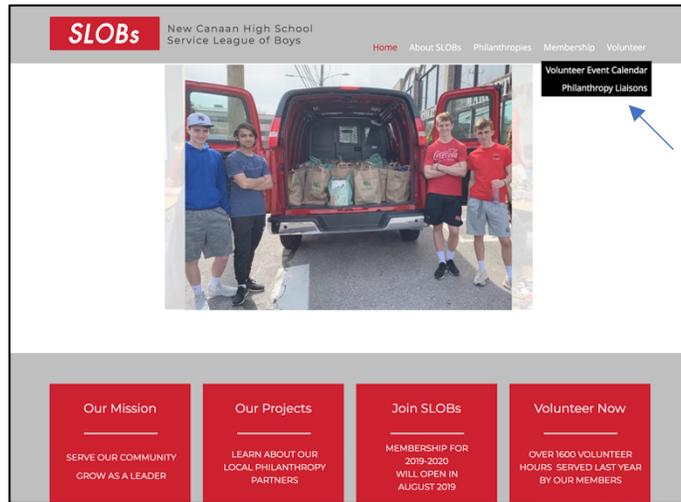


Track it Forward Liaison Instructions (7/21/22)

New Canaan SLOBs utilizes a software program called Track it Forward (TIF) to manage membership, events and track volunteer hours. You access this website by first going to our homepage, www.newcanaanslobs.org, where you can easily navigate to get general information about SLOBs, including helpful Liaison information, without logging in, under the Philanthropy Liaisons tab. In order to use TIF you must log in.



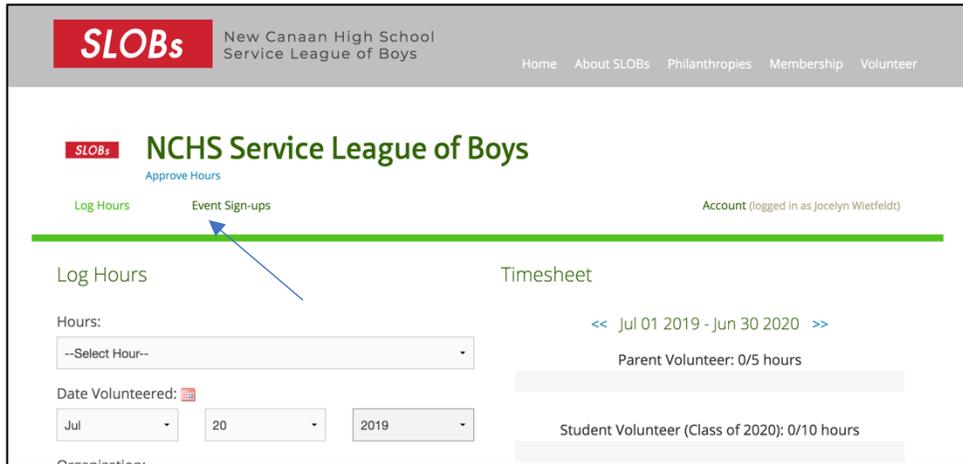
We created Templates for each Philanthropy that you will use to create your events by Duplicating them and Saving them. We pulled details from previous events and loaded them in, **but you will be able to edit them to fit your current needs**. We have also “pre-set” the proper settings in the Templates, cutting out certain steps for you, thus saving you time.

Instructions on the following pages include:

