Adams	one@volunteeringwa.org.au		09:00	17:00	✕

1 volunteer(s).

Send Hours

Export to CSV

Select the name of the volunteer you want to add to the event and click

Add To Event

[Back to calendar](#)

VIRA Calendar Volunteer

EVENT

Agency 123 Agency Date Saturday 3 March 2018 Event Rally Event - Afternoon Rally Event - Afternoon

VOLUNTEER

Volunteer ID 874

Name Greg Flop

Email Greg@floppy.com.au

Phone 0862624343 (Work)

Role

Start Time * :
(HH:mm) Please use 24-hour format

End Time * :
(HH:mm) Please use 24-hour format

[Save](#)

You will then be taken to a page similar to the above where you can then review their details, type in the position they will be filling, and click [Save](#).

The [Search Volunteers](#) button allows you to search through volunteers associated with your organisation.

Click on **Filter** to display all volunteers, or use the **Advanced Skills** filter, keyword search for **Skills/History/Hobbies** or **Show Additional Filters** section to further refine your search.

This view provides some basic information on each volunteer, but you can view more specific details regarding a volunteer by clicking on the **View details** link. If the volunteer has a CV attached to their Volunteer Profile it will be available for download from here.

To add a particular volunteer to your event, click on the **Add to event** link. This will take you to a summary page, showing you which event you are adding the volunteer to.

This summary page also gives an overview of the volunteer and the event you are adding them to.

Be sure to add in the position the volunteer is fulfilling, as well as the correct hours they will be working.

Once you are satisfied the information is correct click the **Save** button.

Any volunteers you add to an event will appear at the bottom of the page in the **Volunteers** table. To send an email to a volunteer just click on their **email address**.

☒ Volunteers Required

Delete Event Recurring Event Save

Volunteers Attending

Quick Add Search Volunteers

VOLUNTEERS

	Name	Email	Role	Start	End	
862	Bruce Evans	test@volunteeringwa.org.au		12:00	17:30	✗

1 volunteer(s).

Send Hours Export to CSV

Once you have used **Quick Add** or **Search Volunteers** to add volunteers to your event you can use the **Send Hours** button to transfer any hours you have entered for them for the event to their volunteer record.

It is important that before you do this you make sure you have finalised all the volunteers for the event and entered the correct hours for each volunteer.

Volunteers Attending

Quick Add Search Volunteers

VOLUNTEERS

	Name	Email	Role	Start	End	
862	Bruce Evans	test@volunteeringwa.org.au		12:00	17:30	✗

1 volunteer(s).

Send Hours Export to CSV

Once you are ready click on **Send Hours** and the following screen will then pop up

This will add the listed hours to each volunteer record. Do you want to proceed? ✗

Send Cancel

Click on **Send** to calculate the hours and send them straight to each volunteer record.

This will save you having to go into each individual volunteer record and manually adding these hours.

SEARCH VOLUNTEERS

The **Volunteer Search** allows you to search through your agency's current and previous volunteers, matching on a variety of criteria. Without inputting any criteria, all volunteers will be displayed

when you click on

Filter

You can refine your search using the **Advanced Skills** filter or keyword search for **Skills/History/Hobbies** based on specific skills you are looking for, or click the

Show Additional Filters

button to display a more comprehensive criteria list.

Once the list of volunteers is displayed you will see basic information displayed, such as gender/age, location and skills. To view more detailed information click on the [View details](#) link for each volunteer. If the volunteer also has a CV uploaded it will be available for download here.

