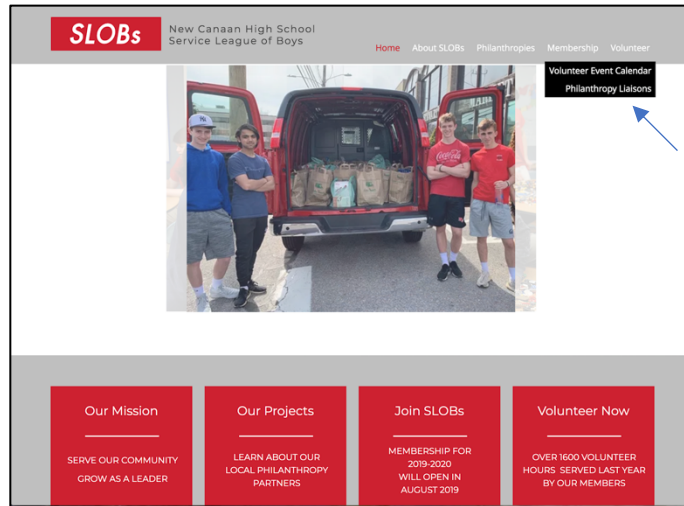


Track it Forward Liaison Instructions (7/21/22)

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

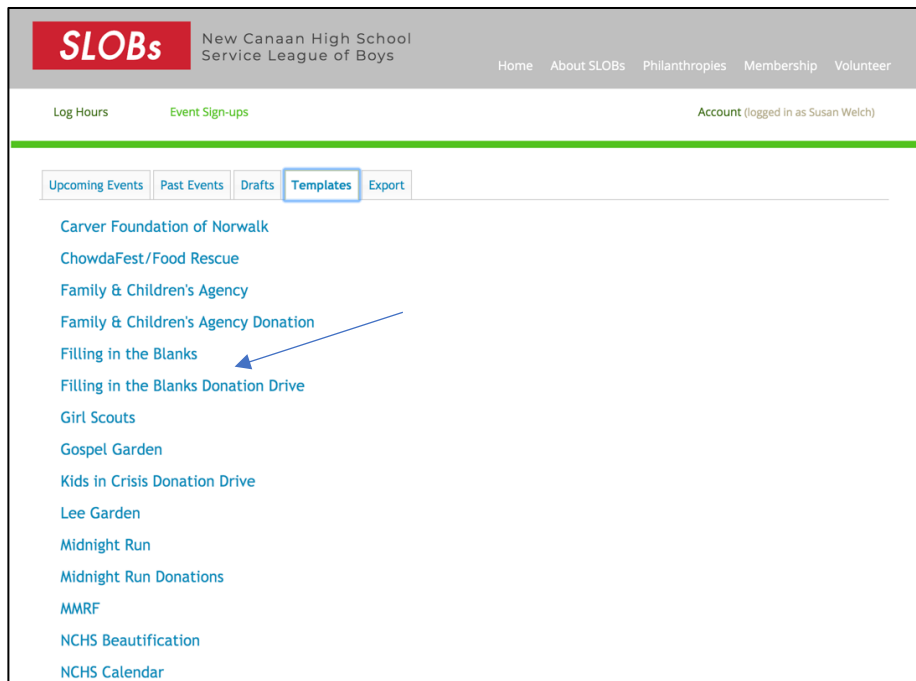
1. From the Log Hours screen, click “Event Sign- Ups”

The screenshot shows the SLOBs website for New Canaan High School Service League of Boys. The user is logged in as Jocelyn Wiefeldt. The main navigation bar includes links for Home, About SLOBs, Philanthropies, Membership, and Volunteer. The main content area has a green header with 'SLOBs' and 'NCHS Service League of Boys'. Below this, there are links for 'Log Hours' and 'Event Sign-ups'. A blue arrow points to the 'Event Sign-ups' link. The 'Log Hours' section includes a 'Timesheet' table with columns for 'Hours' and 'Date Volunteered'. The 'Hours' column has a dropdown menu with '--Select Hour--'. The 'Date Volunteered' column has a date picker set to July 20, 2019. The 'Timesheet' table shows 'Parent Volunteer: 0/5 hours' and 'Student Volunteer (Class of 2020): 0/10 hours'.