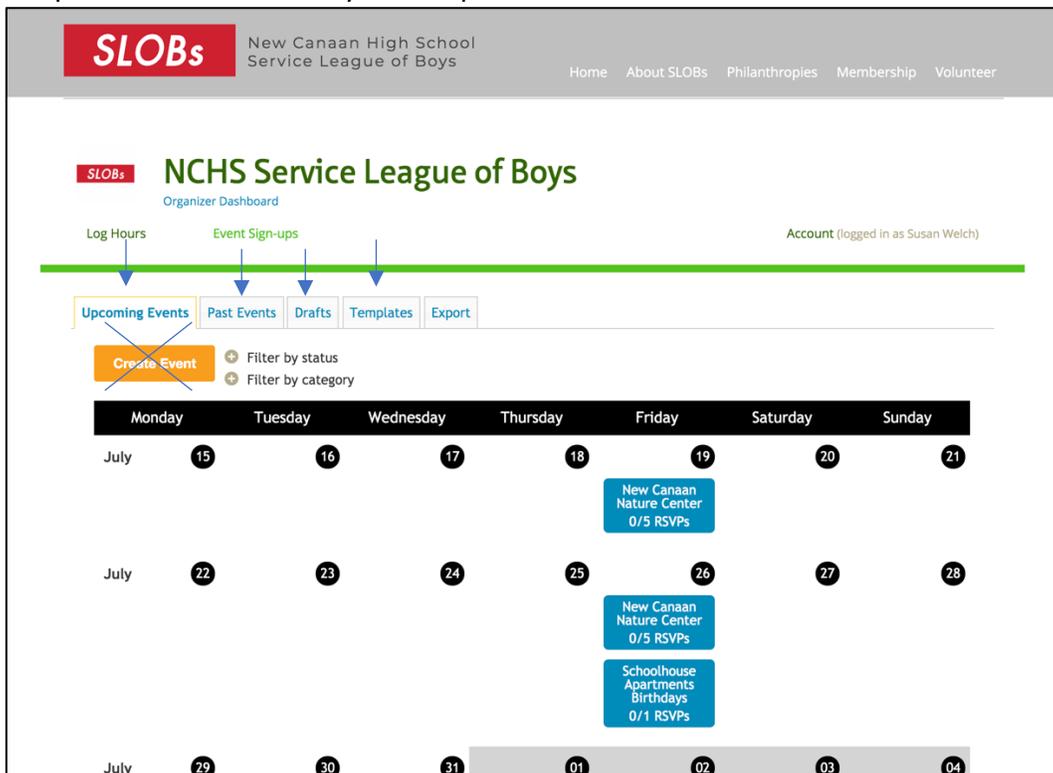
- How to add an Event by Duplicating Templates
- How to Edit Templates (for recurring Events)
- How to Edit events
- How to create “Save the Dates”
- How to add Multiple Events by Duplicating Templates
- How to Approve Hours after an Event
- How to delete a volunteer
- How to email volunteers
- How to access Sign-in sheets

Publishing an Event

1. From the Log Hours screen, click “Event Sign- Ups”



2. This screen shows “Upcoming Events”, but also has your “tool bar” to add, edit and manage your events. It is VERY important that when adding events, you DO NOT click on the orange “Create Event” button. **The main tabs that you will use are Templates, Past Events and Upcoming Events.** We have created Templates for each Philanthropy Event and Philanthropy Donation. All proper settings have already been saved in your templates so there are very few steps.



3. To Publish an event, click on the Template tab and scroll down to find your Philanthropy Event or Philanthropy Donation and click on it. Your template will pull up.

The screenshot shows the SLOBs website interface. At the top, there is a header with the SLOBs logo and the text "New Canaan High School Service League of Boys". Navigation links include "Home", "About SLOBs", "Philanthropies", "Membership", and "Volunteer". Below the header, there are tabs for "Log Hours", "Event Sign-ups", and "Account (logged in as Susan Welch)". A secondary navigation bar contains "Upcoming Events", "Past Events", "Drafts", "Templates" (which is highlighted with a blue box), and "Export". A list of event templates is displayed below, including "Carver Foundation of Norwalk", "ChowdaFest/Food Rescue", "Family & Children's Agency", "Family & Children's Agency Donation", "Filling in the Blanks" (indicated by a blue arrow), "Filling in the Blanks Donation Drive", "Girl Scouts", "Gospel Garden", "Kids in Crisis Donation Drive", "Lee Garden", "Midnight Run", "Midnight Run Donations", "MMRF", "NCHS Beautification", and "NCHS Calendar".

