

Table of Contents

[Installation Guide 7](#_Toc132549004)

[Use System Installer 7](#_Toc132549005)

[Opening the Application 12](#_Toc132549006)

[Connecting the Database 13](#_Toc132549007)

[Uninstalling the Application 16](#_Toc132549008)

[General Information 19](#_Toc132549009)

[Control Functionality 19](#_Toc132549010)

[Checkbox 19](#_Toc132549011)

[Data Grid 19](#_Toc132549012)

[Date Picker 20](#_Toc132549013)

[Drop-down 22](#_Toc132549014)

[Radio Button 22](#_Toc132549015)

[Save File Dialog 24](#_Toc132549016)

[Searchable Drop-down 26](#_Toc132549017)

[Textbox 27](#_Toc132549018)

[Time Picker 28](#_Toc132549019)

[Toggle 31](#_Toc132549020)

[Development Account Login Information 32](#_Toc132549021)

[Refresh Icon 33](#_Toc132549022)

[Login Screen 35](#_Toc132549023)

[Log In 35](#_Toc132549024)

[Edit Database Settings 37](#_Toc132549025)

[Home 39](#_Toc132549026)

[Log Out 39](#_Toc132549027)

[Volunteers Tab 40](#_Toc132549028)

[General 40](#_Toc132549029)

[Page Summary 40](#_Toc132549030)

[Navigate to General Page 40](#_Toc132549031)

[Add Volunteer 41](#_Toc132549032)

[View Volunteer Information 43](#_Toc132549033)

[Edit Volunteer Information 44](#_Toc132549034)

[Demographics 46](#_Toc132549035)

[Page Summary 46](#_Toc132549036)

[Navigate to Demographics Page 46](#_Toc132549037)

[View Specific Volunteer Information 47](#_Toc132549038)

[Edit Volunteer Demographic Information 48](#_Toc132549039)

[Update Volunteer Name 50](#_Toc132549040)

[Set Volunteer Inactive 52](#_Toc132549041)

[Financials 56](#_Toc132549042)

[Page Summary 56](#_Toc132549043)

[Navigate to Financials Page 56](#_Toc132549044)

[Edit Volunteer Financial Information 57](#_Toc132549045)

[Change Date 60](#_Toc132549046)

[Classrooms 61](#_Toc132549047)

[Page Summary 61](#_Toc132549048)

[Navigate to Classrooms Page 61](#_Toc132549049)

[Add Classroom 62](#_Toc132549050)

[Edit Classroom 64](#_Toc132549051)

[Delete Classroom 66](#_Toc132549052)

[View Volunteer’s Classrooms 67](#_Toc132549053)

[View School’s Classrooms 67](#_Toc132549054)

[Export Classrooms 68](#_Toc132549055)

[Child Assignments 70](#_Toc132549056)

[Page Summary 70](#_Toc132549057)

[Navigate to Child Assignments Page 70](#_Toc132549058)

[Edit Student Assigned to Volunteer 71](#_Toc132549059)

[Assign Student to Volunteer 74](#_Toc132549060)

[Add Student Condition 76](#_Toc132549061)

[Add Student Need 79](#_Toc132549062)

[Remove Student from Volunteer 82](#_Toc132549063)

[View Volunteer’s Assigned Students 84](#_Toc132549064)

[View Volunteer’s Assigned Students in Specific Classroom 85](#_Toc132549065)

[Activity Log 86](#_Toc132549066)

[Page Summary 86](#_Toc132549067)

[Navigate to the Activity Log 86](#_Toc132549068)

[View Volunteer’s Activity Log 87](#_Toc132549069)

[View Log Entries within Specific Dates 88](#_Toc132549070)

[Add Log Entry 89](#_Toc132549071)

[Edit Log Entry 91](#_Toc132549072)

[Delete Log Entry 93](#_Toc132549073)

[Export Report to Excel 95](#_Toc132549074)

[Schools Tab 97](#_Toc132549075)

[All Schools 97](#_Toc132549076)

[Page Summary 97](#_Toc132549077)

[Navigate to the All Schools 97](#_Toc132549078)

[Add New School 98](#_Toc132549079)

[Edit Specific School 100](#_Toc132549080)

[Edit School Hours 103](#_Toc132549081)

[View Only Active Schools 106](#_Toc132549082)

[Export All Schools General Information to Excel 107](#_Toc132549083)

[Export All Cite Visitation Sheets to Word 108](#_Toc132549084)

[Export Specific School’s Cite Visitation Sheets to Word 109](#_Toc132549085)

[Per School 110](#_Toc132549086)

[Page Summary 110](#_Toc132549087)

[Navigate to Per School Page 110](#_Toc132549088)

[Edit Specific School 111](#_Toc132549089)

[Make School Inactive 114](#_Toc132549090)

[Edit School Times 116](#_Toc132549091)

[Delete School 118](#_Toc132549092)

[View Specific School Information 119](#_Toc132549093)

[Export Specific School Information 120](#_Toc132549094)

[Finance Tab 122](#_Toc132549095)

[General 122](#_Toc132549096)

[Page Summary 122](#_Toc132549097)

[Navigate to General Page 122](#_Toc132549098)

[View Specific Year’s Cost Share Data 123](#_Toc132549099)

[Edit Quarterly Cost Share Amount 126](#_Toc132549100)

[Delete Quarterly Cost Share Amount 128](#_Toc132549101)

[View Specific In-Kind Expense Type 129](#_Toc132549102)

[View In-Kind Expense Year Range 129](#_Toc132549103)

[View Type Year 129](#_Toc132549104)

[Filter By Donor 130](#_Toc132549105)

[Add New In-Kind Expense 131](#_Toc132549106)

[Edit In-Kind Expense 133](#_Toc132549107)

[Meal and Transport 135](#_Toc132549108)

[Page Summary 135](#_Toc132549109)

[Navigate to Meal and Transport Page 135](#_Toc132549110)

[View Specific Date’s Information 136](#_Toc132549111)

[View Specific Volunteer's Meal and Transportation Information 136](#_Toc132549112)

[Edit Meals and Transportation Information 137](#_Toc132549113)

[Export Meals and Transport Information to Excel 139](#_Toc132549114)

[PTO 141](#_Toc132549115)

[Page Summary 141](#_Toc132549116)

[Navigate to PTO Page 141](#_Toc132549117)

[View Specific Date’s PTO Information 142](#_Toc132549118)

[View Specific Volunteer PTO 143](#_Toc132549119)

[Edit Volunteer PTO Information 144](#_Toc132549120)

[Export PTO Information to Excel 146](#_Toc132549121)

[Fiscal Year 148](#_Toc132549122)

[Page Summary 148](#_Toc132549123)

[Navigate to Fiscal Year 148](#_Toc132549124)

[View Specific Year Range 149](#_Toc132549125)

[View Category Breakdown 150](#_Toc132549126)

[Export Category Breakdown 151](#_Toc132549127)

[View Specific Date in Category Breakdown 153](#_Toc132549128)

[Export Quarterly Fiscal Year Information 154](#_Toc132549129)

[Grant Year 155](#_Toc132549130)

[Page Summary 155](#_Toc132549131)

[Navigate to Grant Year Page 155](#_Toc132549132)

[View Specific Year Range 156](#_Toc132549133)

[View Category Breakdown 157](#_Toc132549134)

[Export Category Breakdown 158](#_Toc132549135)

[View Specific Date in Category Breakdown 160](#_Toc132549136)

[Export Quarterly Grant Year Information 161](#_Toc132549137)

[Reports Tab 162](#_Toc132549138)

[Report Builder 162](#_Toc132549139)

[Page Summary 162](#_Toc132549140)

[Navigate to Report Builder Page 162](#_Toc132549141)

[Build Custom Report 163](#_Toc132549142)

[Add Preset Report 167](#_Toc132549143)

[Use Preset Report 169](#_Toc132549144)

[Edit Preset Name 170](#_Toc132549145)

[Delete Preset 171](#_Toc132549146)

[Annual Check 172](#_Toc132549147)

[Page Summary 172](#_Toc132549148)

[Navigate to Annual Check Page 172](#_Toc132549149)

[View Current Volunteers 173](#_Toc132549150)

[View Volunteer’s Missing Documentation 173](#_Toc132549151)

[View Volunteer’s Check Information 174](#_Toc132549152)

[Volunteer Information 175](#_Toc132549153)

[Page Summary 175](#_Toc132549154)

[Navigate to Volunteer Information Page 175](#_Toc132549155)

[Edit Volunteer Information 176](#_Toc132549156)

[View Specific Volunteer 179](#_Toc132549157)

[View Volunteers Based on Status 180](#_Toc132549158)

[Export Volunteer Information to Excel 181](#_Toc132549159)

[Users Tab 183](#_Toc132549160)

[Users 183](#_Toc132549161)

[Page Summary 183](#_Toc132549162)

[Navigate to the User Tab 183](#_Toc132549163)

[Add New User 184](#_Toc132549164)

[Edit User Info 186](#_Toc132549165)

[Delete User 189](#_Toc132549166)

[Admin Tasks 190](#_Toc132549167)

[Page Summary 190](#_Toc132549168)

[Navigate to the Admin Tasks Tab 190](#_Toc132549169)

[Add Item to Category 191](#_Toc132549170)

[Add Temporary Information Field 192](#_Toc132549171)

[Delete Category Item 194](#_Toc132549172)

[Recover Deleted Volunteer 196](#_Toc132549173)

[Edit Student Needs 197](#_Toc132549174)

[Delete Student Needs 199](#_Toc132549175)

[Edit Student Conditions 200](#_Toc132549176)

[Delete Student Conditions 202](#_Toc132549177)

[Edit Rates 203](#_Toc132549178)

[Set Grant Year Stipend 204](#_Toc132549179)

[Delete All Students Assigned to Volunteers 205](#_Toc132549180)

# Installation Guide

## Use System Installer

1. Open the GEMWindowsInstaller Setup Wizard on the Windows computer you’d like to install the application.  
   Graphical user interface, application, Word

   Description automatically generated
2. Click the Next button to continue.   
   Graphical user interface, text, application, email

   Description automatically generated

**NOTE: Click the Back button to return to previous steps of the installer or cancel the installation with the Cancel button.**

Graphical user interface, text, application, email

Description automatically generated

1. Click the Browse button to select an installation location. By default the application is installed to <C:\Program Files\SVSU CS Capstone 2023\Grandparent Education Management System (GEM)\>.  
   Graphical user interface, text, application, email

   Description automatically generated
2. Click the Disk Cost button to ensure your computer has enough storage space for the application.  
   Graphical user interface, text, application, email

   Description automatically generated
3. Ensure that the required disk space is less than the available space.  
   Graphical user interface, text, application

   Description automatically generated
4. Choose to install the application for every profile computer, or just the user signed into the computer.

Graphical user interface, text, application, email

Description automatically generated

**Note: Check for a pop-up asking you to confirm the app can make changes to your device if the installation seems stuck on this screen.**

1. Click the Next button to start installing the application.  
   Graphical user interface, text, application, email

   Description automatically generated
2. Click the Close button to close the Setup Wizard when the installation is complete.  
   Graphical user interface, text, application, email

   Description automatically generated

## Opening the Application

1. Open the “C\_FGMS.UI” file, which has the Application filetype. It is in the destination folder you specified in the Setup Wizard.  
   Graphical user interface, text, application

   Description automatically generated

## Connecting the Database

1. If this is the first time the application is opened, you will be prompted to connect the database.  
   Graphical user interface, text, application

   Description automatically generated
2. Enter the database information.