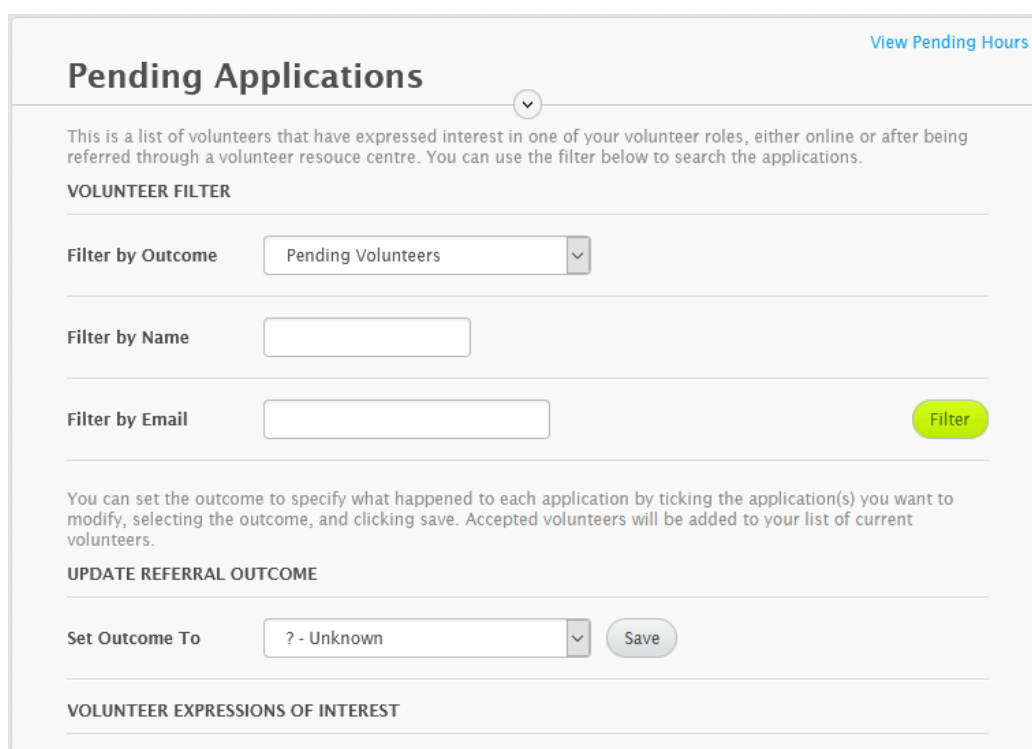
Export to CSV

The button creates a csv file containing every volunteer associated with your organisation. This can be useful for creating an email list as each volunteer's email is stored here.

PENDING

The **Pending** section lets you view either a summary of **pending volunteer applications**, or **pending hours**. Click the navigation link in the top right hand corner to switch between [View Pending Applications](#) and [View Pending Hours](#).

Pending Applications



Pending Applications [View Pending Hours](#)

This is a list of volunteers that have expressed interest in one of your volunteer roles, either online or after being referred through a volunteer resource centre. You can use the filter below to search the applications.

VOLUNTEER FILTER

Filter by Outcome Pending Volunteers

Filter by Name

Filter by Email [Filter](#)

You can set the outcome to specify what happened to each application by ticking the application(s) you want to modify, selecting the outcome, and clicking save. Accepted volunteers will be added to your list of current volunteers.

UPDATE REFERRAL OUTCOME

Set Outcome To ? - Unknown [Save](#)

VOLUNTEER EXPRESSIONS OF INTEREST

These are expressions of interest regarding volunteer positions from VIKTOR or other linked systems. You can fully manage the positions in VIKTOR, and the **Pending Applications** section of VIRA can record the outcome of the expressions of interest by ticking the volunteers you want to update, selecting the outcome, and clicking **Save**. You can also use the filters to search for specific volunteers, or switch to viewing volunteers that have been accepted or declined.

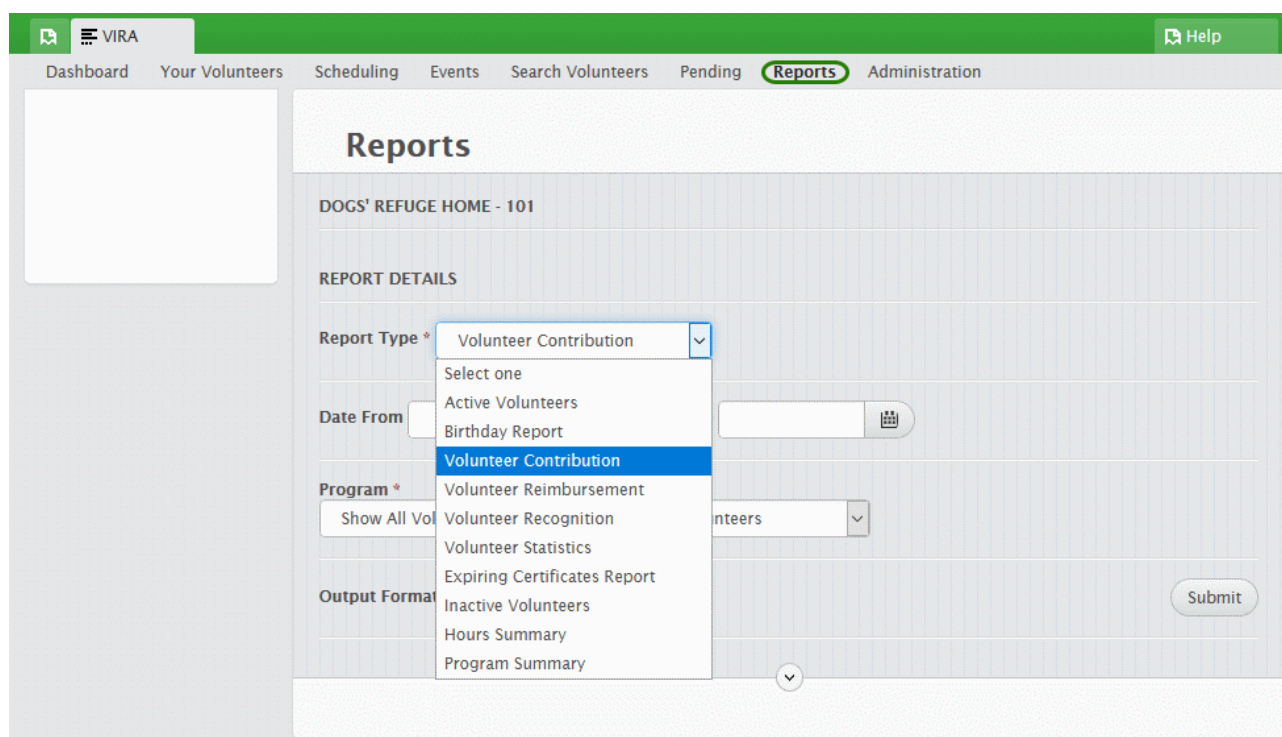
In addition, you can also use the [Export to CSV](#) and [Export Details to CSV](#) buttons at the bottom of this section to export the details of the volunteers listed. This can be useful during the follow up process if you need to contact volunteers or if you want to review the details of volunteers who have expressed interest in positions you have listed.