4. From here select "Duplicate".

The screenshot shows the SLOBs website interface for the "Filling in the Blanks" event. The header and navigation are the same as in the previous screenshot. The main content area displays the event title "Filling in the Blanks" and a description: "4 shifts available: 8-10am: Help unload the truck. 10am-12pm, 12-2pm and 2-4pm: Help pack food bags. Filling in the Blanks has moved to 346 Main Ave, Norwalk. Contact Rachel or Kyle McDonald with questions". Below the description, there is a table with one row showing "0" and a "SIGN UP" button. A link "Contact the event organizer, Susie Swindell" is provided. Under the "Manage" section, there are links for "Edit", "Duplicate" (indicated by a blue arrow), and "Bulk Duplicate".

5. **This brings up your Template detail that you will now edit for your specific event.** The fields that you may edit are below. All other fields have been pre-set. Please do not change any other settings.
- Event Title (pre-filled, you may change this)
 - Event Date (add this in)
 - Event Description (pre-filled you may change this)
 - Shift (add this in, if more than 1 shift click “Add more values”)
 - Email preferences

Automatically set the event status to published

Event Title: * ←

Filling in the Blanks

Event Date:
Format: 07/22/2019

←

Event Description: ←

4 shifts available: 8-10am: Help unload the truck. 10am-12pm, 12-2pm and 2-4pm: Help pack food bags. Filling in the Blanks has moved to 346 Main Ave, Norwalk. Contact Rachel or Kyle McDonald with questions

Shift ←

Start Time:	End Time:	Shift Title:	Description:	Volunteers Needed: *
+				Unlimited

Add more values

6. Email Notifications have been pre-set to send you notifications when a member signs up for an event and when one has cancelled their sign up. These notifications can be helpful in keeping you up to date with how much support you are getting for an event and also a heads up when there are last minute cancellations that could have an impact on your event. There are instances where you may want to change these settings. For example, if you have a General Meeting donation event you probably don't want to receive 75 emails notifying you that members are bringing pancake mix! To do this follow the below steps:

Click on “Notifications” towards the bottom of the screen. Then, uncheck which notifications you don’t want to receive. Please DO NOT uncheck “Email volunteer upon signup”!

Event Activity: Add another item
 Select an activity to link this event to. When a volunteer or organizer logs hours, this activity will be selected.
 Schoolhouse Apartments Birthdays

How do you want volunteers to log their hours for this event?:
 Notify volunteers to log their own hours
 Notify organizer to verify and log the volunteer's hours in bulk
 Don't encourage volunteers to log their hours for this event

Require Track it Forward account in order to RSVP?:
If you require Track it Forward accounts, we will prompt the user to login / create an account before RSVP'ing. If you do not require Track it Forward we will prompt them to log in / create an account as give them the option of just leaving their name, phone number, and email.
 Yes
 No

• **Notifications** ←

• Privacy

• Other Settings

Category:

Yes
 No

• **Notifications**

Notifications:

- Email volunteer upon sign up
- Email organizer upon sign up
- Email organizer when volunteer cancels
- Email volunteer 2 days before event
- Email signed-up volunteers if event is deleted

Cancellation Instructions:
 Before your volunteers cancel, they'll be displayed these instructions.

• Privacy

• Other Settings

Save

7. When finished, scroll to the bottom and click on “Save”. You may now click on the Event Sign ups again which will bring you back to “Upcoming Events” and verify that everything is as you want. Please do not edit “Privacy” or “Other Settings”.

Event Activity: Add another item
 Select an activity to link this event to. When a volunteer or organizer logs hours, this activity will be selected.
 Filling in the Blanks

How do you want volunteers to log their hours for this event?: *
 Notify volunteers to log their own hours
 Notify organizer to verify and log the volunteer's hours in bulk
 Don't encourage volunteers to log their hours for this event

Require Track it Forward account in order to RSVP?: *
If you require Track it Forward accounts, we will prompt the user to login / create an account before RSVP'ing. If you do not require Track it Forward we will prompt them to log in / create an account as give them the option of just leaving their name, phone number, and email.
 Yes
 No

• **Notifications**

• ~~Privacy~~

• ~~Other Settings~~

Save

Editing your Template

1. You may decide that you would like to Edit some Template details to better fit your current needs before Duplicating. This can done be when you pull your Template by clicking “Edit” instead of “Duplicate”. It is important that you “Save” your changes. Please do not edit “Privacy” or “Other Settings”.