Graphical user interface, text, application

Description automatically generated

**Note: GEM Database Information**

**Server Name: sql-read-01.saginawcounty.com**

**Database: FGMS\_Data**

**Username: COA-FGMS**

**Password: C0Mm1$sion@G3**

1. Click the Test Connection button to ensure the information is correct.  
     
   Graphical user interface, text, application

   Description automatically generated  
     
   .

**Note: A message will appear to let you know if the connection succeeded or failed.**

Graphical user interface, text, application

Description automatically generated

1. Click the Save button to continue, once the database connection is successful.  
   Graphical user interface, text, application

   Description automatically generated

# Uninstalling the Application

1. Open the Control Panel from your computer’s search bar.  
   A screenshot of a computer

   Description automatically generated with medium confidence
2. Click on “Uninstall a program”  
   Graphical user interface, text, application

   Description automatically generated
3. Choose the Grandparent Education Management System

Graphical user interface

Description automatically generated with medium confidence

1. Click the Uninstall button.

Graphical user interface, text

Description automatically generated

# General Information

## Control Functionality

### Checkbox



#### Select Checkbox

1. Click the box next to the label to select the value.



#### Deselect Checkbox

1. Click the box next to the label to deselect the value.



### Data Grid

A screenshot of a computer

Description automatically generated

#### Sort Data Grid

1. Click Title Label for category to sort by.

A screenshot of a computer

Description automatically generated

### Date Picker



#### Select Date

1. Click the Calendar icon.



1. Use the left and right arrows to scroll to the correct month for the date.

Calendar

Description automatically generated

1. Click the correct date number for the date.

Calendar

Description automatically generated

**Note: Type a time into the Time Picker to set the time without using the clock.**

Text

Description automatically generated with low confidence

#### Clear Date Picker

1. Click the Delete button.

Graphical user interface, diagram, application

Description automatically generated

### 

### Drop-down

Graphical user interface

Description automatically generated with medium confidence

#### Select Value

1. Click the Down arrow.

Graphical user interface

Description automatically generated with medium confidence

1. Select item from list of items.

Graphical user interface, application

Description automatically generated

### Radio Button



#### Select Radio Button

1. Click the circle next to the label to select the value.



#### Deselect Radio Button

1. Click the circle of a different radio button in the group of buttons.

Graphical user interface, application

Description automatically generated

### 

### Save File Dialog

Graphical user interface, application

Description automatically generated

#### Save File

1. Navigate to the location where you want to save the file.

Graphical user interface, text, application, email

Description automatically generated

1. Type in file name.

Graphical user interface, text, application

Description automatically generated

1. Click the Save button.

Graphical user interface, application

Description automatically generated

### 

### Searchable Drop-down

A picture containing graphical user interface

Description automatically generated

#### Select Item from Drop-down

1. Click the Down arrow.

A picture containing graphical user interface

Description automatically generated

1. Select item from list of items.

Graphical user interface

Description automatically generated with medium confidence

#### Search for Item in Drop-down

1. Click into the field.

A picture containing chart

Description automatically generated

1. Type in the value you’re searching for.

Shape, arrow

Description automatically generated

1. Click the Enter key to select value.

Word

Description automatically generated with medium confidence

#### Clear Selected Item

1. Click the Clear icon.

A picture containing graphical user interface

Description automatically generated

### Textbox

A picture containing text

Description automatically generated

#### Enter Text

1. Click into the field.



1. Type text into field.



### 

### Time Picker

Graphical user interface, text, application, chat or text message

Description automatically generated

#### Select Time

1. Click the Clock icon.

Graphical user interface, application

Description automatically generated

1. Select AM or PM.

A screenshot of a clock

Description automatically generated with medium confidence

1. Select the hour from the outer edge of the clock.

A screenshot of a clock

Description automatically generated with medium confidence

1. Click and drag the minute hand to the correct value.

A picture containing chart

Description automatically generated

1. Click the Confirm button.

A picture containing funnel chart

Description automatically generated

**Note: Type a time into the Time Picker to set the time without using the clock.**



### 

### Toggle



#### Enable Toggle

1. Click the Toggle switch.



#### Disable Toggle

1. Click the Toggle switch.



## 

## Development Account Login Information

The development account exists as a backup in the case that all existing administrative accounts are deleted from the system. It can be used to add an administrative account back into the system.

**Username**: svsu.developer@svsu.edu

**Password**: a,f=9o(myt$$4GWUob()@

## Refresh Icon

On any pages with a refresh icon visible, the icon can be clicked to reload the data from the database.

Chart, pie chart

Description automatically generated 1. Click the Refresh icon.

2. After a few seconds of loading, the data will refresh and present you with a success messageChart, pie chart

Description automatically generated.

**NOTE:**

**1) If at any point when using the system, you do not see the correct, most updated data you think you should be seeing, try refreshing first before anything else.**

**2) If at any point you select a row in a data grid and you want to un-select it, click the Refresh icon.**

A picture containing table

Description automatically generated

A screenshot of a computer

Description automatically generated with medium confidence

# Login Screen

## Log In

**Note: If it is the first time you are opening the program, you will see a popup saying you need to configure your database setup. If you see this, please reference the installer guide on page 13 to configure your database.**

*Graphical user interface, text, application

Description automatically generated*

1. Enter in your email and password credentials, once the database is correctly configured.

Graphical user interface, text, application

Description automatically generated

1. Click Login.

Graphical user interface, text, application

Description automatically generated

## 

## Edit Database Settings

* 1. Graphical user interface, text, application

     Description automatically generatedClick the Database Settings button.
  2. Update the editable information.

Graphical user interface, text, application

Description automatically generated

1. Click the Test Connection icon.

Graphical user interface, text, application

Description automatically generated

1. Click the Save icon after testing the database connection.

Graphical user interface, text, application

Description automatically generated

# Home

## Log Out

1. Click the Log Out icon.

Chart

Description automatically generated

# Volunteers Tab

## General

### Page Summary

This General Tab allows you to view, edit, add, or delete active and inactive volunteer’s data.

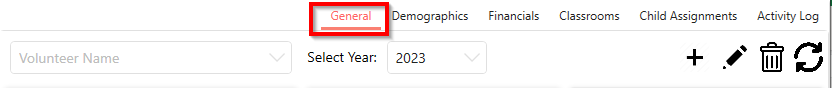
### Navigate to General Page

1. Click on the Volunteers Tab

A picture containing graphical user interface

Description automatically generated

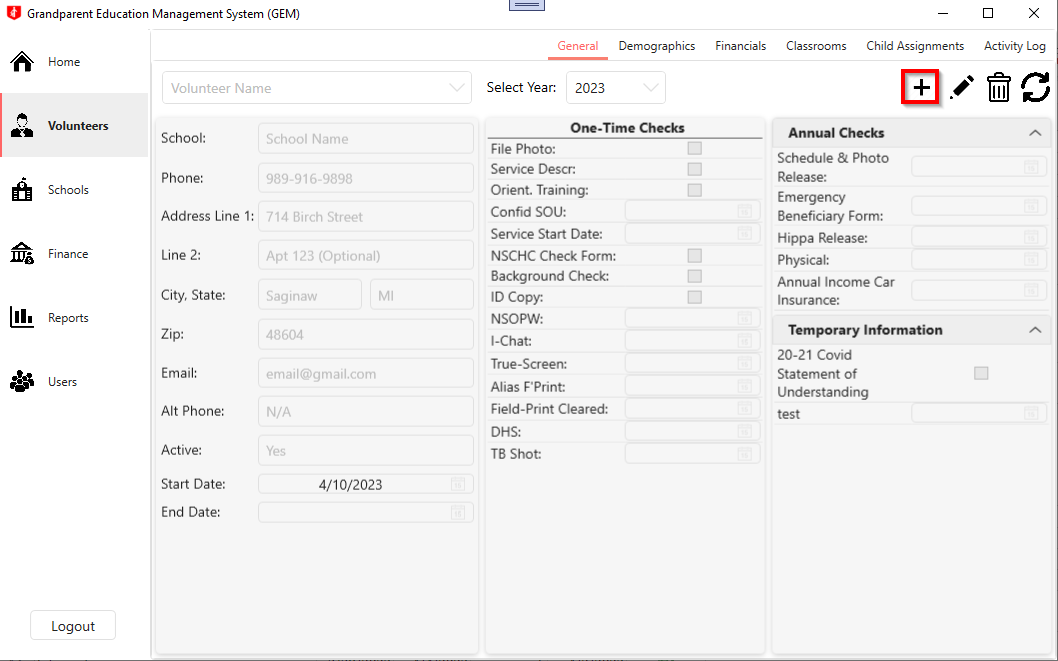
1. Click the General Tab.