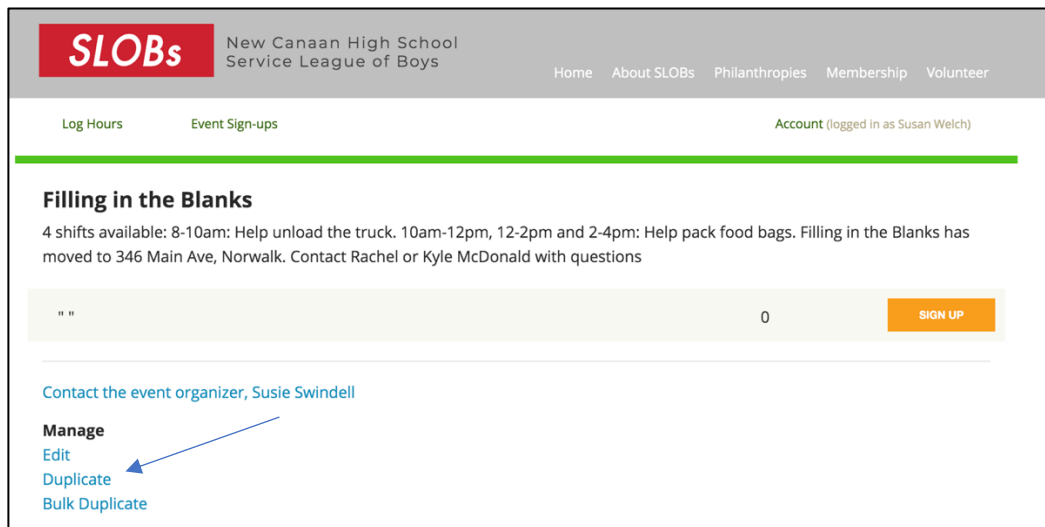
2. This screen shows “Upcoming Events”, but also has your “tool bar” to add, edit and manage your events. It is VERY important that when adding events, you DO NOT click on the orange “Create Event” button. **The main tabs that you will use are Templates, Past Events and Upcoming Events.** We have created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

The screenshot shows the SLOBs website for New Canaan High School Service League of Boys. The user is logged in as Susan Welch. The main navigation bar includes links for Home, About SLOBs, Philanthropies, Membership, and Volunteer. The main content area has a green header with 'SLOBs' and 'NCHS Service League of Boys'. Below this, there are links for 'Log Hours' and 'Event Sign-ups'. The 'Event Sign-ups' section has a toolbar with buttons for 'Upcoming Events', 'Past Events', 'Drafts', 'Templates', and 'Export'. The 'Upcoming Events' button is highlighted with a blue arrow. Below the toolbar, there is a 'Create Event' button (orange) and a 'Filter by status' button (plus icon). Below the 'Create Event' button, there is a calendar view showing events for July. The calendar has columns for Monday through Sunday. Events are listed for July 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29, 30, 31, 01, 02, 03, and 04. Events include 'New Canaan Nature Center 0/5 RSVPs' and 'Schoolhouse Apartments Birthdays 0/1 RSVPs'. A blue arrow points to the 'Create Event' button.

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.





4. From here select "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: * 

Event Date:
Format: 07/22/2019
 

Event Description: 