Pending Hours

These are hours that your volunteers have recorded on their Volunteer Profile. As the volunteer manager, here you can confirm or delete the hours they have entered.

REPORTS

The reports tab provides access to several different reports.



The screenshot shows the VIRA web application interface. At the top is a green navigation bar with the VIRA logo and a 'Help' button. Below this is a grey navigation bar with tabs: Dashboard, Your Volunteers, Scheduling, Events, Search Volunteers, Pending, Reports (highlighted), and Administration. The main content area is titled 'Reports' and shows 'DOGS' REFUGE HOME - 101'. Under 'REPORT DETAILS', there are three dropdown menus: 'Report Type *' (showing 'Volunteer Contribution'), 'Date From' (with a calendar icon), and 'Program *' (showing 'Volunteer Reimbursement'). A 'Show All Volunteers' button is also present. A 'Submit' button is at the bottom right. A dropdown menu is open for 'Report Type', listing options: Select one, Active Volunteers, Birthday Report, Volunteer Contribution (highlighted), Volunteer Reimbursement, Volunteer Recognition, Volunteer Statistics, Expiring Certificates Report, Inactive Volunteers, Hours Summary, and Program Summary.

In this section you can choose from any of the following **Report Types**:

Active Volunteers:

This report produces a list of all current volunteers on the system. You can use this to create a phone/email or mailing list.

Birthday Report:

To use this report, you must select a month. The system will then return all volunteers with a birthday in that month.

Volunteer Contribution:

To use this report, you must select a date range. The system will list the total volunteer contribution (hours worked) in that date range, broken down by volunteer and task.

Volunteer Reimbursement:

To use this report, you must select a date range. The system will list the total reimbursement paid to each volunteer, broken down by type.

Volunteer Recognition:

This report lists all the volunteer recognition events that occurred in a selected date range.

Volunteer Statistics:

This lists all active volunteers and associated statistical information. It can be useful to output this in excel format to produce detailed statistics.

Expiring Certificates:

This report produces a list of all the volunteers with certificates expiring in the selected date range. You can also select a specific certificate if you want to view only one.

Inactive Volunteers:

This report produces a list of all past volunteers on the system.

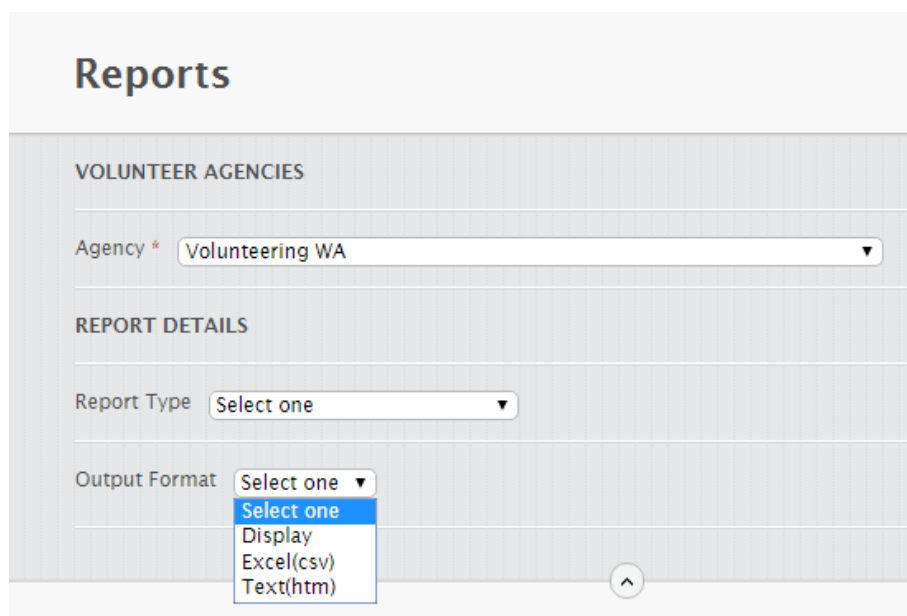
Hours Summary:

This report is similar to volunteer contribution, but produced in a flat format more suitable for exporting to excel.