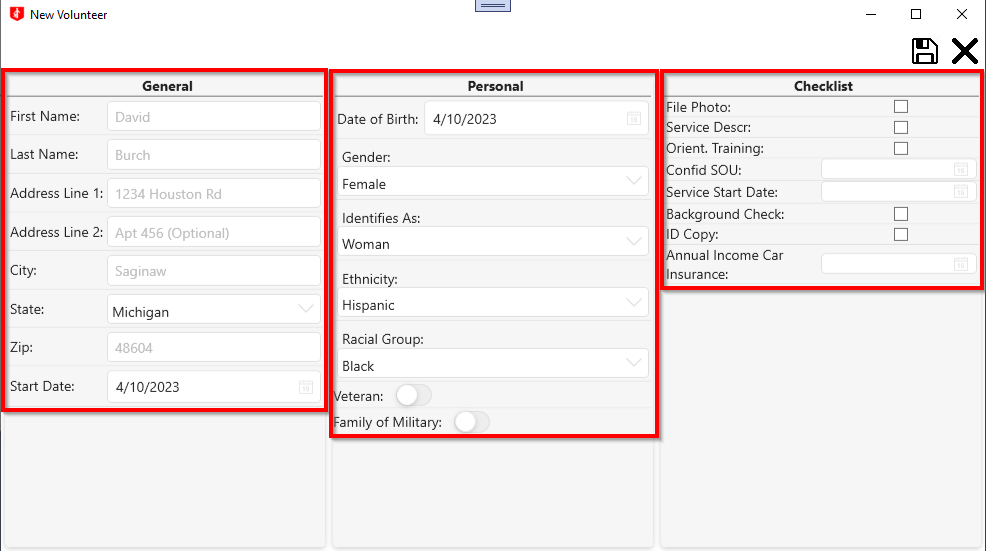
### 

### Add Volunteer

1. Click the Add icon to add a volunteer.



1. Enter all the volunteer’s information. All enterable fields are marked below.



1. Click the Save icon to save your changes.

Graphical user interface, application, table

Description automatically generated

**Note: Click the Cancel icon to discard the changes and exit edit mode.**

Graphical user interface, application, table

Description automatically generated

**Click the Confirm Icon to** **discard the changes and exit edit mode.**

Graphical user interface, text, application

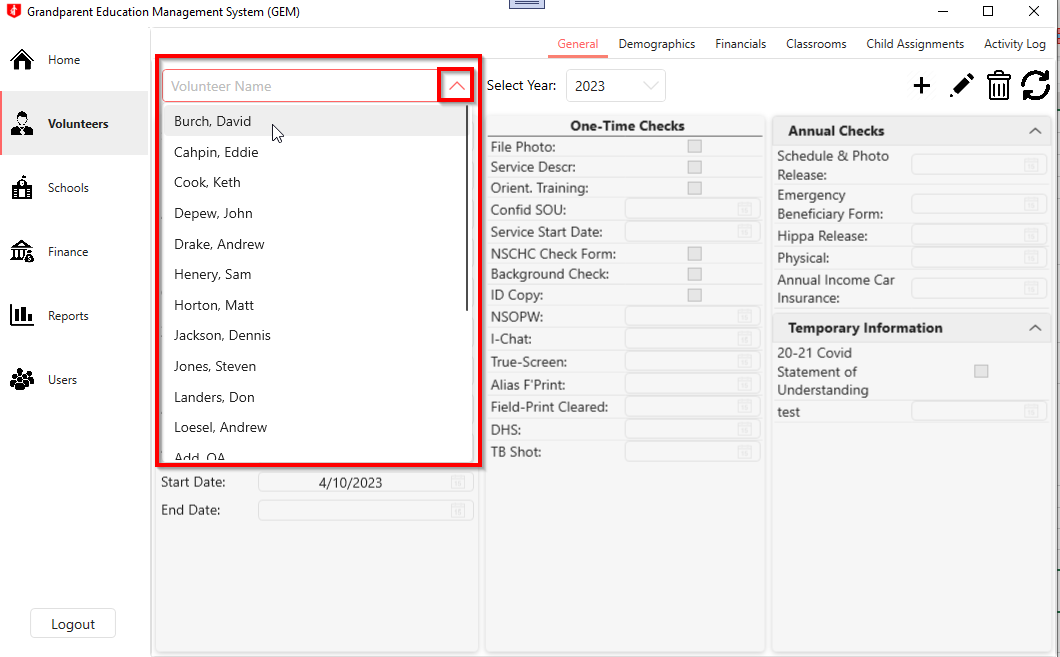
Description automatically generated

**Click the Cancel Icon to prevent the changes from being deleted.**Graphical user interface, text

Description automatically generated

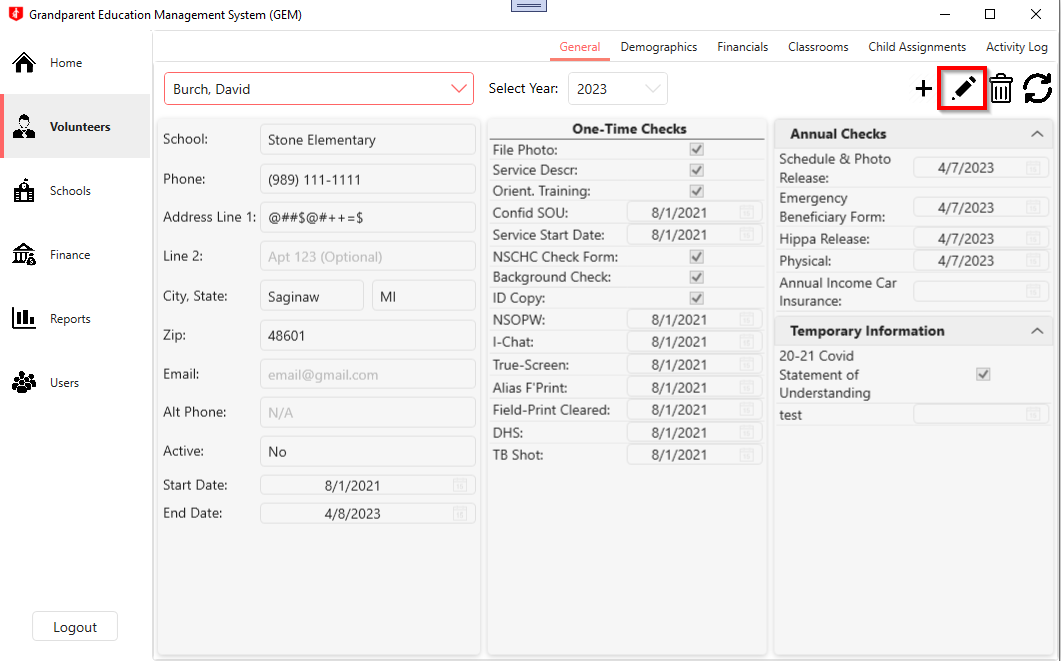
### View Volunteer Information

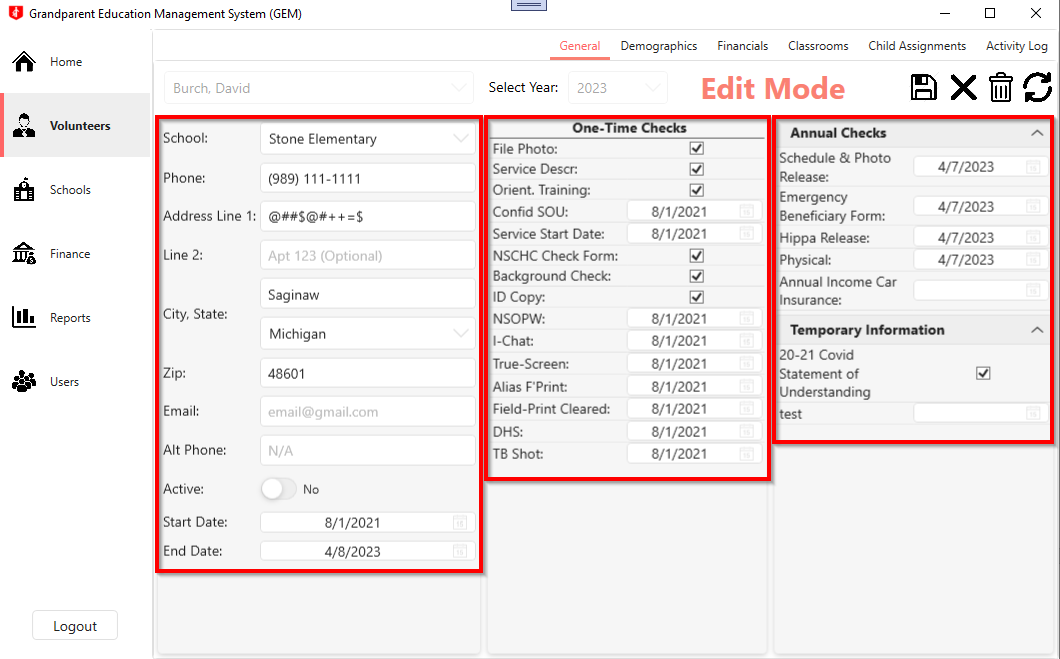
1. Select a volunteer’s name from the Volunteers drop-down to view their information.



### Edit Volunteer Information

1. Click the Edit icon to update the volunteer’s information.



1. Update any of the editable fields outlined below. 
2. Click the Save icon to persist your changes.

**Note: Click the Cancel icon to discard the changes and exit edit mode.**



**Click the Confirm Icon to** **discard the changes and exit edit mode.**

Graphical user interface, text, application

Description automatically generated

**Click the Cancel Icon to prevent the changes from being delete.** Graphical user interface, text

Description automatically generated

## 

## Demographics

### Page Summary

This page allows you to view or edit an active or inactive volunteer’s demographic information.

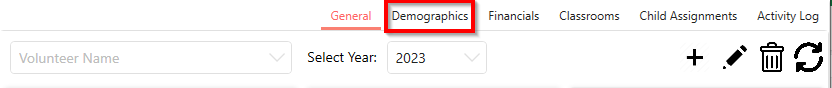
### Navigate to Demographics Page

1. Click the Volunteers Tab

A picture containing graphical user interface

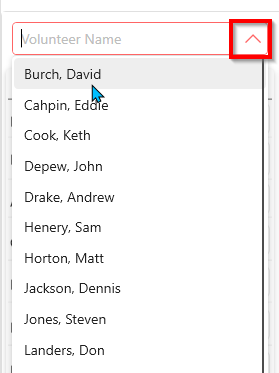
Description automatically generated

1. Click the Demographics Tab



### View Specific Volunteer Information

1. Select a volunteer whose demographics you’d like to view.

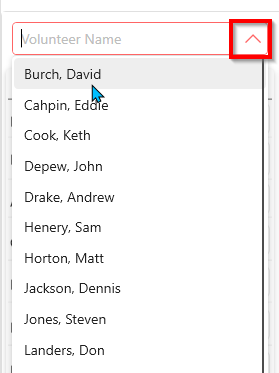


### 

### 

### Edit Volunteer Demographic Information

1. Select the volunteer whose demographics you’d like to edit.



1. Click the Edit icon.

Graphical user interface, text, application, Word

Description automatically generated

1. Update any of the editable fields outlined below.

Graphical user interface, application

Description automatically generated

1. Click the Save icon to persist the edits made to the volunteer’s demographic information.



**Note: Click the Cancel icon to discard the changes and exit edit mode.**

Graphical user interface, application

Description automatically generated

**Click the Confirm Icon to** **discard the changes and exit edit mode.**

Graphical user interface, text, application

Description automatically generated

**Click the Cancel Icon to prevent the changes from being delete.**

Graphical user interface, text

Description automatically generated

### 

### Update Volunteer Name

1. Select the volunteer whose demographics you’d like to edit.

Graphical user interface, text, application

Description automatically generated

1. Click the Edit icon.

Graphical user interface, text, application, Word

Description automatically generated

1. Click Down icon.

Graphical user interface, text, application

Description automatically generated

1. Update editable fields.

Graphical user interface, application

Description automatically generated

1. Click Save icon.

Graphical user interface, application

Description automatically generated

**Note: Click the Cancel icon to discard the changes and exit edit mode.**

Graphical user interface, application

Description automatically generated

**Click the Confirm Icon to** **discard the changes and exit edit mode.**

Graphical user interface, text, application

Description automatically generated

**Click the Cancel Icon to prevent the changes from being delete.**

Graphical user interface, text

Description automatically generated

### Set Volunteer Inactive

1. Select the volunteer to edit.

Graphical user interface, text, application

Description automatically generated

1. Click the Edit icon.

Graphical user interface, application

Description automatically generated

1. Click the Status toggle to set the volunteer inactive.

Graphical user interface, application

Description automatically generated

1. Set the Separation Date. By default, this will be set to the current date.

Graphical user interface, text, application

Description automatically generated

1. Select the volunteer’s separation reason from the Reason drop-down.

Graphical user interface, text, application

Description automatically generated

1. Click Save icon.

Graphical user interface, application

Description automatically generated

**Note: Click the Cancel icon to discard the changes and exit edit mode.**

Graphical user interface, application

Description automatically generated

**Click the Confirm Icon to** **discard the changes and exit edit mode.**

Graphical user interface, text, application

Description automatically generated

**Click the Cancel Icon to prevent the changes from being delete.**

Graphical user interface, text

Description automatically generated

### 

## Financials

### Page Summary

This page allows you to view and edit a specific volunteer’s hours, PTO & stipends, and meal and transportation data for a specific month and year.

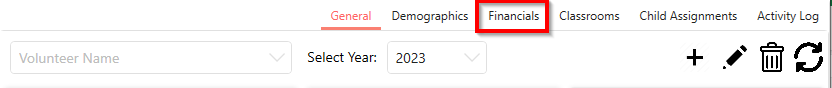
### Navigate to Financials Page

1. Click the Volunteers Tab.

A picture containing graphical user interface

Description automatically generated

1. Click the Financials Tab.



### Edit Volunteer Financial Information

1. Select a volunteer from the Volunteer Name drop-down.

Graphical user interface, table

Description automatically generated

1. Click the Edit icon to update information.

Graphical user interface, application

Description automatically generated

1. Update the editable information.

Graphical user interface, application

Description automatically generated

**NOTE: Click the PTO Eligibility toggle to change a volunteer’s pto eligibility.**

Graphical user interface

Description automatically generated

1. Click the Save icon when doneGraphical user interface, application

   Description automatically generated

**Note: Click the Cancel icon to discard the changes and exit edit mode.**

Graphical user interface, application

Description automatically generated

**Click the Yes button to** **discard the changes and exit edit mode.**

Graphical user interface, application

Description automatically generated

**Click the No button to prevent the changes from being delete.**  Graphical user interface, application

Description automatically generated

### Change Date

1. Select the year from the Year drop-down.

Graphical user interface, application

Description automatically generated

1. Select the month from the Month drop-down.

Graphical user interface, application, table

Description automatically generated

## Classrooms

### Page Summary

This page allows you to add, edit, delete, and export classrooms as well as view specific volunteer’s classrooms and specific schools’ classrooms.

