

Fundly Connect – Team Time Off

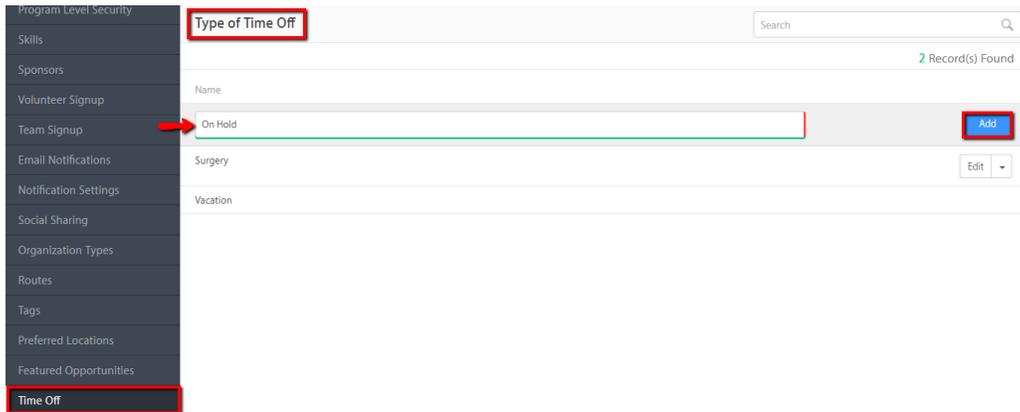
For Organization Admin (MOW)

Team Captains and Admins can schedule Time Offs for their teams. Volunteering schedules that fall on the time off dates are removed from the team and its members' schedule.

Configuring Types of Time Off

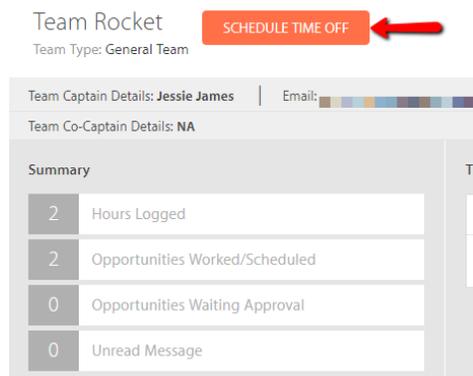
Admins have the ability to configure different types of time offs. When scheduling a time off, the user will be required to select from the type of Time Offs configured.

From admin dashboard, open the main menu then go to Configurations. Select 'Time Off' to open the 'Type of Time Off' page, where you can add, edits and remove the different types.



Scheduling Time Off for a Team

Admins will be able to schedule time offs for teams from their Team Profile by clicking on the 'Schedule Time Off' button.



A 'Schedule Time Off' popup will come up where you must select the type and date range of the time off. You'll also have the option to enter the reason or any other comments on the 'Reason' field. Click Next.

Schedule Time Off

Type :

From :  To : 

Reason :

The system will then process the time off schedule and will recognize if team volunteering schedule/s are impacted on those time off dates. The page will display all impacted opportunities and dates where you must confirm to proceed.

Schedule Time Off - Opportunities Impacted

Note: You will no longer be scheduled for the opportunities on these dates.

Meal Delivery

- 3/27/2017
- 3/28/2017
- 3/29/2017

After the time off has been confirmed, it will remove all impacted schedules for both the team and its members. And by this time, the Team Captain and the members with impacted schedules are notified of the team's time off scheduled by the Admin.

Viewing Team Time Offs

As the Team Captain, you will find the details of your team's time off schedule on different places on your dashboard.

It will display a message at the top of the profile if the team is on time off, as well as the upcoming ones.

The screenshot shows a dashboard for 'Team Rocket' (Team Type: General Team, PIN: B000004358). At the top, a yellow banner displays 'UPCOMING VACATION FROM 3/27/2017 TO 3/31/2017' with a red arrow pointing to the text and a 'View Time Off History' button. Below this, there is a 'SCHEDULE TIME OFF' button. The dashboard is divided into sections for Team Captain Details (Jessie James), Team Co-Captain Details (NA), and a Summary section. The Summary section contains four items: 2 Hours Logged, 2 Opportunities Worked/Scheduled, 0 Opportunities Waiting Approval, and 0 Unread Message. To the right, a 'Trainings' section shows a table with columns for Training, Date, and Attended Dates, but it contains a 'No records found.' message.

The team calendar will also highlight the time off dates and also remove existing schedules on those dates.

The screenshot shows an 'Opportunity Calendar' with a grid of dates from 12 to 31. The calendar highlights the vacation period from March 27th to March 31st in yellow. A red arrow points to the 27th. The calendar also shows existing schedules for '706A Meal Delivery' at 'Spring Valley United Methodist Church' on days 13, 14, 15, 20, 21, and 22. The schedule for the 27th is removed, indicating the impact of the time off.

Opportunity Calendar	Opportunity List	Opportunity List	Opportunity List	Opportunity List	Opportunity List	Opportunity List
12	13 10:00 AM - 12:00 PM 706A Meal Delivery Spring Valley United Methodist Church	14 10:00 AM - 12:00 PM 706A Meal Delivery Spring Valley United Methodist Church	15 10:00 AM - 12:00 PM 706A Meal Delivery Spring Valley United Methodist Church	16	17	18
19	20 10:00 AM - 12:00 PM 706A Meal Delivery Spring Valley United Methodist Church	21 10:00 AM - 12:00 PM 706A Meal Delivery Spring Valley United Methodist Church	22 10:00 AM - 12:00 PM 706A Meal Delivery Spring Valley United Methodist Church	23	24	25
26	27 [Vacation]	28	29	30	31	1

At the bottom of the team page, you will find the team's 'Time Off History'.