Program Report:

This report gives you a summary of each volunteer program, and the hours volunteered.

Once you have selected your **Report Type** you can then choose the **Report Output**:



The screenshot shows the 'Reports' section of the VIRA interface. It includes a 'VOLUNTEER AGENCIES' section with an 'Agency *' dropdown menu set to 'Volunteering WA'. Below this is the 'REPORT DETAILS' section, which contains a 'Report Type' dropdown menu set to 'Select one' and an 'Output Format' dropdown menu. The 'Output Format' menu is open, showing options: 'Select one' (highlighted), 'Display', 'Excel(csv)', and 'Text(htm)'. A 'Submit' button is visible at the bottom right of the form.

Each report can be:


- Displayed on the screen
- Exported as an Excel spread sheet (CSV)
- Exported as a text file (HTML)
- Filtered by Program
- Filtered by tag

Select your desired format in the **Output Format** drop-down, and then click  to produce the report.

Note that Excel output is useful for extracting statistics or importing into other software.

ADMINISTRATION

This tab is where you update your settings and preferences.



Volunteer Programs - Agency Administration

Create new program

VOLUNTEER PROGRAMS

ID	Program	Edit	Delete
32	Telescope Users	Edit	Delete
33	General Meeting	Edit	Delete
50	Group61 Elders	Edit	Delete
54	Elderly Visiting team	Edit	Delete
55	Library Volunteers	Edit	Delete
63	Food Preparation	Edit	Delete
65	Visitor Servicing	Edit	Delete
70	Drivers	Edit	Delete
73	Transport	Edit	Delete

9 programs(s) found.

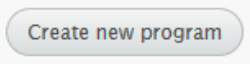
Programs are a way to classify your volunteers. They can be useful to represent separate volunteering programs, different sites, or similar data.

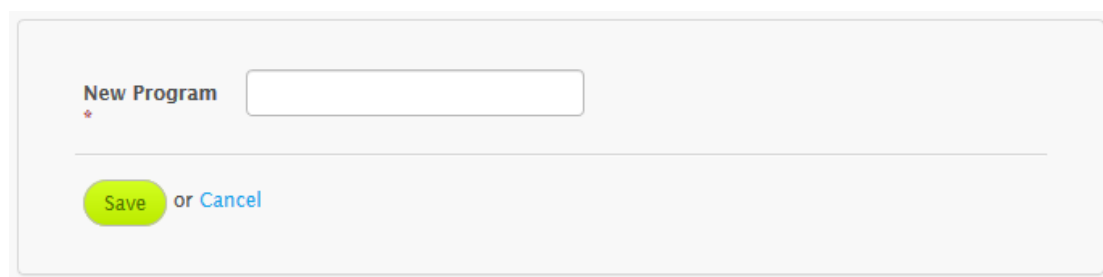
Each volunteer may belong to only one program, and reports may be filtered by the programs you define. If you are trying to create mailing lists, consider using contact groups instead- they are more flexible, and volunteers may belong to multiple groups.

Programs

This section allows you to create or edit programs. Programs are how you group volunteers for administrative reasons, and are defined by your organisation. This can be useful for reporting when you have a large number of volunteers. By creating your own specific programs you can then group your volunteers. This means that you can run a report on one particular group of volunteers, as categorised by their program.

Volunteers can only be in one program- tags and contact groups are available as alternatives.

To create a program, click on the  button.



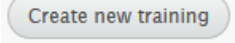
New Program *

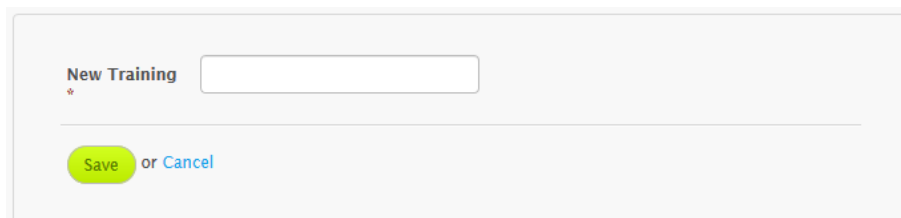
or

Type in the name of the program and click the  button.