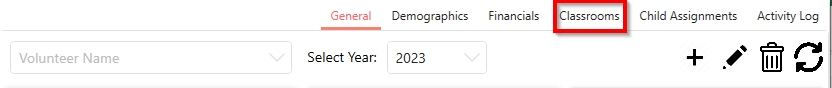
### Navigate to Classrooms Page

1. Click the Volunteers Tab.

A picture containing graphical user interface

Description automatically generated

1. Click the Classrooms Tab.



### 

### Add Classroom

1. Click Add icon.

Graphical user interface, application

Description automatically generated

1. Fill out all the classroom information. All required fields are outlined below.

Graphical user interface, text, application

Description automatically generated

1. Click Save icon.

Graphical user interface, application

Description automatically generated

**Note: Click the Cancel icon to discard the changes and exit add mode.**

Graphical user interface, application

Description automatically generated

**Click the Yes button to** **discard the changes and exit add mode.**

Graphical user interface, application

Description automatically generated

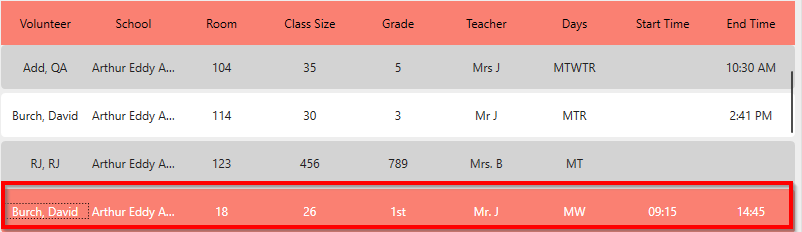
**Click the No button to prevent the changes from being delete.**

Graphical user interface, application

Description automatically generated

### Edit Classroom

1. Select entry to edit.



1. Click Edit icon.

Graphical user interface

Description automatically generated with medium confidence

1. Update any of the editable fields outlined below.

Graphical user interface

Description automatically generated

**Note: Click the Edit Time toggle and then enter the new times to update the Start Time and End Time.**  Graphical user interface

Description automatically generated with low confidence

1. Click Save icon.

Graphical user interface, application

Description automatically generated

**Note: Click the Cancel icon to discard the changes and exit edit mode.**

Graphical user interface, application

Description automatically generated

**Click the Yes button to** **discard the changes and exit edit mode.**

Graphical user interface, application

Description automatically generated

**Click the No button to prevent the changes from being delete.**

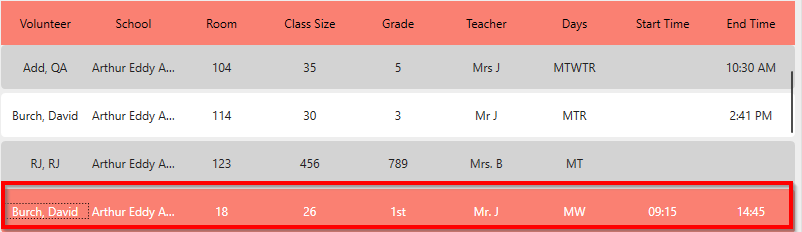
Graphical user interface, application

Description automatically generated

### 

### Delete Classroom

1. Select entry to delete.



1. Click the Delete icon.

Diagram

Description automatically generated

1. Click the Yes icon.

Graphical user interface, application

Description automatically generated

**Note: Click the No icon to prevent the entry from being deleted.**

Graphical user interface, text, application

Description automatically generated

### View Volunteer’s Classrooms

1. Select a Volunteer from the drop-down.

Text

Description automatically generated with medium confidence

### View School’s Classrooms

1. Select a School from the drop-down.

Graphical user interface, application

Description automatically generated

### 

### Export Classrooms

1. Select the Volunteer to export logs from a specific person. If not logs for all volunteers will be exported.

Graphical user interface, application

Description automatically generated

1. Select the School Name to export logs from a specific school. If not logs for all schools will be exported.

Graphical user interface, application

Description automatically generated with medium confidence

1. Click Export icon.

Diagram

Description automatically generated

1. Click Save icon.

Graphical user interface, text, application, email

Description automatically generated

**Note: Click the Cancel icon to discard the report.**

Graphical user interface, text, application, email

Description automatically generated

## Child Assignments

### Page Summary

This page allows you to add new students to a volunteer, edit existing students and delete students from a volunteer. This page also displays the classroom size, number of kids assigned, the kids grade level and the age breakdown of the students.

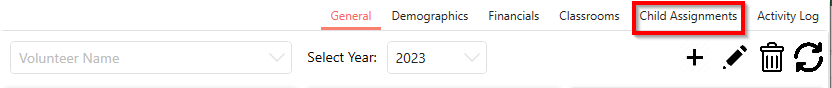
### Navigate to Child Assignments Page

1. Click the Volunteers Tab

A picture containing graphical user interface

Description automatically generated

1. Click the Child Assignments Tab



### Edit Student Assigned to Volunteer

1. Select the volunteer from the Volunteer Name drop-down whose student assignment you want to edit.

Graphical user interface

Description automatically generated with medium confidence

1. Select the student’s room number from the Room Number drop-down.

Graphical user interface, text, application, PowerPoint

Description automatically generated

1. Select the student you want to edit.

Table, funnel chart

Description automatically generated

1. Click the Edit icon.

A picture containing diagram

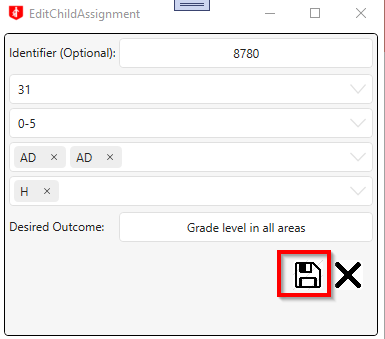
Description automatically generated

1. Update the editable information outline below.

Graphical user interface, text, application, email

Description automatically generated

1. Click the Save icon.



**Note: Click the Cancel icon to discard the changes and exit edit mode.**

Graphical user interface, text, application, email

Description automatically generated

**Click the Yes button to** **discard the changes and exit edit mode.**

Graphical user interface, application

Description automatically generated

**Click the No button to prevent the changes from being delete.**

Graphical user interface, application

Description automatically generated

### Assign Student to Volunteer

1. Click the Add icon.

A picture containing graphical user interface

Description automatically generated

1. Fill out all the student’s information. All required fields are outlined below.

Graphical user interface, text, application, email

Description automatically generated

**NOTE: The Identifier is optional and will be automatically generated if nothing is entered.**

Graphical user interface, text, application, email

Description automatically generated

1. Click the Save icon to assign the student to the currently selected volunteer.

Graphical user interface, application

Description automatically generated with medium confidence

**Note: Click the Cancel icon to discard the changes and exit add mode.**

Graphical user interface, text, application, email

Description automatically generated

**Click the Yes button to** **discard the changes and exit add mode.**

Graphical user interface, application

Description automatically generated

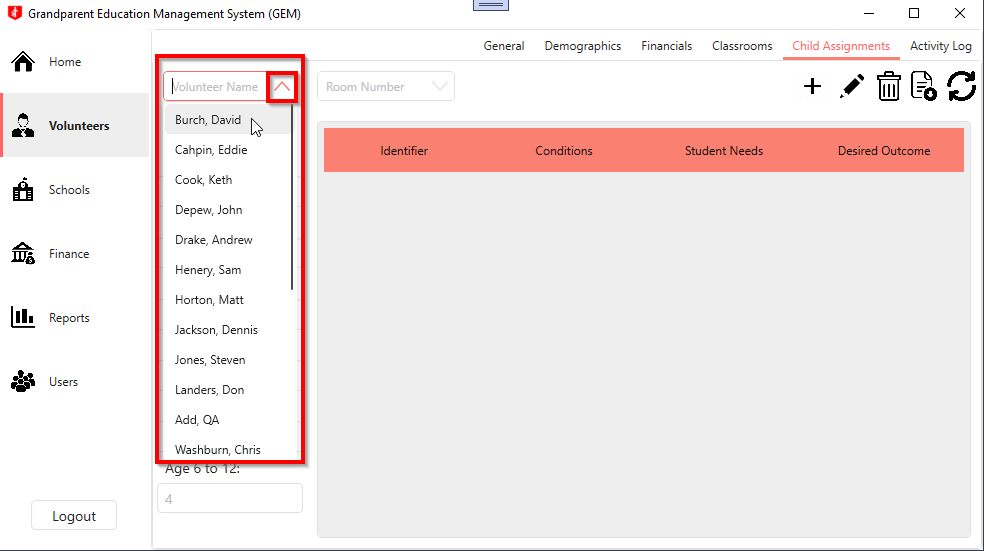
**Click the No button to prevent the changes from being delete.**

Graphical user interface, application

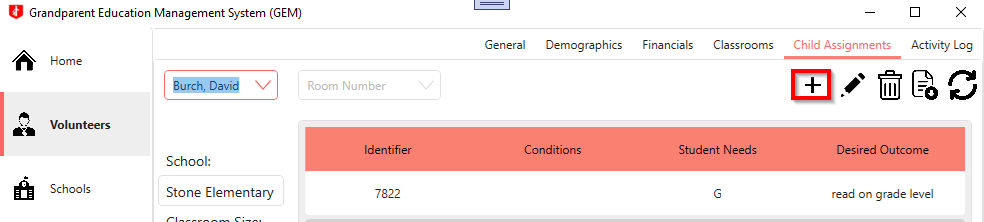
Description automatically generated

### Add Student Condition

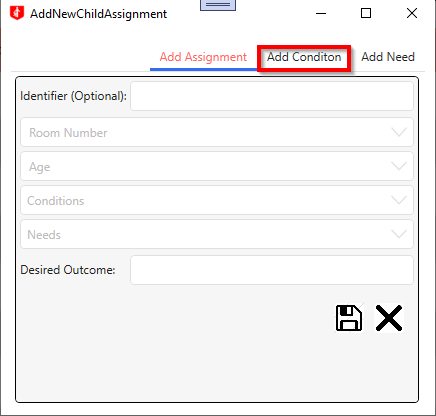
1. Select volunteer from the Volunteer Name drop-down.



