

## Volunteers: How Add and Assign Tasks

| <i>Speech</i>   | <i>Cursor/On-Screen</i>                                 |
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| A Task is a job that you need a volunteer to complete. For example, perhaps you're hosting an event, and you need to find a volunteer to run the sign-in desk and greet attendees as they arrive.   |   |
| To do this, expand Time & Scheduling, and open the Volunteer & Staff Tasks list.  | Expand Time & Scheduling, open Volunteer & Staff Tasks. |
| Click New to define a New task.   | Click New   |
| When making a new task, you can choose to use a template, create a new task from scratch, or set-up a new template. Templates save time when entering similar tasks that occur frequently. However, for this example, we'll set up a task from scratch. | Choose From Scratch.                                    |
| First define the Task Type to specify what kind of task this is. For this example, we'll say it's an "Event" task.  | Choose Task Type: Event                                 |
| You could also specify a Department, a Program, or an Activity Type   | Point to Department, Program, and Activity Type.        |
| For this example, I'll choose the Special Events Program,   | Choose Program: Special Events                          |
| and the Activity Type will be Event Sign-in   | Choose Activity Type: Event Sign-in                     |
| We can link the Task to the appropriate Event.  | Choose Event: 2014 Gala                                 |
| You could also fill in any necessary Location information for this Task,  | Point to Location field                                 |
| or list the Volunteer Coordinator's name so that the volunteer knows who they should report to if they have questions about this task.  | Point to Coordinator field                              |
| Describe what needs to be done.   | Enter Description: Manage Event Sign-in Table           |
| And when  | Choose date   |
|   | Start Time: 6:00 p.m.<br>End Time: 9:00 p.m.            |
| Sumac calculates the duration of this task for you.   | Point to Duration field.                                |
| The Assignment Status will always start out as "unassigned," but this will change after we assign a volunteer to do this job.   | Point to Assignment Status field.                       |
| The Worker field will also start out blank, but the volunteer's name will be filled in once we assign a volunteer to this task.   | Point to Worker field                                   |
| You can also record any necessary assignment notes.   | Point to Assignment Notes.                              |
| And once the task is complete, you can record the date it was completed, as well as any completion notes.   | Point to End Date and Completion Notes.                 |

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| In the top right of this Task window, you'll notice an area for Required Skills. This is where you define what Skills are required of the volunteer in order for them to complete this task successfully. | Point to Required Skills                                   |
| Click Add to add some required Skills.  | Click Add.   |
| For example, because the volunteer will be running the Sign-in table at this event, perhaps you require that the volunteer have some experience with Reception in order to do this task properly.         | Expand “office admin” and select “receptionist”            |
| Click OK, and now Sumac knows that it should only suggest volunteers who have reception experience.   | Click OK.  |
| Click OK to save the Task in the database.  | Click OK   |
| You'll notice that when we saved this task, a lot of coloured boxes appeared next to all the volunteers names on the right side of the Tasks window.  | Point to list of Workers.                                  |
| A green box means the volunteer has what is required.   | Point to a green box.                                      |
| A yellow box means the volunteer <i>might</i> have what is required.  | Point to a yellow box.                                     |
| And a red box means the volunteer does not have what is required.   | Point to a red box.  |
| This is how Sumac helps you find the best volunteer for the job!  |  |
| We can sort by the Skills column,   | Sort by Skills   |
| and Sumac brings the most qualified volunteers to the top of the list.  | Point to qualified volunteers.                             |
| For example, we can see that [name] has the skills required, and she's available, but she's said that she does <i>not</i> want to do this kind of task, so she is not a good candidate for this job.      | Point to an example volunteer                              |
| [name] also has the skills required, but she is not available at the time of the event, so [name] is not a good candidate for this job either.  | Point to an example volunteer                              |
| But [name] has the required skills, is available, and she's said she likes to do this kind of task, so we've found the right person for the job!  | Point to an example volunteer                              |
| To assign [name] to this task, select [name] in the list of volunteers, expand Special Editing, and click Assign.   | Select [name], expand Special Editing, click Assign.       |
| Note that when you assign a task, the status becomes “assignment proposed.”   | Point to Assignment Status column “Assignment Proposed”    |
| If the status is more definite than that, click Set Assignment Status and choose a more appropriate status.   | Click Set Assignment Status, and choose “Contact Accepted” |
| <i>Check out more training videos to learn more about how you can use Sumac to manage your volunteers.</i>  |  |