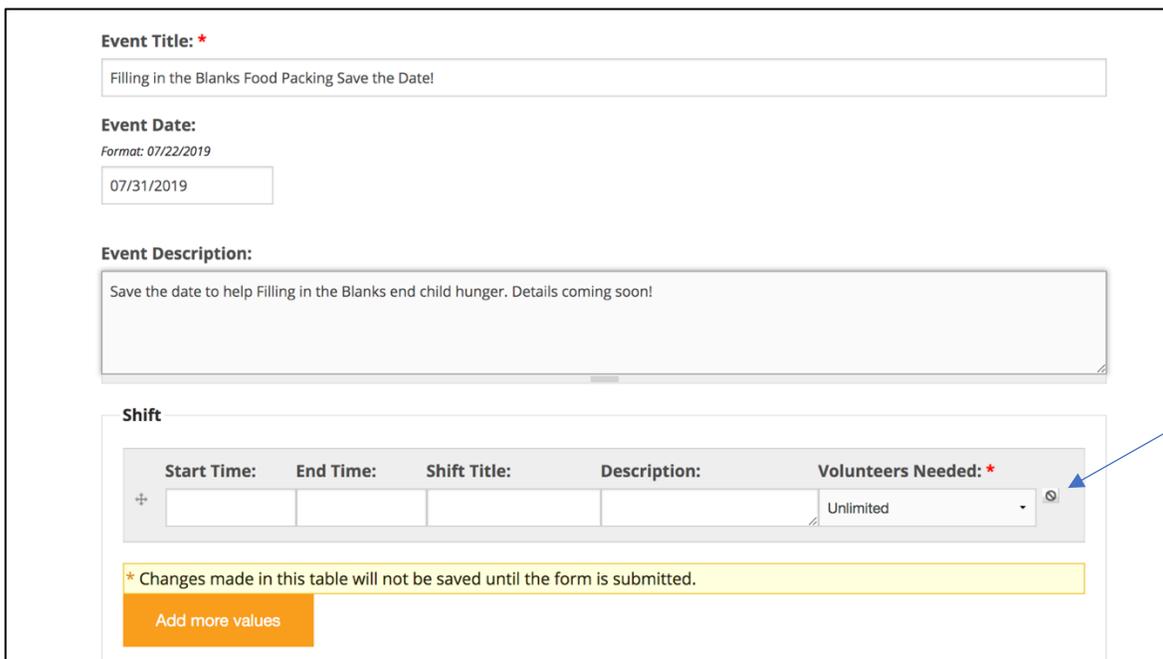
Editing an Event

1. To edit an event: Go to Event Signups>select your event>select Edit>make changes>Save

Save the Dates

Sometimes you may have an event date, but not the details such as shift times and job descriptions. In these cases, please enter the events in as “Save the Dates” so that our members can plan accordingly to participate.

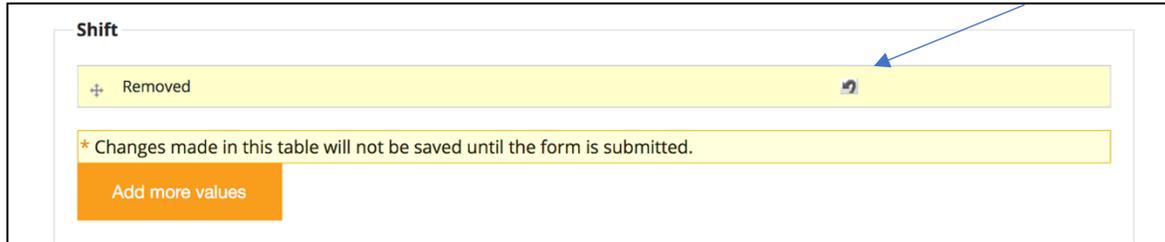
1. To publish a “Save the Date”, follow steps 1-6 from “Adding an Event” with the following changes:
 - a. In the Event Title, add “Save the Date” after the title.
 - b. Under “Shift” click on the circle with the line through it. This disables the volunteer requirement.
 - c. Save as usual