1. Click the Add icon.



1. Click the Add Condition tab.



1. Fill out the Condition and Abbreviation text boxes.

Graphical user interface, application

Description automatically generated

1. Click the Save icon.

Graphical user interface, application

Description automatically generated

**Note: Click the Cancel icon to discard the changes and exit add mode.**

Graphical user interface, application

Description automatically generated

**Click the Yes button to** **discard the changes and exit add mode.**

Graphical user interface, application

Description automatically generated

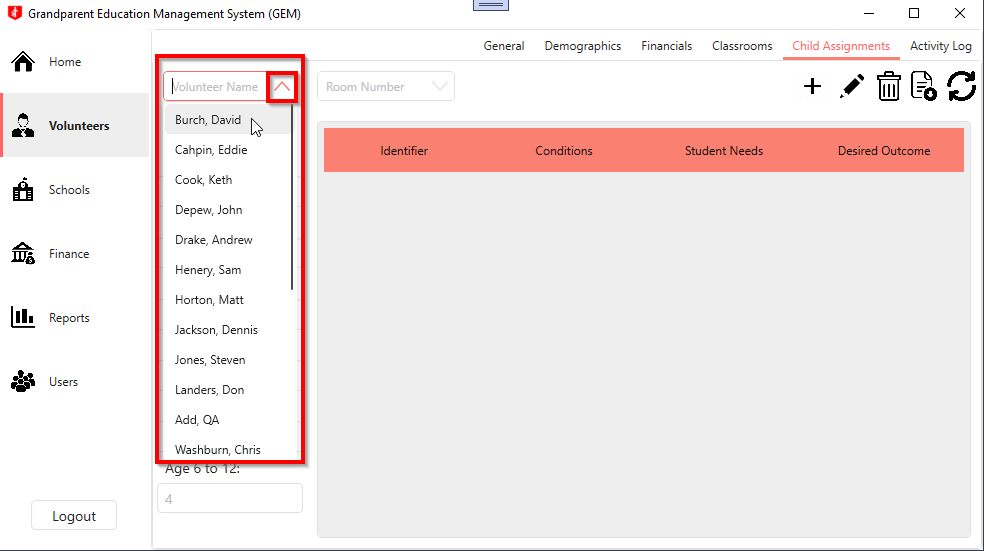
**Click the No button to prevent the changes from being delete.**

Graphical user interface, application

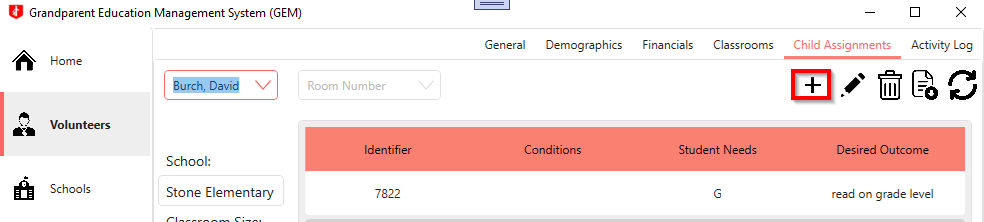
Description automatically generated

### Add Student Need

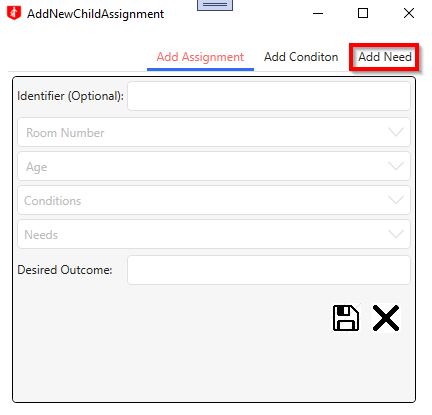
1. Select volunteer from the Volunteer Name drop-down.



1. Click the Add icon.



1. Click the Add Need tab.



1. Fill out the Need and Abbreviation text boxes.

Graphical user interface, text, application, email

Description automatically generated

1. Click the save icon.

Graphical user interface, text, application, email

Description automatically generated

**Note: Click the Cancel icon to discard the changes and exit add mode.**

Graphical user interface, text, application, email

Description automatically generated

**Click the Yes button to** **discard the changes and exit add mode.**

Graphical user interface, application

Description automatically generated

**Click the No button to prevent the changes from being delete.**

Graphical user interface, application

Description automatically generated

### Remove Student from Volunteer

1. Select the volunteer from the Volunteer Name drop-down whose student assignment you want to edit.

Graphical user interface

Description automatically generated with medium confidence

1. Select the student’s room number from the Room Number drop-down.

Graphical user interface, text, application, PowerPoint

Description automatically generated

1. Select the student you want to remove.

Table

Description automatically generated

1. Click the delete icon.

A picture containing table

Description automatically generated

1. Click the yes icon to confirm the delete.

Graphical user interface, application

Description automatically generated

**NOTE: Click the No icon to prevent the entry from being deleted.**

Graphical user interface, application

Description automatically generated

### View Volunteer’s Assigned Students

1. Select a volunteer from the Volunteer drop-down

Graphical user interface, application, PowerPoint

Description automatically generated

### View Volunteer’s Assigned Students in Specific Classroom

1. Select a volunteer from the Volunteer drop-down.

Graphical user interface, application, PowerPoint

Description automatically generated

1. Select a room number from the Room Number drop-down.

Graphical user interface, application

Description automatically generated

## Activity Log

### Page Summary

This page allows you to view a volunteer’s activity log, add a new entry to a log, delete an entry from a log and export activity log entries to Excel. There are two date fields that can be used to specify a date range to pull activity log entries from. The Select Volunteer drop-down allows you to select a volunteer to view entries specific to that volunteer. The date fields and Select Volunteer drop-down can be used together to view entries from a specific volunteer within a certain date range.

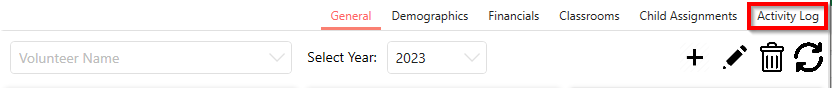
### Navigate to the Activity Log

1. Click the Volunteers Tab.

A picture containing text

Description automatically generated

1. Click the Activity Log Tab.



### View Volunteer’s Activity Log

1. Select the volunteer from the Select Volunteer drop-down to view the volunteer’s activity log.

Graphical user interface, application

Description automatically generated

### View Log Entries within Specific Dates

1. Enter a start date in the Start Date textbox. By default, this date is set to the first day of the current year.

Graphical user interface, application

Description automatically generated

1. Enter an end date in the End Date textbox. By default, this date is set to the last day of the current year.

Graphical user interface, application

Description automatically generated

### Add Log Entry

1. Click the volunteer from the Select Volunteer drop-down.

Graphical user interface, application

Description automatically generated

1. Click the Add icon.

Graphical user interface, application

Description automatically generated

1. Fill out the entry information. The required fields are outlined below.

Graphical user interface, text, application, email

Description automatically generated

1. Click the Save icon.

Graphical user interface, text, application, email

Description automatically generated

**Note: Click the Cancel icon to discard the changes and exit add mode.**

Graphical user interface, text, application, email

Description automatically generated

**Click the Yes button to** **discard the changes and exit add mode.**

Graphical user interface, application

Description automatically generated

**Click the No button to prevent the changes from being delete.**  Graphical user interface, application

Description automatically generated

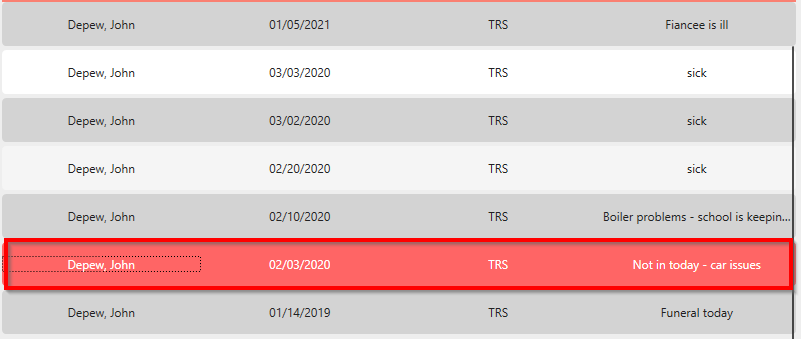
### Edit Log Entry

1. Select the volunteer from the Select Volunteer drop-down.

Graphical user interface, application

Description automatically generated

1. Click the log entry to be edited.



1. Click the Edit icon.

A picture containing diagram

Description automatically generated

1. Update any of the editable fields outlined below.

Graphical user interface, text, application, email

Description automatically generated

1. Click the Save icon.

Graphical user interface, text, application, email

Description automatically generated

**Note: Click the Cancel icon to discard the changes and exit edit mode.**

Graphical user interface, text, application, email

Description automatically generated

**Click the Yes button to** **discard the changes and exit edit mode.**

Graphical user interface, application

Description automatically generated

**Click the No button to prevent the changes from being delete.**  Graphical user interface, application

Description automatically generated

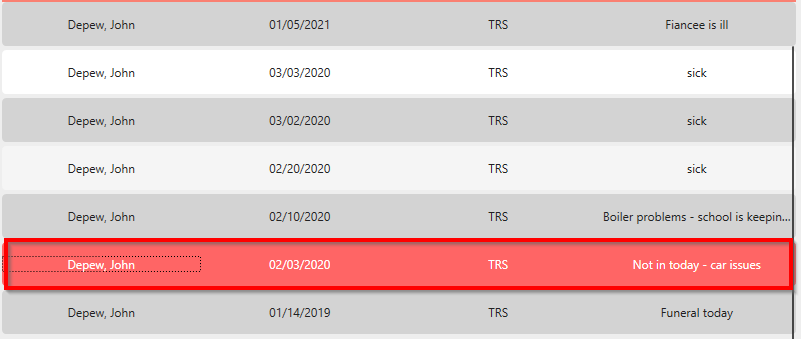
### Delete Log Entry

1. Select the Volunteer to delete a log from.

Graphical user interface, application

Description automatically generated

1. Select the log entry to delete.



1. Click the Delete icon.

Diagram

Description automatically generated with low confidence

1. Click the Yes icon on the confirmation to delete the entry.

Graphical user interface, application

Description automatically generated

**Note: Click No icon to prevent the entry from being deleted.**

Graphical user interface, text, application, email

Description automatically generated

### Export Report to Excel

1. Select a Volunteer to export their activity logs to Microsoft Excel. If you do not select a specific volunteer, the activity logs for all the volunteers will be exported to Microsoft Excel.

Graphical user interface, application

Description automatically generated

1. Enter a start date in the Start Date textbox.

Graphical user interface, text

Description automatically generated with medium confidence

1. Enter an end date in the End Date textbox.

A picture containing text

Description automatically generated

1. Click the Export icon.

Diagram

Description automatically generated with medium confidence

1. Click Save icon.

Graphical user interface, text, application

Description automatically generated

**Note: Click the Cancel icon to discard the report.**

Graphical user interface, text, application

Description automatically generated

# Schools Tab

## All Schools

### Page Summary

This page allows you to see a list of all the schools in the program with information like the principal's name, the school's phone number, the active status of the school and a breakdown of the number of students and age ranges for each school. You can also add a new school and export site visitation sheets for all schools on this screen.