■ Schedule for opportunity |
 ■ Schedule for training |
 ■ Schedule under team |
 ■ Volunteer is on time off

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
26	27 10:00 AM - 12:00 PM 706A Meal Delivery Spring Valley United Methodist Church	28 10:00 AM - 12:00 PM 706A Meal Delivery Spring Valley United Methodist Church	1 10:00 AM - 12:00 PM 706A Meal Delivery Spring Valley United Methodist Church	2	3	4
5	6 10:00 AM - 12:00 PM 706A Meal Delivery Spring Valley United Methodist Church	7 10:00 AM - 12:00 PM 706A Meal Delivery Spring Valley United Methodist Church	8 10:00 AM - 12:00 PM 706A Meal Delivery Spring Valley United Methodist Church	9	10	11

Team Members

Add Team Member

First Name	Last Name	Email	Mobile No.
Ash	Ketchum		(111) 111-1111 ext.1111
Bonnie	Clemont		(333) 333-3333 ext.3333
Serena	Meyer		(222) 222-2222 ext.2222

Time Off History

Date	Type	Reason
3/27/2017 - 3/31/2017	On Hold	No confirmation

This will also mean that the team is removed from the schedule for that particular route. The route becomes open so you will not find the team assigned for that route on the Attendance screen.

Attendance

Checked In Routes |
 No Show Routes |
 Open Routes |
 Time Off

1 Record(s) Found

Schedule Date	Route Numbers	Team	Volunteer	Partner Driver
3/27/2017	706A (Location: Spring Valley United Methodist Church)		<input type="button" value="Choose Volunteer"/>	

Moreover, if you try to assign a team for dates that they are on time off, it will show you an error message and will not allow you to assign them.

Attendance

3/27/2017 3/27/2017 Meal Delivery Select Location 706A Get Attendees Reset

Checked In Routes No Show Routes Open Routes Time Off

1 Record(s) Found

Schedule Date	Route Numbers	Team	Volunteer	Partner Driver
3/27/2017	706A (Location: Spring Valley United Methodist Church)	Team Rocket	Assign	



You will be able to review all of your volunteer's scheduled time off by opening your main menu and clicking 'Volunteer Time Off' under Manage Volunteers section.

A screenshot of a software interface's main menu. At the top right, a green square with a white hamburger menu icon is highlighted with a red border. Below it, the menu is divided into two columns. The left column is titled "Manage Volunteers" and contains the following items: "Add Volunteer", "Search Volunteer", "Volunteer Coordinators", "Volunteer Time Off", "Quick Assign and Schedule", "Volunteers", "Mass Schedule Changes", and "Verified Volunteers". A red arrow points to the "Volunteer Time Off" item. The right column is titled "Communication Center" and contains "Communication Templates", "Newsletter", and "Create New". Below that, it has a "Reports" section with "Default Reports" and "Custom Reports".

This page will display the list of volunteers/teams and their time off details. You'll also be able to filter this list by selecting the date range.

Vounteer Time Off

3/27/2017 3/27/2017 Filter Reset

1 Record(s) Found

Volunteer	Email	Date	Reason	
Team Rocket		3/27/2017 - 3/31/2017	No confirmation	Cancel

Canceling Scheduled Time Off

There will be times that you decide to cancel the team's scheduled time off. This can also be done by the admin by clicking on the cancel button found in many places on the team's profile.

Admin can cancel time off from the Volunteer Time Off list.

Vounteer Time Off

3/27/2017 3/27/2017 Filter Reset

1 Record(s) Found

Volunteer	Email	Date	Reason	
Team Rocket		3/27/2017 - 3/31/2017	No confirmation	Cancel

From the team's profile, you can also click on 'View Time Off History' message at the top of the page to open the team's time off history pop up.

UPCOMING VACATION FROM 3/27/2017 TO 3/31/2017 View Time Off History

Team Rocket SCHEDULE TIME OFF PIN - B000004358

Team Type: General Team

Team Captain Details: Jessie James | Email: [redacted]

Team Co-Captain Details: NA

On the pop up, you can click the 'X' button to delete the time off.

Time Off History ⊗

Date	Type	Reason	
3/27/2017 - 3/31/2017	On Hold	No confirmation	⊗

Cancel

You can also cancel from the 'Time Off History' section found at the bottom of the team's page.

Time Off History

Date	Type	Reason	
3/27/2017 - 3/31/2017	On Hold	No confirmation	

Once you cancel, the system will recognize the cancelled schedule/s due to the time off and you'll have the option to reschedule for all or selected open schedules.

Cancel Time Off

Please select below open date to rescheduling.

Action

Meal

- Action
- Cancel Time off and Reschedule for All open opportunity slots
- Cancel Time off and Reschedule for selected open opportunity slots
- Cancel Time off and do not Reschedule open opportunity slots

3/27/2017 3/28/2017 3/29/2017

Once confirmed, you will find that schedules are added back to the team and the time off record is removed from the team's profile.

Attendance

3/27/2017 3/27/2017 Meal Delivery Select Location 706A

Checked In Routes NS No Show Routes O Open Routes TO Time Off

1 Record(s) Found

Schedule Date	Route Numbers	Team	Volunteer	Partner Driver
3/27/2017	706A (Location: Spring Valley United Methodist Church)	Team Rocket		