Trainings

This section allows you to enter any additional training types for your organisation. Note that several default ones exist.

To add a new training type, click on the  button.

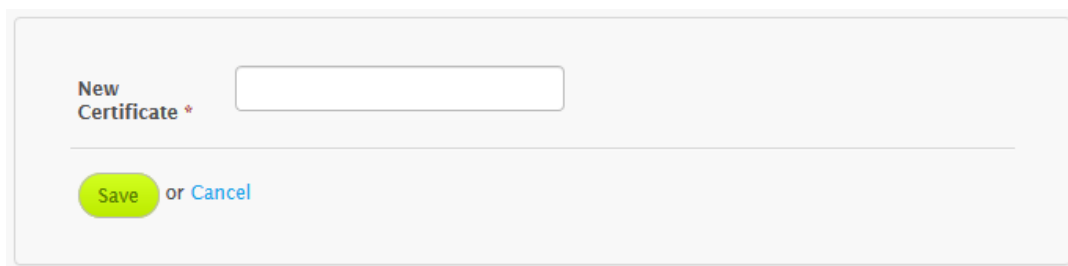
A form titled "New Training" with a red asterisk. It contains a text input field. Below the field are two buttons: a green "Save" button and a blue "Cancel" button.

Type in the name of the training and click the  button.

Certificates

This section allows you to enter any additional certificates for your organisation. Note that police check, working with children check, and first aid certificate are default types that cannot be edited.

To add a new certificate type, click on the  button.

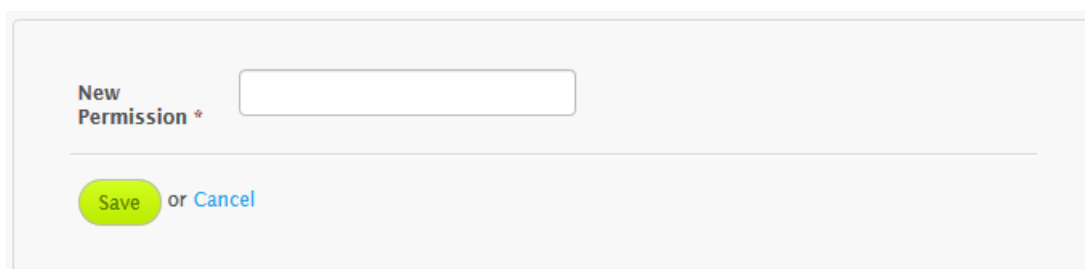
A form titled "New Certificate" with a red asterisk. It contains a text input field. Below the field are two buttons: a green "Save" button and a blue "Cancel" button.

Type in the name of the certificate and click the  button.

Permissions

This section allows you to enter any additional permissions for your organisation. Note that several default ones exist.

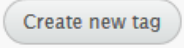
To add a new permission type, click on the  button.

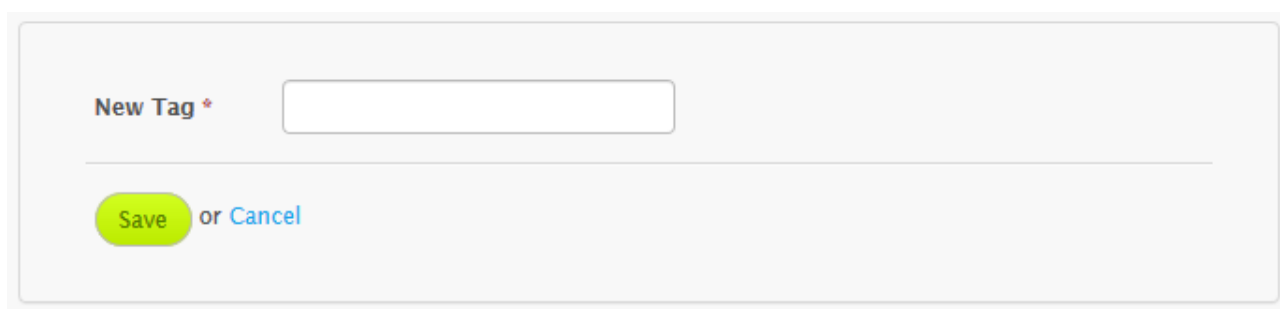
A form titled "New Permission" with a red asterisk. It contains a text input field. Below the field are two buttons: a green "Save" button and a blue "Cancel" button.


Type in the name of the certificate and click the  button.

Volunteer Tags

Tags can be used to match volunteers to volunteer positions. You can also use them as customisable interests or skills that apply only to your organisation. Reports can also be filtered by volunteer tag.

To add a new tag type, click on the  button.