### Navigate to the All Schools

1. Click the Schools Tab.

A picture containing text

Description automatically generated

1. Click the All Schools Tab

A picture containing diagram

Description automatically generated

### Add New School

1. Click the Add icon to add a new school.

A picture containing application

Description automatically generated

1. Enter the school’s information. All required fields are outlined below.

Graphical user interface, application

Description automatically generated

1. Click the Save icon.

Diagram

Description automatically generated

**Note: Click the Cancel icon to discard the changes and exit add mode.**

Graphical user interface, application

Description automatically generated

**Click the Yes button to** **discard the changes and exit add mode.**

Graphical user interface, application

Description automatically generated

**Click the No button to prevent the changes from being delete.**  Graphical user interface, application

Description automatically generated

### Edit Specific School

1. Select the school to edit.

Graphical user interface

Description automatically generated with medium confidence

1. Click Edit icon.

Graphical user interface, application

Description automatically generated

1. Update any of the editable fields outlined below.

Graphical user interface

Description automatically generated

1. Click the Save icon.

A picture containing application

Description automatically generated

**Note: Click the Cancel icon to discard the changes and exit add mode.**

Graphical user interface, application

Description automatically generated

**Click the Yes button to** **discard the changes and exit add mode.**

Graphical user interface, application

Description automatically generated

**Click the No button to prevent the changes from being delete.**  Graphical user interface, application

Description automatically generated

### Edit School Hours

1. Select the school to edit.

Graphical user interface

Description automatically generated with medium confidence

1. Click Edit icon.

Graphical user interface

Description automatically generated

1. Click Edit Time toggle.

Graphical user interface

Description automatically generated

1. Update Start Time.

Graphical user interface

Description automatically generated with medium confidence

1. Update End Time.

Graphical user interface, application

Description automatically generated

1. Click Save icon.

Graphical user interface, text, application, chat or text message

Description automatically generated

1. Click Save icon.

A picture containing application

Description automatically generated

**Note: Click the Cancel icon to discard the changes and exit add mode.**

Graphical user interface, application

Description automatically generated

**Click the Yes button to** **discard the changes and exit add mode.**

Graphical user interface, application

Description automatically generated

**Click the No button to prevent the changes from being delete.**  Graphical user interface, application

Description automatically generated

### View Only Active Schools

1. Click the Active Schools checkbox.

Diagram

Description automatically generated

### Export All Schools General Information to Excel

1. Click the Export icon.

Graphical user interface, application

Description automatically generated

1. Click Save icon.

Graphical user interface, text, application

Description automatically generated

**Note: Click the Cancel icon to discard the report.**

Graphical user interface, text, application, email

Description automatically generated

### Export All Cite Visitation Sheets to Word

1. Click the Export icon.

Graphical user interface, diagram, application

Description automatically generated

### Export Specific School’s Cite Visitation Sheets to Word

1. Select the school to export visitation sheet for.

A picture containing graphical user interface

Description automatically generated

1. Click the Export icon.

Graphical user interface, diagram, application

Description automatically generated

## Per School

### Page Summary

This page allows you to view the information for a specific school as well as the volunteers that are assigned to the school. On this page, the school’s information can also be edited and the site visitation sheet for the specific school can be exported.

### Navigate to Per School Page

1. Click the Schools Tab.

A picture containing text

Description automatically generated

1. Click Per School Tab.

A picture containing graphical user interface

Description automatically generated

### Edit Specific School

1. Select the school to edit from the Select School drop-down.

Graphical user interface, application

Description automatically generated

1. Click Edit icon.

Graphical user interface, diagram

Description automatically generated

1. Update any of the editable fields outlined below.

Graphical user interface

Description automatically generated

1. Click the Save icon.

A picture containing application

Description automatically generated

**Note: Click the Cancel icon to discard the changes and exit edit mode.**

Background pattern

Description automatically generated with medium confidence

**Click the Yes button to** **discard the changes and exit edit mode.**

Graphical user interface, application

Description automatically generated

**Click the No button to prevent the changes from being delete.**  Graphical user interface, application

Description automatically generated

### Make School Inactive

1. Select the school from the Select School drop-down.

Graphical user interface, application

Description automatically generated

1. Click Edit icon.

Icon

Description automatically generated

1. Click the Status toggle.

A picture containing diagram

Description automatically generated

1. Click Save icon.



**Note: Click the Cancel icon to discard the changes and exit edit mode.**

Background pattern

Description automatically generated with medium confidence

**Click the Yes button to** **discard the changes and exit edit mode.**

Graphical user interface, application

Description automatically generated

**Click the No button to prevent the changes from being delete.**  Graphical user interface, application

Description automatically generated

### Edit School Times

1. Select the school to edit from the Schools drop-down.

Graphical user interface

Description automatically generated with low confidence

1. Click the Edit icon.

Graphical user interface, text, application

Description automatically generated

1. Click the Edit Time toggle.

A picture containing graphical user interface

Description automatically generated

1. Update the Start Time.

Graphical user interface, application

Description automatically generated

1. Update the End Time.

Graphical user interface

Description automatically generated

1. Click the Save button.

Graphical user interface, application

Description automatically generated

1. Click the Save icon.

A picture containing application

Description automatically generated

**Note: Click the Cancel icon to discard the changes and exit edit mode.**

Background pattern

Description automatically generated with medium confidence

**Click the Yes button to** **discard the changes and exit edit mode.**

Graphical user interface, application

Description automatically generated

**Click the No button to prevent the changes from being delete.**  Graphical user interface, application

Description automatically generated

### Delete School

1. Select the school from the Select School drop-down.

Graphical user interface, application

Description automatically generated

1. Click the Delete icon.

Graphical user interface

Description automatically generated with medium confidence

1. Click the Yes icon to confirm deletion.

Graphical user interface, text, application, email

Description automatically generated

**Note: Click the No icon to prevent the school from being deleted.**

Graphical user interface, application

Description automatically generated

### View Specific School Information

1. Select the school to view from the Select School drop-down.

Graphical user interface, application

Description automatically generated

### Export Specific School Information

1. Select the school from the Select School drop-down.

Graphical user interface, application

Description automatically generated

1. Click Export icon.

Graphical user interface, application

Description automatically generated

1. Click Save icon.

Graphical user interface, text, application

Description automatically generated

**Note: Click the Cancel icon to discard the report.**

Graphical user interface, text, application, email

Description automatically generated

# Finance Tab

## General

### Page Summary

This page allows you to view the school cost share amounts as well as all the in-kind amounts for a specific year. The year, in-kind type, and type of year can all be filtered. On this page a cost share amount can be added or edited, and an in-kind amount can be added or edited.

### Navigate to General Page

1. Click on the Finance Tab

Graphical user interface, application

Description automatically generated

1. Click on the General Tab

Graphical user interface, text, application

Description automatically generated

### View Specific Year’s Cost Share Data

1. Click on the Select Year dropdown to filter out a specific year’s cost share data.

A picture containing graphical user interface

Description automatically generated

Add Quarterly Cost Share Amount

1. Click the Add icon.

Graphical user interface, text, application, chat or text message

Description automatically generated

1. Enter all the cost share information.

Graphical user interface, text, application, email

Description automatically generated

1. Click the Save icon.

Chart

Description automatically generated with medium confidence

**Note: Click the Cancel icon to discard the changes and exit add mode.**

Chart

Description automatically generated with medium confidence

**Click the Yes button to** **discard the changes and exit add mode.**

Graphical user interface, application

Description automatically generated

**Click the No button to prevent the changes from being delete.**  Graphical user interface, application

Description automatically generated

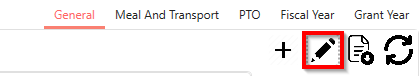
### Edit Quarterly Cost Share Amount

1. Click the Cost Share you want to edit.

Table

Description automatically generated

1. Click the Edit icon.



1. Update any of the editable fields outlined below.

Graphical user interface, text, application, email

Description automatically generated

1. Click the Save icon to save the changes made.

Graphical user interface, text, application, email

Description automatically generated

**Note: Click the Cancel icon to discard the changes and exit edit mode.**

Chart

Description automatically generated with medium confidence

**Click the Yes button to** **discard the changes and exit edit mode.**

Graphical user interface, application

Description automatically generated

**Click the No button to prevent the changes from being delete.**  Graphical user interface, application

Description automatically generated

### Delete Quarterly Cost Share Amount

1. Select the Cost Share to be deleted.

Graphical user interface, application

Description automatically generated

1. Click the Edit icon.

Graphical user interface, application, Word

Description automatically generated

1. Click the Delete icon.

Text

Description automatically generated

1. Click the Yes button to confirm the deletion.

Graphical user interface, text, application, email

Description automatically generated

**Note: Click the No button to prevent the cost share amount from being deleted.**

Graphical user interface, text, application

Description automatically generated

### View Specific In-Kind Expense Type

1. Select the expense type to view from the In-Kind Expense Type drop-down.

A picture containing chart

Description automatically generated

### View In-Kind Expense Year Range

1. Select year range from Year Range drop-down.

Graphical user interface

Description automatically generated with medium confidence

### View Type Year

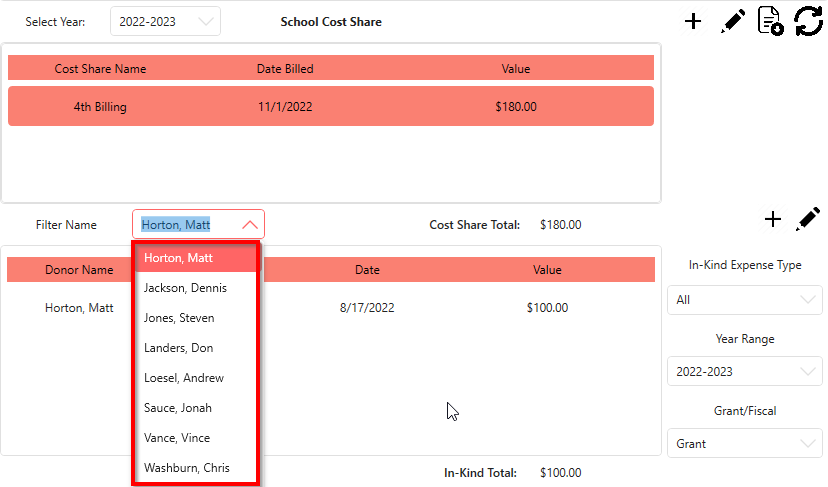
1. Select either grant or fiscal from the Grant/Fiscal drop-down.

A picture containing graphical user interface

Description automatically generated

### Filter By Donor

1. Select volunteer name from Name drop-down.



### Add New In-Kind Expense

1. Click Add icon.

Graphical user interface, application, PowerPoint

Description automatically generated

1. Enter the expense information. All required fields are outlined below.

Graphical user interface, text, application, email

Description automatically generated

1. Click the Save icon.

A picture containing application

Description automatically generated

**Note: Click the Cancel icon to discard the changes and exit add mode.**

Chart

Description automatically generated with medium confidence

**Click the Confirm Icon to** **discard the changes and exit add mode.**

Graphical user interface, text, application

Description automatically generated

**Click the Cancel Icon to prevent the changes from being delete.**

Graphical user interface, text

Description automatically generated

**Note: When entering a Donation, the Donor Name field requires a manual entry.**

Graphical user interface, text, application, email

Description automatically generated

### Edit In-Kind Expense

1. Select Expense to edit.

A picture containing table

Description automatically generated

1. Click the Edit icon.

A picture containing graphical user interface

Description automatically generated

1. Update any of the editable fields outlined below.

Graphical user interface, text, application, email

Description automatically generated

1. Click the Save icon to persist your changes.

Graphical user interface, text, application, email

Description automatically generated

**Note: Click the Cancel icon to discard the changes and exit edit mode.**

Chart

Description automatically generated with medium confidence

**Click the Confirm Icon to** **discard the changes and exit edit mode.**

Graphical user interface, text, application

Description automatically generated

**Click the Cancel Icon to prevent the changes from being delete.**

Graphical user interface, text

Description automatically generated

## 

## Meal and Transport

### Page Summary

This page allows you to view all volunteer’s meals and transportation data for a specific year and month. On this page a volunteer’s data can be edited and the information can be exported to Excel.