The screenshot shows a form for creating an event. The 'Event Title' field contains 'Filling in the Blanks Food Packing Save the Date!'. The 'Event Date' field contains '07/31/2019'. The 'Event Description' field contains 'Save the date to help Filling in the Blanks end child hunger. Details coming soon!'. The 'Shift' section contains a table with columns for Start Time, End Time, Shift Title, Description, and Volunteers Needed. The 'Volunteers Needed' dropdown menu is set to 'Unlimited' and is disabled, indicated by a blue arrow pointing to a greyed-out circle with a diagonal line through it. A yellow warning message states: '* Changes made in this table will not be saved until the form is submitted.' Below the table is an orange button labeled 'Add more values'.

Start Time:	End Time:	Shift Title:	Description:	Volunteers Needed: *
+				Unlimited

When ready to add all details of your Save the Date follow the steps to Edit your event, changing your title and description. To add in your Shifts, click the reversed arrow. The shift box will appear for you to enter.

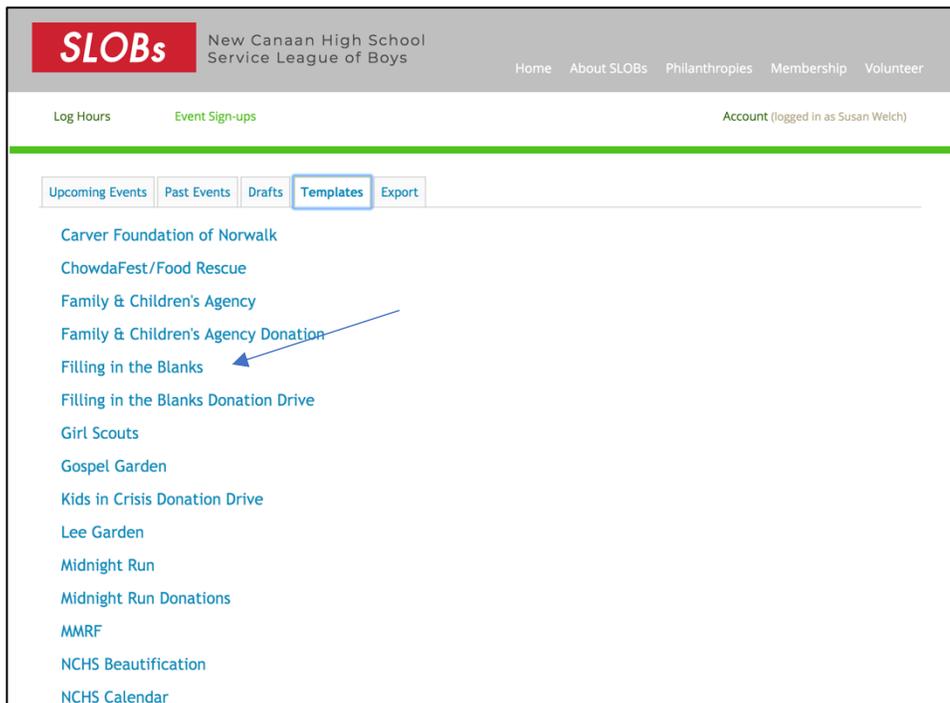


The screenshot shows a 'Shift' table with a yellow background. At the top left, there is a plus sign icon and the text 'Removed'. At the top right, there is a reversed arrow icon. Below the table, there is a yellow warning box that says '* Changes made in this table will not be saved until the form is submitted.' and an orange button that says 'Add more values'.

Duplicating Multiple Events (Bulk Duplicating)

Please use this feature wisely. You cannot edit multiple events so if there is a mistake or general change, you have to go back to each calendar event duplication to correct.

1. Once logged in, go to Event Sign-Ups
2. Click on the Template tab and scroll down to find your Philanthropy Event or Philanthropy Donation and click on it. Your template will pull up.



