OVERVIEW

Nonprofit organizations who rely on volunteers to support their mission or who want to efficiently utilize their volunteer base need a solid and executable volunteer management strategy to support and scale their organizations and to maximize the impact they deliver.

The Volunteer Management Event Registration & Participation Report enables nonprofits to analyze engagement and participation metrics to boost opportunity preparedness and drive success.

This report is built upon and compatible with the Microsoft Nonprofit Accelerator core (Microsoft Cloud for Nonprofits).

The Volunteer Management Event Registration & Participation Report powers involvement and increases optimization of opportunities by helping you:

- Identify gaps in event scheduling, registrations and required qualifications.
- Pinpoint high performing programs and delivery frameworks.
- Forecast engagement to allow for efficient event planning.

Provides Key Performance Indicators including:

- Days Booked & Total Participation Hours
- Volunteers by Required Qualifications
- Registrations and Participation Over Time
- Confirmed and Pending Registrations

INSTALLATION INSTRUCTIONS

Prerequisites:

- Install user must have administrative privileges for Dynamics 365 and Power BI
- Power BI Pro licenses must be applied for all users who will access the Event Registration and Participation app

Installation:

1. Download the Power BI template app from AppSource
2. Install the Power BI template app into your organization's environment
3. After the Power BI template app is installed, the app configuration options page is displayed

4. Connect your Dynamics 365 organization to the Power BI template app
   a. On the Power BI template app configuration options page, select **Connect**
   b. On the connect data page, enter the URL for your Dynamics 365 organization, and then select **Next**
   c. For **Authentication method**, select **OAuth2** and for **Privacy level**, select **Organizational**. Select **Sign in**
   d. Enter your Dynamics 365 Sales credentials, and then select **Enter**
5. Configure the refresh frequency for the Power BI dataset
   a. Sign into Power BI as an administrator.
   b. Go to the Power BI template app workspace.
   c. On the **Datasets** tab, select **Settings**.
   d. Under **Scheduled refresh**, turn on the **Keep your data up to date** toggle.
6. Publish the application within your organization
   a. On the app workspace, select **Update app.**
   b. On the **Permissions** tab, select **Entire organization**, and then select **Update app**

Congratulations! The Event Registration and Participation app is now available for installation by your users.