### Navigate to Meal and Transport Page

1. Click on the Finance Tab

Graphical user interface, application

Description automatically generated

1. Click on the Meal and Transport Tab

Graphical user interface, application

Description automatically generated

### View Specific Date’s Information

1. Select a year from the Select Year Range drop-down.

Graphical user interface, application

Description automatically generated

1. Select a month from the Select Month drop-down.

Graphical user interface, application

Description automatically generated

### View Specific Volunteer's Meal and Transportation Information

1. Select a volunteer from the Filter Name drop-down.

Graphical user interface, application

Description automatically generated

### Edit Meals and Transportation Information

1. Click the Edit icon.

Graphical user interface, application

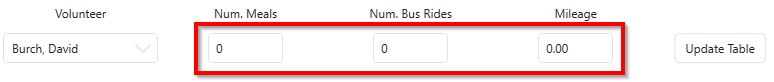
Description automatically generated with medium confidence

1. Select volunteer to edit.

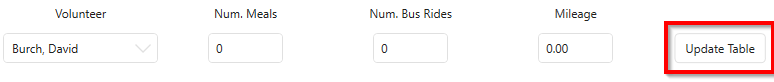
Graphical user interface

Description automatically generated with medium confidence

1. Update any of the editable fields outlined below.



1. Click the Update Table icon.



1. Click the Save icon to persist your changes.

A picture containing table

Description automatically generated

**Note: Click the Cancel icon to discard the changes and exit edit mode.**

Text

Description automatically generated with low confidence

**Click the Confirm Icon to** **discard the changes and exit edit mode.**

Graphical user interface, application

Description automatically generated

**Click the Cancel Icon to prevent the changes from being delete.**

Graphical user interface, application

Description automatically generated

### Export Meals and Transport Information to Excel

1. Select month and year combination for data to be exported.

A picture containing graphical user interface

Description automatically generated

1. Select volunteer name to export only one volunteer’s data.

Shape

Description automatically generated

1. Click Export icon.

Graphical user interface, application

Description automatically generated

1. Click Save icon.

Graphical user interface, text, application

Description automatically generated

**Note: Click the Cancel discard report.**

Graphical user interface, text, application

Description automatically generated

## PTO

### Page Summary

This page allows you to view all volunteer’s PTO data for a specific year and month. On this page a volunteer’s data can be edited and the information can be exported to Excel.

### Navigate to PTO Page

1. Click the Finance Tab

Graphical user interface, application

Description automatically generated

1. Click the PTO Tab.

Graphical user interface, application, Word

Description automatically generated

### View Specific Date’s PTO Information

1. Select a year from the Year drop-down.

A picture containing graphical user interface

Description automatically generated

1. Select a month from the Month drop-down.

Graphical user interface, application

Description automatically generated

### View Specific Volunteer PTO

1. Type volunteer’s name into Search Volunteer textbox.

A picture containing graphical user interface

Description automatically generated

### Edit Volunteer PTO Information

1. Click the Edit icon.

Graphical user interface, application

Description automatically generated

1. Select volunteer to edit.

A picture containing graphical user interface

Description automatically generated

1. Update any of the editable fields outlined below.

Graphical user interface, application

Description automatically generated

1. Click the Add To Table icon.

Graphical user interface, text, application, chat or text message

Description automatically generated

1. Click the Save icon to persist your changes.

Icon

Description automatically generated

**Note: Click the Cancel icon to discard the changes and exit edit mode.**

Icon

Description automatically generated

**Click the Confirm Icon to** **discard the changes and exit edit mode.**

Graphical user interface, application

Description automatically generated

**Click the Cancel Icon to prevent the changes from being delete.**

Graphical user interface, application

Description automatically generated

### Export PTO Information to Excel

1. Select month and year combination for data to be exported.

Graphical user interface, application, Word

Description automatically generated

1. Type a volunteer’s name to export only one volunteer’s data.

Shape

Description automatically generated

1. Click Export icon.

Whiteboard

Description automatically generated with low confidence

1. Click Save icon.

Graphical user interface, application

Description automatically generated

**Note: Click the Cancel discard report.** Graphical user interface, text, application, email

Description automatically generated

## Fiscal Year

### Page Summary

This page allows you to view the Meal-In-Kind, Volunteer Milage, Year to Date In-Kind, Bus Transportation data for a specific fiscal year. You can also view a further broken-down report of any of the categories and can export the data to Excel.

### Navigate to Fiscal Year

1. Click the Finance Tab.

Graphical user interface, application

Description automatically generated

1. Click the Fiscal Year Tab.

Graphical user interface, text, application

Description automatically generated

### View Specific Year Range

1. Select year range from the Fiscal Date Range drop-down.

Graphical user interface

Description automatically generated

### 

### View Category Breakdown

1. Click the Search icon for any of the four of the categories to view them in full screen.

Graphical user interface, application

Description automatically generated

**Note: Click the Minimize icon to return to the main view.**

A picture containing graphical user interface

Description automatically generated

### Export Category Breakdown

1. Click the Search icon to expand the category you want to export.

Graphical user interface, application

Description automatically generated

1. Enter a start date in the Start Date textbox.

Graphical user interface, text

Description automatically generated with medium confidence

1. Enter an end date in the End Date textbox.

A picture containing text

Description automatically generated

1. Click the Export icon.

Graphical user interface, application

Description automatically generated

1. Click the Save button.

Graphical user interface, text, application

Description automatically generated

**Note: Click the Cancel button to discard the report.**

Graphical user interface, text, application

Description automatically generated

### View Specific Date in Category Breakdown

1. Enter a start date in the Start Date textbox.

Graphical user interface, text

Description automatically generated with medium confidence

1. Enter an end date in the End Date textbox.

A picture containing text

Description automatically generated

### Export Quarterly Fiscal Year Information

1. Click the Export icon.

Graphical user interface, application

Description automatically generated

1. Click the Save button.

Graphical user interface, text, application

Description automatically generated

**Note: Click the Cancel button to discard the report.**

Graphical user interface, text, application, email

Description automatically generated

## Grant Year

### Page Summary

This page allows you to view the Meal-In-Kind, Volunteer Milage, Year to Date In-Kind, Bus Transportation data for a specific grant year. You can also view a further broken-down report of any of the categories and can export the data to Excel.

### Navigate to Grant Year Page

1. Click the Finance Tab.

Graphical user interface, application

Description automatically generated

1. Click the Grant Year Tab.

Graphical user interface, text, application

Description automatically generated

### View Specific Year Range

1. Select year range from the Grant Date Range drop-down.

Graphical user interface, application

Description automatically generated

### View Category Breakdown

1. Click the Search icon for any of the four of the categories to view them in full screen.

**Note: Click the Minimize icon to return to the main view.**

A screenshot of a computer

Description automatically generated

Graphical user interface, application

Description automatically generated

### Export Category Breakdown

1. Click the Search icon to expand the category you want to export.

Graphical user interface, application

Description automatically generated

1. Enter a start date in the Start Date textbox.

Graphical user interface, text

Description automatically generated with medium confidence

1. Enter an end date in the End Date textbox.

A picture containing text

Description automatically generated

1. Click the Export icon.

Graphical user interface, text, application

Description automatically generated

1. Click the Save button.

Graphical user interface, text, application

Description automatically generated

**Note: Click the Cancel button to discard the report.**

Graphical user interface, text, application

Description automatically generated

### View Specific Date in Category Breakdown

1. Enter a start date in the Start Date textbox.

Graphical user interface, text, Word, whiteboard

Description automatically generated with medium confidence

1. Enter an end date in the End Date textbox.

A picture containing graphical user interface

Description automatically generated

### Export Quarterly Grant Year Information

1. Click the Export icon.

Graphical user interface, text, application

Description automatically generated

1. Click the Save button.

Graphical user interface, text, application

Description automatically generated

**Note: Click the Cancel button to discard the report.**

Graphical user interface, text, application

Description automatically generated

# Reports Tab

## Report Builder

### Page Summary

This page allows you to build custom reports with different volunteer, school, and financial information for current, former, active, and inactive volunteers. These reports can be sorted by date or by volunteer name. This page also allows you to save and use preset reports.

### Navigate to Report Builder Page

1. Click the Report Tab

A picture containing graphical user interface

Description automatically generated

1. Click the Report Builder Tab

Graphical user interface

Description automatically generated with medium confidence

### Build Custom Report

1. Select the value to sort the report by from the Sort By drop-down.

Graphical user interface, application

Description automatically generated

1. Select what type of volunteers should be included in the report.

Graphical user interface, text, application

Description automatically generated

1. Click the Select All Volunteers checkbox to get information for all volunteers for the build or choose a volunteer name from the Volunteer Name drop-down to get only their information for the build.

Graphical user interface, application

Description automatically generated

1. Enter a start date for when to start pulling information from for the build.

Graphical user interface, application

Description automatically generated

1. Enter an end date for when to stop pulling information from for the build. By default, this date is set to the current date.

Graphical user interface, application

Description automatically generated

1. Select the desired information to be added to the build.

Graphical user interface, text, application

Description automatically generated

1. Click the Move button.

Graphical user interface, application

Description automatically generated

1. Click the Generate Report button after all of the information has been added to the right panel of the page.

Graphical user interface, application

Description automatically generated

### Add Preset Report

1. Build the report you want to be saved as a preset.

Graphical user interface, application

Description automatically generated

1. Click the Add icon.

A picture containing icon

Description automatically generated

1. Enter the name for the report in the Preset Name textbox.

Graphical user interface

Description automatically generated with low confidence

1. Click the Save icon.

Text

Description automatically generated with low confidence

**Note: Click the Cancel icon to discard the changes and exit add mode.**

Text

Description automatically generated

**Click the Confirm Icon to** **discard the changes and exit add mode.**

Graphical user interface, text, application

Description automatically generated

**Click the Cancel Icon to prevent the changes from being delete.**

Graphical user interface, text

Description automatically generated

### Use Preset Report

1. Select the preset report from the Presets drop-down.

Graphical user interface, text, application

Description automatically generated

1. Click the Generate Report button.

Graphical user interface, application

Description automatically generated

### Edit Preset Name

1. Select the preset report from the Presets drop-down.

Graphical user interface, text, application

Description automatically generated

1. Click the Edit icon.



1. Update the preset’s name.

Graphical user interface, text

Description automatically generated with medium confidence

1. Click the Save icon.

Text

Description automatically generated

**Note: Click the Cancel icon to discard the changes and exit edit mode.**

Text

Description automatically generated

**Click the Confirm Icon to** **discard the changes and exit edit mode.**

Graphical user interface, text, application

Description automatically generated

**Click the Cancel Icon to prevent the changes from being delete.**

Graphical user interface, text

Description automatically generated

### Delete Preset

1. Select the preset report from the Presets drop-down.

Graphical user interface, text, application

Description automatically generated

1. Click the Delete icon.



1. Click the Confirm button to confirm that you wish to delete the preset.

Graphical user interface, text, application

Description automatically generated

**Note: Click the Cancel icon to prevent the preset from being deleted.**

Graphical user interface, text, application, Word

Description automatically generated

## 

## Annual Check

### Page Summary

This page allows you to view all volunteers’ annual check information. You can filter by only current volunteers and by volunteers who are missing documentation. Each volunteers’ information can be expanded to also see the one-time checks for the volunteer.

### Navigate to Annual Check Page

1. Click on the Reports tab.  
   Graphical user interface, text, application

   Description automatically generated
2. Click on the Annual Check tab.  
   A picture containing text

   Description automatically generated

### View Current Volunteers

1. Click the Current Volunteers toggle switch to on.

Graphical user interface

Description automatically generated

### View Volunteer’s Missing Documentation

1. Click the Missing Documentation toggle switch on. Graphical user interface

   Description automatically generated with low confidence

### View Volunteer’s Check Information

1. Click the drop-down of the Volunteer whose information you want to check.  
   Graphical user interface, application, Word

   Description automatically generated

## 

## Volunteer Information

### Page Summary

This page allows you to view and edit the general demographic information for all volunteers. On this page you can also filter by a specific volunteer or by a specific status type.