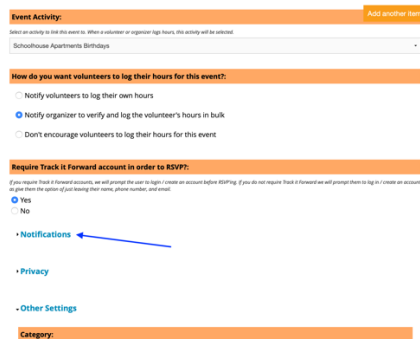
Shift 

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

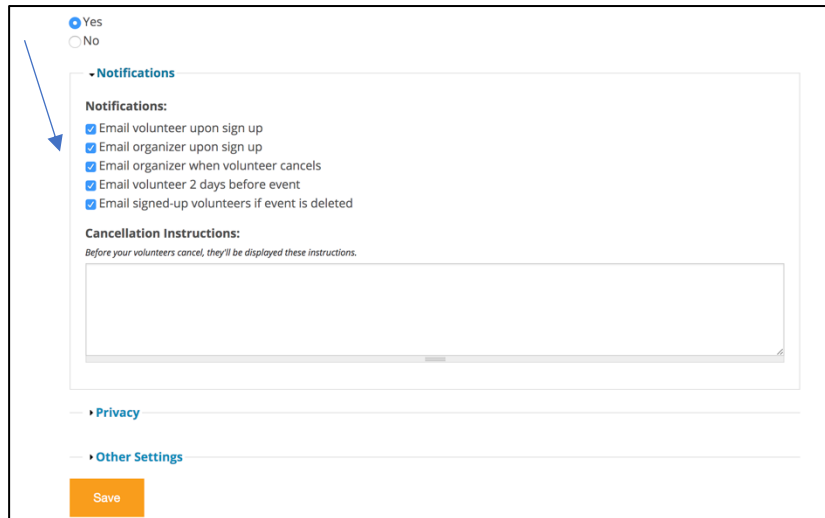
Require Track It Forward account in order to RSVP?:
If you require Track It Forward accounts, we will prompt the user to login / create an account before RSVP'ing. If you do not require Track It Forward we will prompt them to log in / create an account as give them the option of just leaving their name, 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

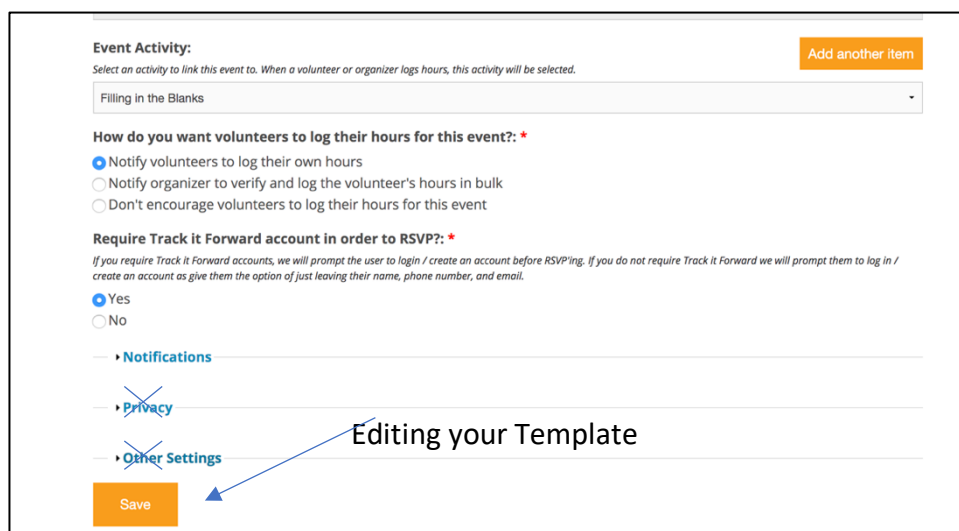
Cancellation Instructions:
 Before your volunteers cancel, they'll be displayed these instructions.

→ Privacy

→ Other Settings

Save

- 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 be done 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

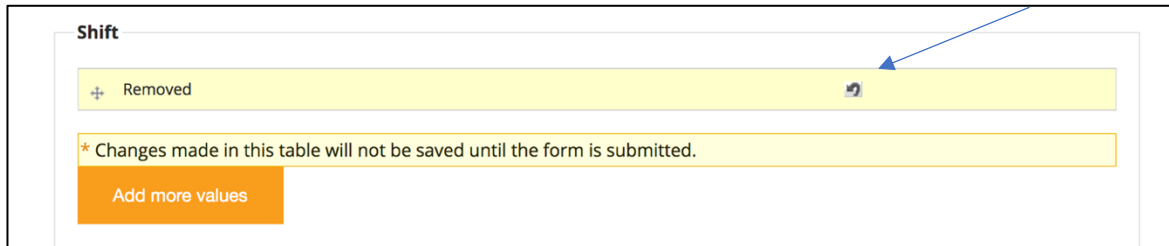
Sometimes you may have an event date, but not the details such as shift times and job descriptions. In these cases, please enter the events in as “Save the Dates” so that our members can plan accordingly to participate.