The screenshot shows the SLOBs website interface. The header includes the SLOBs logo, 'New Canaan High School Service League of Boys', and navigation links: Home, About SLOBs, Philanthropies, Membership, Volunteer. The main navigation bar has 'Log Hours', 'Event Sign-ups', and 'Account (logged in as Susan Welch)'. Below this, there are tabs for 'Upcoming Events', 'Past Events', 'Drafts', 'Templates', and 'Export'. The 'Templates' tab is selected and highlighted. A list of event templates is displayed, including 'Carver Foundation of Norwalk', 'ChowdaFest/Food Rescue', 'Family & Children's Agency', 'Family & Children's Agency Donation', 'Filling in the Blanks', 'Filling in the Blanks Donation Drive', 'Girl Scouts', 'Gospel Garden', 'Kids in Crisis Donation Drive', 'Lee Garden', 'Midnight Run', 'Midnight Run Donations', 'MMRF', 'NCHS Beautification', and 'NCHS Calendar'. A blue arrow points to the 'Filling in the Blanks' template.

3. From here select “Bulk Duplicate”.

SLOBs New Canaan High School Service League of Boys

Home About SLOBs Philanthropies Membership Volunteer

Log Hours Event Sign-ups Account (logged in as Susan Welch)

Filling in the Blanks

4 shifts available: 8-10am: Help unload the truck. 10am-12pm, 12-2pm and 2-4pm: Help pack food bags. Filling in the Blanks has moved to 346 Main Ave, Norwalk. Contact Rachel or Kyle McDonald with questions

0 [SIGN UP](#)

[Contact the event organizer, Susie Swindell](#)

Manage

- [Edit](#)
- [Duplicate](#)
- [Bulk Duplicate](#)

4. Fill out the form according to your details and click Preview

Bulk Duplicate Your Event

On which days of the week would you like to duplicate this event on?: *

- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday
- Sunday

How often do you want to duplicate this event?: *

Weekly

From which date do you want to start duplicating on?: *

You can only duplicate at max 6 months from today.
Format: 07/22/2019

07/23/2019

To which date you would like to duplicate until?: *

You can only duplicate at max 6 months from today.
Format: 07/22/2019

08/27/2019

[Preview](#)

5. Review the Preview screen and select “Duplicate” if ready to publish or “Back” to make changes.

Organizer Dashboard

Log Hours Event Sign-ups

Account (logged in as Susan Welch)

Bulk Duplicate Your Event

Note: Duplicating events and are not like traditional recurring events. You cannot make a change to one and impact all the other ones. After duplicating this event, if you want to change it or delete it, you will need to it one by one.

11 events will be created

- Tuesday, 07/23/2019
- Thursday, 07/25/2019
- Tuesday, 07/30/2019
- Thursday, 08/01/2019
- Tuesday, 08/06/2019
- Thursday, 08/08/2019
- Tuesday, 08/13/2019
- Thursday, 08/15/2019
- Tuesday, 08/20/2019
- Thursday, 08/22/2019
- Tuesday, 08/27/2019

[Back](#) [Duplicate](#)

Log Volunteer Hours for your Event

We would like for Volunteer Hours to be approved within 48 hours of your event. If you have recurring/multiple Events during the week, please approve them by each Sunday evening.

Log hours via the Past Events tab. This is the only way you are able to verify hours.

To Log Volunteer Hours:

1. Go to Events Calendar (NOT Approve Hours)
2. Click on Past Events tab> Click the blue Verify button next to the event
3. Confirm submissions (edit as required) and click Log Hours. Deleting “no shows” is not done here. Refer to “Delete a Volunteer” directions next.
4. Volunteer receives email notification and hours registered on their Timesheet

SLOBs NCHS Service League of Boys

Approve Hours

Log Hours Event Sign-ups

Upcoming Events Past Events Drafts Templates

Create Event Filter by status Filter by category

Monday Tuesday Wednesday Thursday Friday Saturday

September 02 03 04 05 06

NCHS Library After School Clean Up Community Addiction Awareness Vigil Sports

Upcoming Events Past Events Drafts Templates

Filter by state: Log Hours Attended / Logged Not Attended

Tuesday, September 3, 2019
 NCHS Library After School Clean Up
 Red Cross
 Red Cross Donations