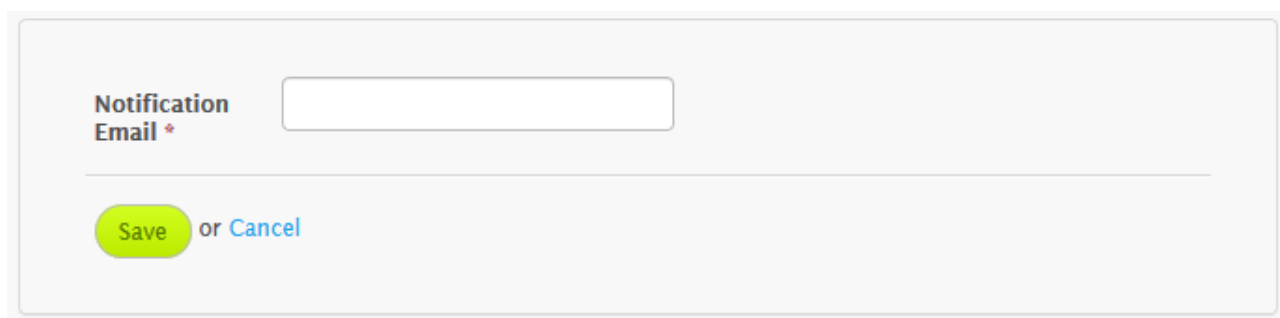


Type in the name of the tag and click the  button.

Notifications

This section allows you to set up weekly reports to be automatically generated and sent to specific email addresses. The report that is sent to these email addresses will list your active volunteers in VIRA who have certificates that are about to expire.

To add an email address to the list, click on the  button.



Type in the email address you want to receive updates and click the  button.

You can also delete email addresses listed here if at some point you no longer require these reports to go to one of the email addresses entered.

Bulk Hours Entry

If you have a large number of volunteers, you can use this section to quickly enter many records of volunteering.

Bulk Hours Entry - Agency Administration

This section allows you to quickly enter hours for many volunteers. Simply enter the details you want, and then select the volunteers you want to add this information to.

First, enter the date, number of hours, start time (optional) and comment/role (optional).

Position *

Date *

Start Time
 :

dd/mm/yyyy HH:mm (24-hour format)

Duration *

Role/Comment

Continue

Simply select the position and enter the details of the time volunteered then click on

Continue

Next, select the volunteer(s) you want to add hours records to. Each volunteer you select will have the above data added to their record.

Select Volunteer

This section displays volunteers that currently have hours logged on the selected day.

VOLUNTEERS WITH HOURS

No volunteers have been found.

0 volunteer(s) found.

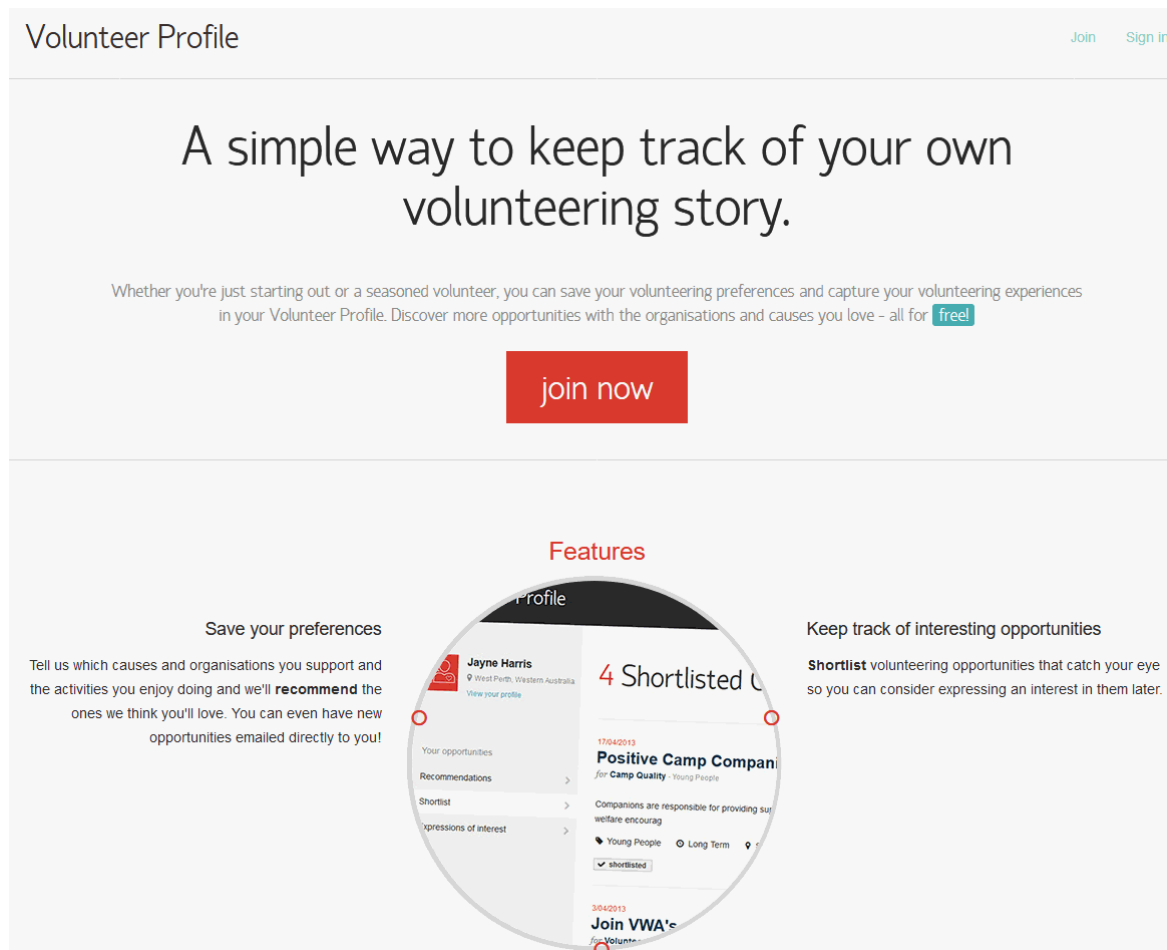
You can then select each volunteer that you want to add these hours to.