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

Start Time:	End Time:	Shift Title:	Description:	Volunteers Needed: *
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	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.



Shift

+	Removed	
---	---------	--

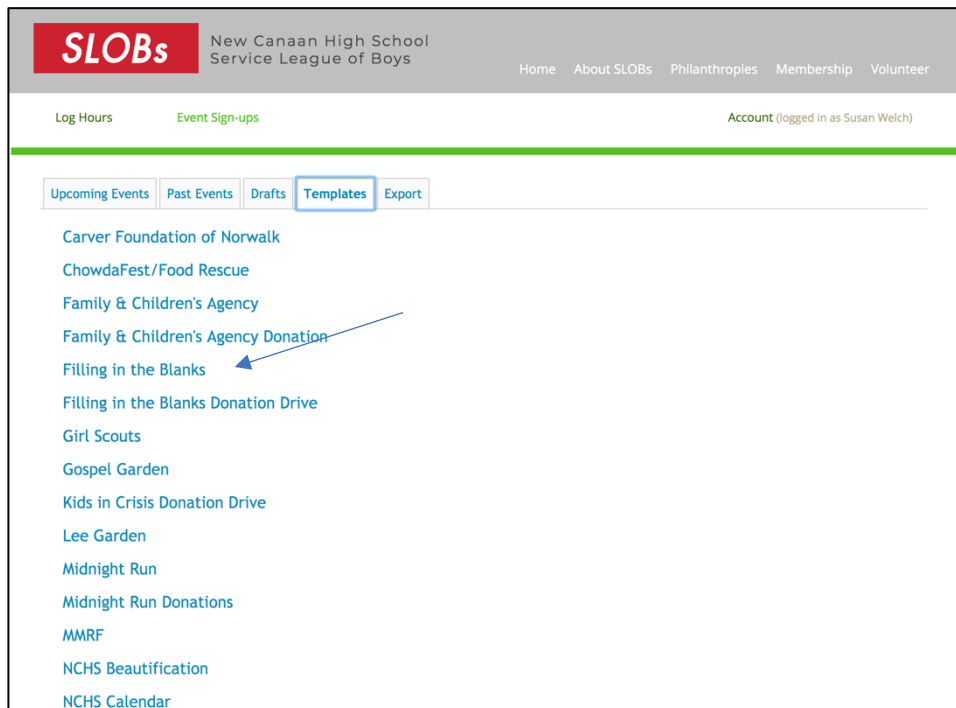
* Changes made in this table will not be saved until the form is submitted.

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.



SLOBs New Canaan High School Service League of Boys

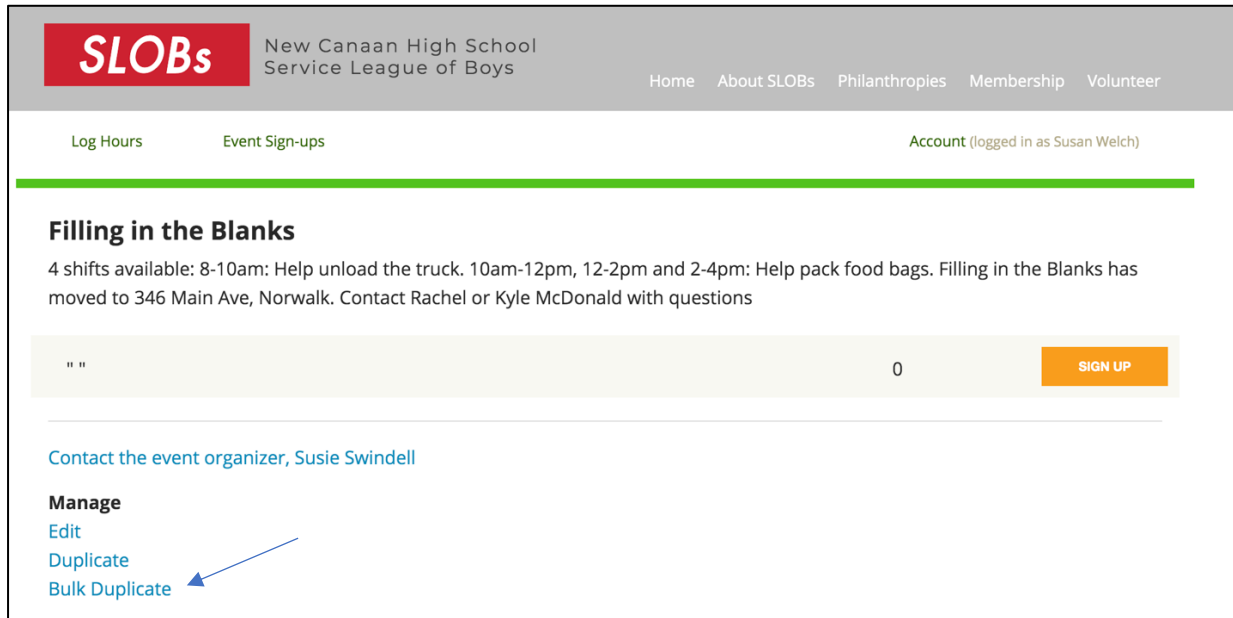
Home About SLOBs Philanthropies Membership Volunteer

