

The Online Reporting System for AmeriCorps Programs

# **Site Supervisor Tutorial**

OnCorps Reports 2.0, Standard Reports

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## Welcome to OnCorps Reports

OnCorps Reports is a web based application that is intended to help AmeriCorps programs gather the data they need to meet their reporting requirements. In OnCorps you will find an audit tested AmeriCorps Member timesheet system, reporting tools that let you gather data from the bottom up, financial forms, and many other features.

This manual is intended to provide detailed instructions on how to use the tools in OnCorps Reports. We hope you will find this a useful resource. If you still have questions about OnCorps Reports after reading this manual, or if you notice a bug in OnCorps Reports, please feel free to e-mail us at <u>help@oncorpsreports.com</u>, and we will be happy to assist you. For questions about when reports are due and what data should be included in reports, please consult with your program staff.

You can find information about upcoming features, scheduled maintenance to OnCorps, and trainings for program directors or state commission staff at <a href="http://www.oncorpsreports.com">http://www.oncorpsreports.com</a>.

## **Getting Started**

In the Getting Started section, you can find information about logging in and out of OnCorps reports, accessing the program web site and resources page, exporting data, and other general features in OnCorps Reports.

### **Getting Started Pages**

System Requirements Logging Into and Logging Out of OnCorps Reports Program Web Site and Resources Page Page Tools Bar Export Report Data Other Features

### **System Requirements**

#### **Getting Started > System Requirements**

OnCorps Reports is an online reporting system and requires an Internet connection and an Internet browser. OnCorps Reports works best in the Microsoft Internet Explorer Internet browser. It will also work in the Mozilla Firefox browser, and Apple's Safari browser, but some exported reports may not display correctly. If you do not have any of these browsers installed on your computer, you can download them for free from the following sites.

Microsoft Internet Explorer: <u>http://www.microsoft.com/windows/products/winfamily/ie/</u> Mozilla Firefox: <u>http://www.mozilla.com/</u> Apple's Safari: http:// www.apple.com/safari/download/

Many of the reports produced by OnCorps Reports are offered in multiple formats for your convenience. Reports can be saved as PDF files, Microsoft Excel or CSV (comma delimited) spreadsheet files, XML and Web files, and TIFF images. If you do not have programs to open these types of files, you can find links to free programs for download below.

PDF Files: Adobe Acrobat Reader: <u>http://www.adobe.com/</u> Spreadsheet Files: OpenOffice.org: <u>http://www.openoffice.org/</u> XML and Web Files: Microsoft Internet Explorer or Mozilla Firefox (see above) TIFF Images: FastStone Image Viewer (Windows): <u>http://www.faststone.org/</u> ViewIt (Mac OS X): http://www.hexcat.com/viewit/index.html

All of these programs can also be downloaded for free from CNet Download.com at <a href="http://www.download.com/">http://www.download.com/</a>

Most reports are available as downloadable files ONLY for Program Directors and State Commission Staff, but Members and Supervisors can view reports on screen. To print on screen reports, use the Create PDF or Save and Print buttons to create a PDF of the screen you are looking at.

## Logging Into and Logging Out of OnCorps Reports

### Getting Started > Logging In and Logging Out of OnCorps Reports

Logging Into OnCorps Reports

You can access OnCorps Reports via a custom URL your program director will share with you.

In order to log in to OnCorps Reports, you must select a program year from the drop down box on the right of the page and click the *Submit* button. Because the data for each program year is stored in a separate database, if you select the wrong program year, your login will not work. The "ARRA 2009-2010 PY" program year option refers to programs that are funded by the Recovery Act. If you do not know what your program year is, contact your program director.



Once you have selected the program year, the portal for all of the AmeriCorps programs in your state for the selected program year will open.

All state commission staff, program directors, regional coordinators (where applicable), site supervisors, and members will use the same statewide portal to enter OnCorps Reports.

Find your program in the list of Participating Programs, which is organized alphabetically.

Then click on the Site Supervisors link under your program to open your login page. If you click on any of the other links for different user types, such as Program Directors or Site Supervisors, your login will not work.



