**Instructions – CI Department Request for Volunteers**

## ACCESS INSTRUCTIONS

There are 2 ways to access the SharePoint list:

**1 – SharePoint direct link:**

[USA-HPR-PersonnelSupportVolunteerDesk-Team – Department\_Assign\_Requests\_CI – Department Request (sharepoint.com)](https://jwsite.sharepoint.com/sites/USA-HPR-PersonnelSupportVolunteerDesk-Team/Lists/Department_Assign_Requests_CI/AllItems.aspx?viewid=daeb6772%2D2a0e%2D46f1%2Da873%2D7eebd7fa3a1c)

**2 – Through Teams:**

Link to tab: [Department\_Assign\_Requests\_CI](https://teams.microsoft.com/l/entity/26bc2873-6023-480c-a11b-76b66605ce8c/_djb2_msteams_prefix_201085382?context=%7B%22channelId%22%3A%2219%3AdIA3OQZgHNyKLmHWBwXeOIIo-dwP-sbcWWmqGn4I1Wo1%40thread.tacv2%22%7D&groupId=e108f241-3445-4b63-99cb-72fb825ae22f&tenantId=e9b2b7ba-b238-42a9-b271-2adfc82da650)

A screenshot of a computer

Description automatically generated

## PROCESSING INSTRUCTIONS

**All screenshots show the view from SharePoint direct link – Teams view may vary, but content is the same.**

### 1 - Create NEW Request:

A screenshot of a computer

Description automatically generated

Input form:

A screenshot of a computer

Description automatically generated

**Items highlighted in yellow are required fields to save the record.**

Additional fields needed for VD to process:

* Enrollment
* Skill Level
* Dept Start Date
* Dept End Date

The **NOTES** field can be used for specific notes for this request – will be visible to VD.

**DATA Synchronization:** to enable the request to synchronize with VD the following fields must be set to the options below:

**“VD Status” field:**

A screenshot of a computer

Description automatically generated

The above field is for the INITIAL Request only – updates will be picked up based on timestamps snd “Update VD” field.

**“Update VD” field:**

A screenshot of a computer

Description automatically generated

Defaults to “No”, to send request to VD change to “UPDATE VD”

When VD responds, status will change to “UPDATE DPT”

**“Test\_Data\_Flag”**

A screenshot of a computer

Description automatically generated

During testing phase, this field must be set to “Y” for data to transfer to VD. Will be removed once testing is complete.

### MONITORING / RESPONSE TO VD INSTRUCTIONS

SharePoint VIEWs available to assist with processing:

A screenshot of a computer

Description automatically generated

Three SharePoint Views have been created to assist with processing and monitoring:

**1 - Department Request**

View contains all fields needed to submit a new request to VD – the “NEW” button is tied to the fields in this view.

**2 - VIEW VD Prospects**

View is filtered to show only the records that have been returned from VD with a Prospect that needs to be approved.

**3 - ALL Volunteer Fields**

View shows ALL pertinent fields for a volunteer request, including Prospects and the FINAL Volunteer selected, as appropriate.

**PLEASE NOTE** for instructions to create MULITPLE records by copy/past, see instructions below in “NOTE – CREATING NEW RECORDS BY COPY/PASTE IN “EDIT GRID VIEW” MODE” section.

To EDIT ONE record in any View, click on the circle in the left column, then click “Edit” in the toolbar above:

A screenshot of a computer

Description automatically generated

To EDIT MULTIPLE records in any View, click on the circle in the left column, then click “Edit in grid view” in the toolbar above:

A screenshot of a computer

Description automatically generated

The list will then open in a grid view similar to Excel. You will have access to the DropDowns, etc in this view, as well as you can copy to cells etc.

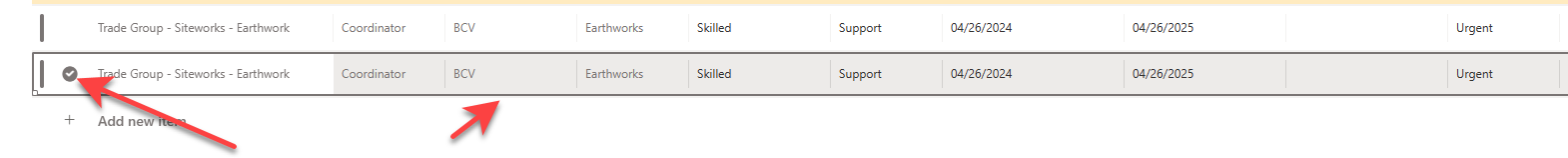
A screenshot of a computer

Description automatically generated

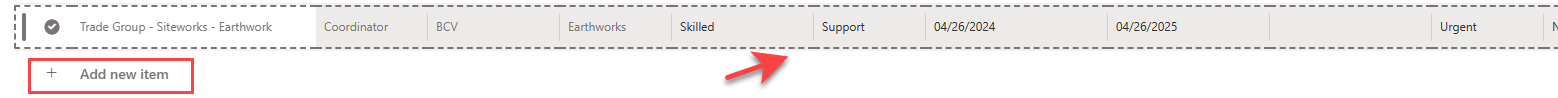
#### NOTE – CREATING NEW RECORDS BY COPY/PASTE IN “EDIT GRID VIEW” MODE:

It is possible to create new records in “Edit Grid View” by copying a previous record. Follow these steps after entering “Edit Grid View” mode:

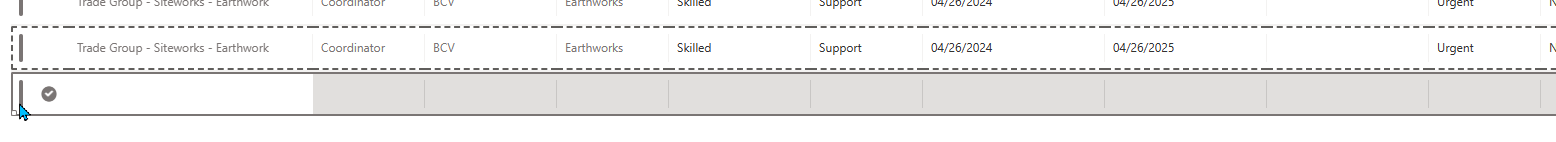
Click on the circle in the LEFT column, ensuring that the entire record is highlighted as below, with a thick black border:



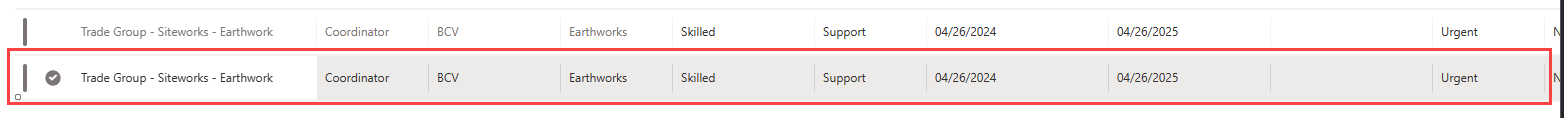
Press “Ctrl-C” to copy record. – the black border will change to dashes, this lets you know it has been copied (very similar to Excel)



Then click on “Add new Item” and click on the left side to ensure the entire record is highlighted:



Press “Ctrl-V” to copy and new record with same data will be saved:



Edit new record as necessary.