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

Upcoming Events Past Events Drafts **Templates** Export

- 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
- NCHS Calendar

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

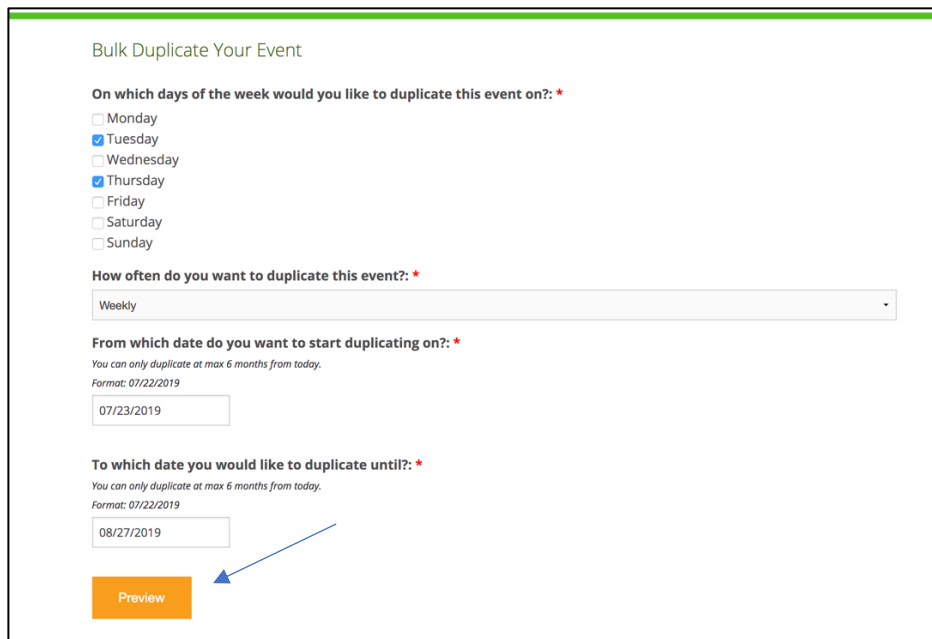
0 SIGN UP

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 HoursEvent Sign-upsAccount (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	<div>Carolyn Corcoran</div> <div>Logged 1.5 hours around Aug 27 2019</div>
1.5	8:45am - 10:15am	<div>Charlie Corcoran</div> <div>Logged 1.5 hours around Aug 27 2019</div>
1.5	8:45am - 10:15am	<div>Charlie Mehos</div> <div>Logged 2.5 hours around Aug 27 2019</div>
1.5	8:45am - 10:15am	<div>Meg Mehos</div> <div>Logged 1.5 hours around Aug 27 2019</div>

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

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

Volunteers
[Invite](#)
[Email Attendees](#)
[Verify Hours](#)

Print
[Roster](#)
[Sign-In Sheet](#)
[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
[Edit](#)
[Duplicate](#)
[Bulk Duplicate](#)

Volunteers
[Invite](#)
[Email Attendees](#)
[Verify Hours](#)

Print
[Roster](#)
[Sign-In Sheet](#)
[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			
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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			
9:00am - 11:00am	Event set-up			
11:15am - 2:30pm	Man obstacle stations	Callum Wood*		
" "		Damian Zaorski*		