On the login page, enter your login name and password in the box on the right side of the page and click the *Login* button.

OnCorps Reports Test Program	WEB SITE Rep On task. On time	
WEB SITE RESOURCES		
Test         Testing 123456789         La La La         Welcome to the Demo Test Program         On Corpose         On task. On time. Online.         Welcome to the Demo Test Program!		Login to OnCorps Reports OnCorps Reports On task. On time. Online. Username: Password: Login
Place feel free to look eround         Vi         Login to OnCorps Reports         OnCorps         Reports™         On task. On time. Online.	t Test Test Test Test Test Test Test T t Test Test Test Test Test Test Test T Test Test Test Test Test Test Test Test	est login name and password will be e-mailed to you.
Username:	orps Reports™ 2009	
membertest Password: Login Forgot your password? Enter your e-mail address below and your login name and password will be e-mailed to you.	e-mail address i password? and password will be you enter in the	ow your password, enter your n the box below <i>Forgot your</i> your login name and e e-mailed to you. Make sure e-mail address that is your AmeriCorps program. If
Email:	please contact y You do not need	a login name and password, your program director. d to login to see the Program purces Page. Buttons for
	these pages car	be found in the upper right the blue bar. You can learn

more about these pages in the Getting Started > Program Web Site and Resource Page section of this tutorial.

After you login for the first time, you will be prompted to change your password for security reasons. Please record your new password in a secure location for future entry into the OnCorps Reports system.

Home > Change Password
Your password has expired. Please enter your new password below.
New Password:
Verify Password:
Save

Logging Out of OnCorps Reports

To log out of OnCorps Reports, click on the *logout* link at the end of the first line of the header in the upper right corner. This will take you back to the page where you choose your program year. Be sure to logout of OnCorps Reports when you are done to protect the information in the system. Also, if someone else will be logging into OnCorps Reports on the same computer after you are done, logging out will help prevent login problems as it will clear out your login information from the cookies OnCorps Reports uses to keep you logged in during your session.



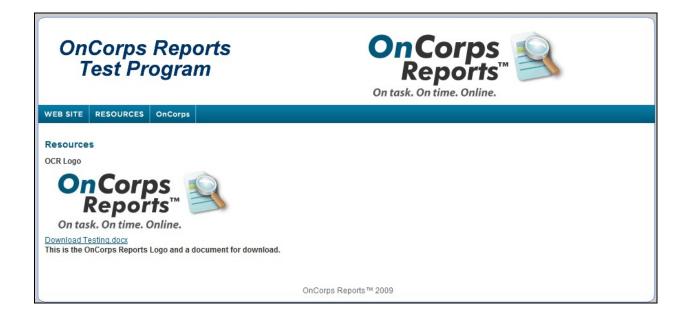
### **Program Web Site and Resources Page**

### Getting Started > Program Web Site and Resources Page

While the majority of the content in OnCorps Reports requires users to login to access, there are two pages, the Program Web Site and Resources Page, that users can access after clicking the link for their user level on the page listing all of the programs in a state. You can also access these pages after you have logged in to OnCorps Reports through the Program Web Site and Resources Page links at the bottom of each page. Once you are on either the Program Web Site or Resources Page, you can switch back and forth between them using the *Web Site* and *Resources* buttons on the menu bar. To return to OnCorps Reports if you have already logged in, click on the *OnCorps* button on the menu bar and you will return to your Home page.



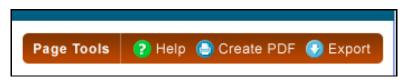
Both the Program Web Site and the Resources Page contain content created either by your program directors or state commission staff. On the Program Web Site, you are likely to see reminders for important events, service stories, and other information relating to your program. On the Resources Page, you can download files, including documents and images.