Monday, September 2, 2019
 Labor Day

Saturday, August 31, 2019
 Schoolhouse Apartments Birthdays

Thursday, August 29, 2019
 First Day of School

Tuesday, August 27, 2019
 Hang Ribbons in Town to Advertise for Community Addiction Awareness Vigil
 New Canaan Food Pantry

Verify
 2/8 shifts logged

Verify Hours for New Canaan Food Pantry

1. Verify Hours

Review the volunteer's hours to make sure the totals are correct. You can change them or zero them out. After you submit them, the volunteer will be notified of the submission.

unsubmitted hours submitted hours submitted hours pending approval

Hours	Shift	Name
1.5	8:45am - 10:15am	Carolyn Corcoran + Logged 1.5 hours around Aug 27 2019
1.5	8:45am - 10:15am	Charlie Corcoran + Logged 1.5 hours around Aug 27 2019
1.5	8:45am - 10:15am	Charlie Mehos + Logged 2.5 hours around Aug 27 2019
1.5	8:45am - 10:15am	Meg Mehos + Logged 1.5 hours around Aug 27 2019

2. Set Defaults

Organization:
 New Canaan Food Pantry

Date Volunteered:
 Format: 09/04/2019
 08/27/2019

Notes:

Log Hours

Delete a Volunteer

You can delete volunteers via the Upcoming Events tab and Past Events tab by clicking on the event in blue letters. This is for double sign ups, incorrect sign ups and no shows.

Upcoming Events **Past Events** Drafts Templates Export

Filter by state: Completed Verify Log Hours Attended / Logged Not Attended

Sunday, October 20, 2019
 YMCA: Family Fun Obstacle Run Verify
0/9 shifts logged

Saturday, October 19, 2019
 SAXE 5th and 6th Grade Frozen Jr. set building and art projects
 Sports Buddies Completed
All 1 shifts logged

Monday, October 14, 2019
 NCHS Library After School Clean Up Weekly Opportunities

Sunday, October 13, 2019
 Staying Put in New Canaan-Patio Furniture Storage Completed
All 11 shifts logged

Then click on the “+” sign which will pull up your volunteer list, then click on the corresponding name you want to delete.

YMCA: Family Fun Obstacle Run

Sunday, October 20 2019

This event is bound to be a blast! The Y's Family Fun Obstacle Run will provide many great opportunities for volunteers. Please complete the attached volunteer waiver form and bring it with you if this is your first YMCA event this year. Contact Aidan Smith (smith06840@gmail.com) or Darcy Smith with any questions.

Attachments
[YMCA Volunteer Waiver.pdf](#)

9:00am - 11:00am	+	Event set-up	+	1 / 20	SIGN UP
11:15am - 2:30pm	+	Man obstacle stations	+	3 / 20	SIGN UP
2:15pm - 4:00pm		Clean up	+	5 / 15	SIGN UP

New Canaan High... New Canaan FC Trademark/Service... Au jasonmcdonaldesi... We MOVED TO...

YMCA: Family Fun Obstacle Run

Sunday, October 20 2019

This event is bound to be a blast! The Y's Family Fun Obstacle Run will provide many great opportunities for volunteers. Please complete the attached volunteer waiver form and bring it with you if this is your first YMCA event this year. Contact Aidan Smith (smith06840@gmail.com) or Darcy Smith with any questions.

Attachments
[YMCA Volunteer Waiver.pdf](#)

9:00am - 11:00am	+	Event set-up	+	1 / 20	SIGN UP
11:15am - 2:30pm	+	Man obstacle stations	-	3 / 20	SIGN UP
				Callum Wood	✖
				Damian Zaorski	✖
				Reid Brown	✖
2:15pm - 4:00pm		Clean up	+	5 / 15	SIGN UP

Contact the event organizer, [Darcy Smith](#)

Manage	Volunteers	Print
Edit	Invite	Roster
Duplicate	Email Attendees	Sign-In Sheet
Bulk Duplicate	Verify Hours	Export

How to Email Volunteers

You can email the entire group via Upcoming Events and Past Events. Click on the event in blue lettering. And select Email Attendees.