You'll see a summary of individuals that volunteered on that day below.

Volunteer Profile

If you'd like your volunteers to be able to update their own details, you can get them to sign up for a Volunteer Profile.

They can sign up for a Volunteer Profile by going to: <https://www.volunteer.org.au>



Once your volunteers have signed up for a Volunteer Profile they will be able to update their details themselves and any updates they make will automatically be updated in their volunteer record within VIRA.

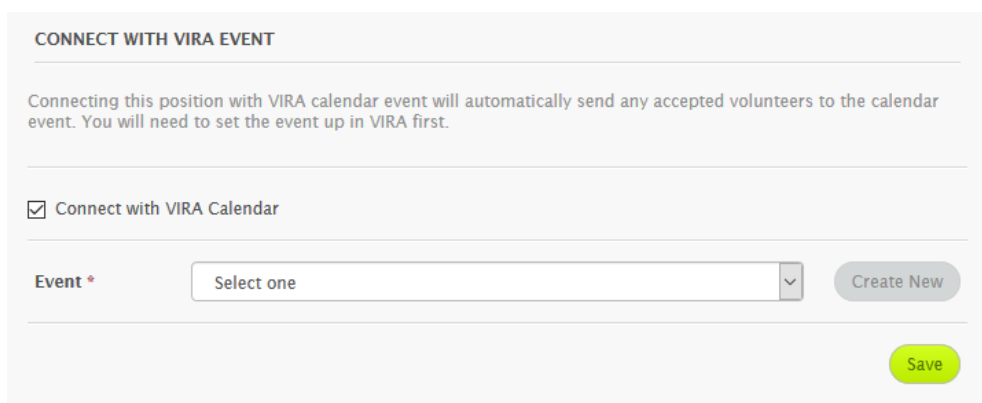
Your volunteers can also use their Volunteer Profile to enter any hours they have spent volunteering in any of the volunteer positions you have accepted them for. By doing this these hours will then be shown in their volunteer record as pending hours and also shown in the pending hours section of the pending tab. This means you can then go into VIRA and easily confirm the hours they have entered.

If a volunteer cannot see one of your roles in their profile, you may need to add it to their record. You can do this in the **History** section of their volunteer record by adding it via the **Positions** tab.

Do you use VIKTOR to list volunteer positions?

If you are using VIKTOR to list your volunteer positions, you will be able to link these positions to a VIRA calendar event.

If you open up the position in VIKTOR and then go to **Notifications** tab you will see there is a section titled **CONNECT WITH VIRA EVENT**.



If you check the box titled **Connect with VIRA Calendar** you will then be able to select an event from the drop down list that has been set up in your VIRA calendar. Once you have selected the event click on **Save**. Once you have done this, any volunteers who express interest for this position that you then accept will automatically be added to this event in the calendar in the **Volunteers Attending** section.

If you want to link positions to your Calendar events then it is best to make they have the same start date as the calendar event they relate to in VIRA.

Also note that as a VIRA user, you will see an additional **Access via a private link** option when selecting where you want volunteers to find a position in the **Advertisements** section of the **Basics** tab. If you select this option when creating your position, you will be given a private link to view the position that you can send directly to volunteers. This lets you create a role and send it to your volunteers without having it publicly visible.