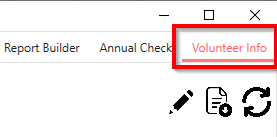
### Navigate to Volunteer Information Page

1. Click on the Reports Tab

Graphical user interface, text, application

Description automatically generated

1. Click on the Volunteer Info Tab



### Edit Volunteer Information

1. Select volunteer to edit.

Table

Description automatically generated with low confidence

1. Click Edit icon.

Graphical user interface, application, Word

Description automatically generated

1. Update any of the editable fields outlined below.

Graphical user interface, application, email

Description automatically generated

1. Click Save icon.

Graphical user interface, application

Description automatically generated

**Note: Click the Cancel icon to discard the changes and exit edit mode.**



**Click the Yes button to** **discard the changes and exit edit mode.**

Graphical user interface, application

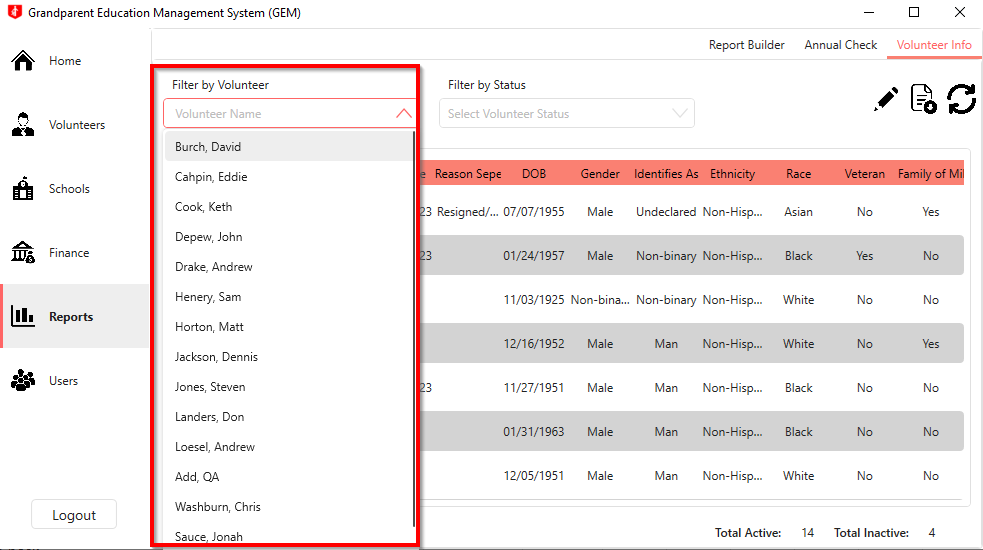
Description automatically generated

**Click the No button to prevent the changes from being delete.**  Graphical user interface, application

Description automatically generated

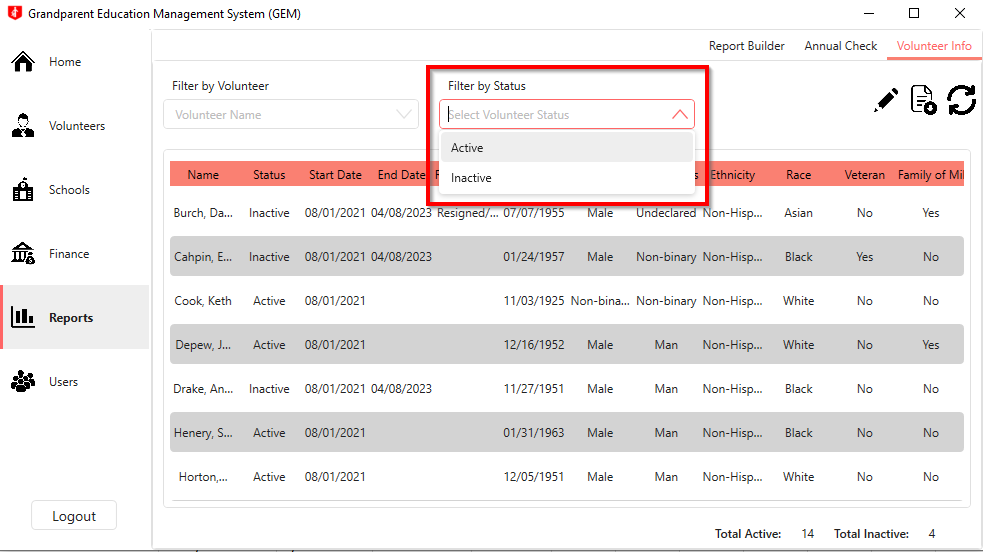
### View Specific Volunteer

1. Click on the Volunteer Name drop-down to view a specific volunteer’s information.



### View Volunteers Based on Status

1. Select a status from the Volunteer Status drop-down to view volunteer’s information based on status.



### Export Volunteer Information to Excel

1. Select a volunteer’s name from the Volunteer Name drop-down to export only one volunteer’s information to Microsoft Excel, otherwise all of the volunteer’s information will be exported to Microsoft Excel.

Graphical user interface, application

Description automatically generated

1. Select a volunteer status from the Select Volunteer Status drop-down to export only inactive or active volunteer’s information to Microsoft Excel.

Graphical user interface, text

Description automatically generated with medium confidence

1. Click the Export icon.

Graphical user interface, application

Description automatically generated

1. Click the Save button.

Graphical user interface, text, application

Description automatically generated

**Note: Click the Cancel button to discard the report.**

Graphical user interface, text, application, email

Description automatically generated

# Users Tab

## Users

### Page Summary

This page allows you to view, edit or add users to the system only if your user account has administration privileges. Through this screen you can update a user’s password or change someone’s administration privileges as well as update rates, add items to categories, reset child assignments and add a new year’s stipend amount.

### Navigate to the User Tab

1. Click on the Users Tab.

A picture containing text

Description automatically generated

1. Click on the Users Tab.

Graphical user interface

Description automatically generated

### Add New User

1. Click on the Add icon.

Graphical user interface

Description automatically generated with low confidence

1. Enter the user information. The required fields are outlined below.

Graphical user interface, table

Description automatically generated with medium confidence

**Note:**

1. Password must be longer than 8 characters.
2. Password must contain at least 1 capital letter.
3. Password must contain at least 1 number.
4. Password must contain at least 1 of the following special characters: !@#%-\_?&\*%
5. Click the Save icon when done.

Graphical user interface, application

Description automatically generated

**Note: Click the Cancel icon to discard the changes and exit add mode.**

Graphical user interface, application

Description automatically generated

**Click the Yes button to** **discard the changes and exit add mode.**

Graphical user interface, application

Description automatically generated

**Click the No button to prevent the changes from being delete.**  Graphical user interface, application

Description automatically generated

### Edit User Info

1. Select a user from the list.

Table

Description automatically generated

1. Click the Edit icon.

A picture containing graphical user interface

Description automatically generated

1. Update any of the editable fields outlined below.

Graphical user interface

Description automatically generated

**Note:**

1. Password must be longer than 8 characters.
2. Password must contain at least 1 capital letter.
3. Password must contain at least 1 number.
4. Password must contain at least 1 of the following special characters: !@#%-\_?&\*%
5. Click the Save icon to persist your changes.

Graphical user interface, text, application

Description automatically generated

**Note: Click the Cancel icon to discard the changes and exit edit mode.**

Graphical user interface, text, application

Description automatically generated

**Click the Yes button to** **discard the changes and exit edit mode.**

Graphical user interface, application

Description automatically generated

**Click the No button to prevent the changes from being delete.**  Graphical user interface, application

Description automatically generated

### Delete User

1. Select a user from the list.

Table

Description automatically generated

1. Click the Delete icon.

Table

Description automatically generated

1. Click the Yes icon to confirm the deletion.

Graphical user interface, text, application, email

Description automatically generated

**Note: Click the No icon to prevent preset from being deleted.**

Graphical user interface, text, application

Description automatically generated

## Admin Tasks

### Page Summary

This page allows you to add new items to different categories, add a deleted volunteer back into the system, modify rates and meal or mileage values, enter grant year stipend and remove all students assigned to all volunteers.

### Navigate to the Admin Tasks Tab

1. Click the Users Tab.

A picture containing text

Description automatically generated

1. Click the Admin Tasks Tab.

A picture containing diagram

Description automatically generated

### Add Item to Category

1. Click the radio button for the category you want to add a new item to.

Graphical user interface, application

Description automatically generated

1. Type the new item into the Add New textbox.

Graphical user interface, application

Description automatically generated

1. Click the Add button.

Graphical user interface, application

Description automatically generated

### Add Temporary Information Field

1. Click on the Temp Info radio button to enter in a temporary information Graphical user interface, application

   Description automatically generated
2. Enter the temp info field name into the Add New textbox.

Graphical user interface, application

Description automatically generated

1. Select whether it will be a Date entry or a Checkbox entry.

Graphical user interface, application

Description automatically generated

1. Click the Add button.

Graphical user interface, application

Description automatically generated

### Delete Category Item

1. Click the radio button for the category you want to delete an item from.

Graphical user interface, application

Description automatically generated

1. Click the Delete icon next to the item to be deleted.

Graphical user interface

Description automatically generated with low confidence

1. Click the Yes button to confirm the item is to be deleted.

Graphical user interface, application, PowerPoint

Description automatically generated

**Note: Click the No button to prevent the item from being deleted.**

Graphical user interface, application

Description automatically generated

### Recover Deleted Volunteer

1. Click the Add icon next to the volunteer you want added back into the system.

Graphical user interface, application

Description automatically generated

### Edit Student Needs

1. Click the Edit icon next to the need you want to update.

Graphical user interface

Description automatically generated

1. Update any of the editable fields outlined below that you wish to edit.

Graphical user interface, application

Description automatically generated

1. Click the Save icon.

A picture containing chart

Description automatically generated

**Note: Click the Cancel icon to discard the changes and exit edit mode.**

A picture containing chart

Description automatically generated

**Click the Yes button to** **discard the changes and exit edit mode.**

Graphical user interface, application

Description automatically generated

**Click the No button to prevent the changes from being delete.**  Graphical user interface, application

Description automatically generated

### Delete Student Needs

1. Click the Delete icon next to the need you want to remove.

Graphical user interface

Description automatically generated

1. Click the Yes button to confirm the need is to be deleted.

Graphical user interface, text, application, email

Description automatically generated

**Note: Click the No button to prevent the need from being deleted.**

Graphical user interface, text, application, email

Description automatically generated

### Edit Student Conditions

1. Click the Edit icon next to the condition you want to update.

Graphical user interface, application

Description automatically generated

1. Update any of the editable fields outlined below that you wish to edit.

Graphical user interface, text, application, email

Description automatically generated

1. Click the Save icon.

Text

Description automatically generated with medium confidence

**Note: Click the Cancel icon to discard the changes and exit edit mode.**

Text

Description automatically generated with medium confidence

**Click the Yes button to** **discard the changes and exit edit mode.**

Graphical user interface, application

Description automatically generated

**Click the No button to prevent the changes from being delete.**  Graphical user interface, application

Description automatically generated

### Delete Student Conditions

1. Click the Delete icon next to the condition you want to remove.

Graphical user interface, application

Description automatically generated

1. Click the Yes button to confirm the condition is to be deleted.

Graphical user interface, text, application, email

Description automatically generated

**Note: Click the No button to prevent the condition from being deleted.**

Graphical user interface, text, application, email

Description automatically generated

### Edit Rates

1. Update any of the editable rate fields outlined below.

Graphical user interface, application

Description automatically generated

1. Click the corresponing Save button to the changed field.

Graphical user interface, application

Description automatically generated

### 

### Set Grant Year Stipend

1. Enter the grant year start date.

Graphical user interface, application

Description automatically generated

1. Enter in the Grant Stipend amount.

Graphical user interface, application

Description automatically generated

1. Click the Set Total Grant Stipend amount button.

Graphical user interface, application

Description automatically generated

### Delete All Students Assigned to Volunteers

1. Click the Reset Child Assignments button to delete all students assigned to volunteers.

Graphical user interface, text, application

Description automatically generated

1. Click the Yes button.

Graphical user interface, application

Description automatically generated

**Note: Click the No button to prevent the students from being deleted.**

Graphical user interface, application

Description automatically generated