YMCA: Family Fun Obstacle Run
 Sunday, October 20 2019

This event is bound to be a blast! The Y's Family Fun Obstacle Run will provide many great opportunities for volunteers. Please complete the attached volunteer waiver form and bring it with you if this is your first YMCA event this year. Contact Aidan Smith (smith06840@gmail.com) or Darcy Smith with any questions.

Attachments
[YMCA Volunteer Waiver.pdf](#)

9:00am - 11:00am	Event set-up	1 / 20	SIGN UP
11:15am - 2:30pm	Man obstacle stations	3 / 20	SIGN UP
2:15pm - 4:00pm	Clean up	5 / 15	SIGN UP

[Contact the event organizer, Darcy Smith](#)

Manage	Volunteers	Print
Edit	Invite	Roster ←
Duplicate	Email Attendees	Sign-In Sheet
Bulk Duplicate	Verify Hours	Export

To email an individual, click on the Roster which will pull up the names and email addresses of all volunteers. Here, you can copy and paste the individual's email address you need to contact.

Roster of Volunteers

YMCA: Family Fun Obstacle Run

Sunday, October 20 2019

Time	Shift	Sign Ups	Name	Email	Phone	Message
9:00am - 11:00am	Event set-up	1 / 20	Cooper Growney	Coopergrowney@icloud.com		
11:15am - 2:30pm	Man obstacle stations	3 / 20	Callum Wood	callum.wood@ncps-k12.org		
" "			Damian Zaorski	damianzaorski27@gmail.com		
" "			Reid Brown	reidbrown10@yahoo.com		
2:15pm - 4:00pm	Clean up	5 / 15	Ben Apicella	Ben.apicella@ncps-k12.org		
" "			Connor Finnigan	connor.finnigan@ncps-k12.org		Connor Finnigan
" "			Connor Ho	connormho@icloud.com		
" "			Daniel Chesney	daniel.chesney@ncps-k12.org		
" "			Grant Pittaro	grant.pittaro@ncps-k12.org		

Sign-in Sheet

You can print a sign in sheet by selecting Sign-In Sheet.

YMCA: Family Fun Obstacle Run
 Sunday, October 20 2019

This event is bound to be a blast! The Y's Family Fun Obstacle Run will provide many great opportunities for volunteers. Please complete the attached volunteer waiver form and bring it with you if this is your first YMCA event this year. Contact Aidan Smith (smith06840@gmail.com) or Darcy Smith with any questions.

Attachments
[YMCA Volunteer Waiver.pdf](#)

9:00am - 11:00am	+ Event set-up	+ 1 / 20	SIGN UP
11:15am - 2:30pm	+ Man obstacle stations	+ 3 / 20	SIGN UP
2:15pm - 4:00pm	Clean up	+ 5 / 15	SIGN UP

[Contact the event organizer, Darcy Smith](#)

Manage	Volunteers	Print
Edit	Invite	Roster
Duplicate	Email Attendees	Sign-In Sheet
Bulk Duplicate	Verify Hours	Export

Sign In Sheet

YMCA: Family Fun Obstacle Run

Sunday, October 20 2019

Time	Shift	Name	Time In	Time Out
9:00am - 11:00am	Event set-up	Cooper Growney*		
9:00am - 11:00am	Event set-up			
9:00am - 11:00am	Event set-up			
9:00am - 11:00am	Event set-up			
9:00am - 11:00am	Event set-up			
9:00am - 11:00am	Event set-up			
9:00am - 11:00am	Event set-up			
9:00am - 11:00am	Event set-up			
9:00am - 11:00am	Event set-up			
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9:00am - 11:00am	Event set-up			
9:00am - 11:00am	Event set-up			
9:00am - 11:00am	Event set-up			
9:00am - 11:00am	Event set-up			
11:15am - 2:30pm	Man obstacle stations	Callum Wood*		
" "		Damian Zaorski*		