Logging Off

Once you are finished, remember to log off the system by clicking on the **Logout** button in the top right hand corner. For security reasons you will be logged off after 60 minutes of inactivity.

VIRA Demo Site

If you want to experiment with VIRA and learn how to use the database without worrying about messing up yours or somebody else's data, you can use the demo site. To get access to the VIRA demo site you will need to get in touch with us via email at vira@vol.org.au

FREQUENTLY ASKED QUESTIONS

- **How do I change my password?**

There is a blue link labelled **Change password** in the upper right, next to the Logout button



- **What do I do if I forget my password?**

There is a blue link labelled **forgotten your password?** In the lower centre of the login screen. You can reset your password from there.

- **How many users can access VIRA?**

This depends on your account type- see table below

- **How many volunteers can I have in VIRA?**

This depends on your account type- see table below

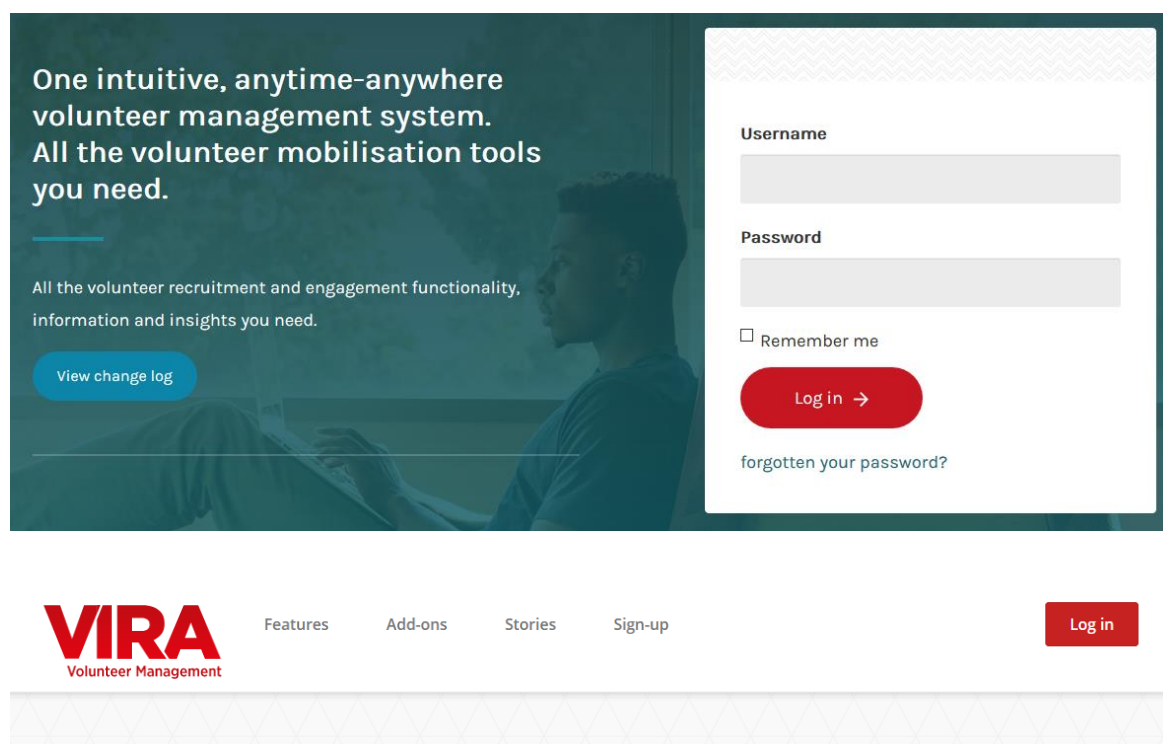
Level	Max User Logins	Volunteers
1	2	0-50
2	3	51-100
3	6	101-300
4	10	301-500
5	15	501-1000
6	20	1001-2000
7	25	2001-5000
8	30	5001+

Support

If you experience any problems with VIRA or have any queries about how to use the database please contact us at vira@vol.org.au

Updates and Mailouts

As we continue to make improvements to VIRA we will send out mailouts outlining any major changes. We may also send out surveys for member feedback from time to time. You can also view any changes via the [login screen](#) by clicking on the **View change log** button to the left of the login box.



What's new

September 2019 🔧 Enhancements

- Positions may have up to eight locations
- VIRA users may generate a private link for positions
- Volunteer language tab improved
- Position layout improved in volunteer email

September 2019 ★ New VIRA Features

- Preferred name added to VIRA
- Additional options added to recognition
- Option to remove a volunteer from all contact groups
- Event page can now create a contact list
- Sensitive issues alert
- Lock added to file notes
- Expiring Certificates report updated
- All reports include tag filter
- Outcome filter added to volunteer applications

Coming soon

- Mailer system overhaul

[Make a suggestion](#)