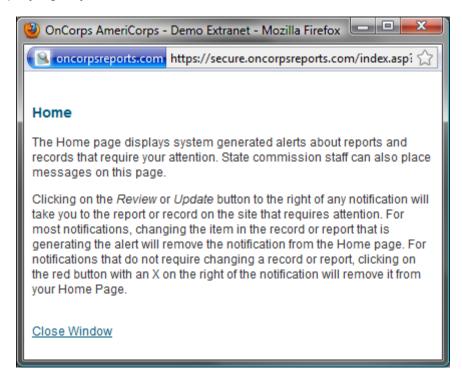
### **Page Tools Bar**

### **Getting Started > Page Tools Bar**

The Page Tools bar is the orange bar that appears on every page below the Help button on the blue main menu bar. The Page Tools bar contains three buttons: *Help*, *Create PDF*, and *Export*.



The *Help* button will open a pop-up window that gives help information about the page currently displaying in your browser.



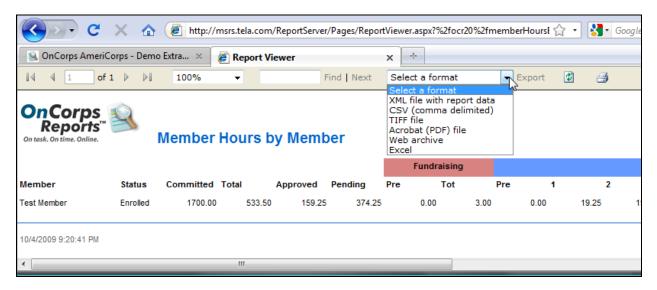
The *Create PDF* button will create a PDF document of the page currently loaded in the browser. You can only create PDF files of pages using this button if you cannot enter data on that page. On pages with forms where you can enter data, you can create a PDF file using the *Save and Print* button on that page.

The *Export* button only appears for certain reports. The *Export* button means you can export the data in the report to a file that can be saved to your computer. See the Getting Started > Exporting Report Data section of this tutorial for details about how to export data.

### **Export Report Data**

### **Getting Started > Export Report Data**

If you see the *Export* button appear on the Page Tools bar (the orange bar below the *Help* menu), then you can export the data in the report to a file that can be saved to your computer. When you click on the *Export* button, a new window or tab will open (depending on your browser) that will load the data to be exported. For some reports, the export report contains more data than is shown in the main OnCorps Reports interface because there is too much data to fit on that screen. The export reports page displays best in Internet Explorer, but it will work in all browsers.



Once the export report has loaded, you can select the format to export the data in using the drop down menu at the top of the page. The formats available for export are listed below:

XML file with report data CSV (comma delimited) TIFF file (image file) Acrobat (PDF) file Web archive Excel

Select the format you want the data to be saved as. Then click the *Export* link to the right of the drop down menu. Your report will then be available to save to your computer.



## **Other Features**

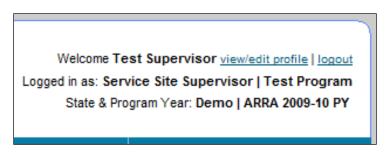
### **Getting Started > Other Features**

In this section, we will be going over some of the other features that you can find on many pages in OnCorps Reports.

#### Header

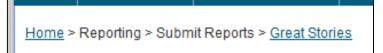
The header in the upper left corner of every page in OnCorps Reports contains important information and links, including the link to log out of OnCorps Reports. The first line of the header, welcomes you to OnCorps Reports and contains a link to the My Profile page, which can also be found under the Directories menu, where you can

change your contact information and password. Also on the first line is the link to log out of OnCorps Reports. The second line of the header tells you what user level you are logged in as and your program name. The final line of the header tells you your state and program year.



#### **Breadcrumbs**

Breadcrumbs are a navigation aid that gives users a way to keep track of their location within a website. In OnCorps Reports, the



breadcrumbs are located just below the *Home* button on the main menu bar. The breadcrumbs will show which menus you navigated through to get to your current page. For example, the breadcrumb Home > Reporting > Submit Reports > Great Stories illustrates that you had to go to the Reporting menu and select the Submit Reports submenu underneath Reporting to get to Great Stories, your current page.

#### **Table Sorting**

Many of the tables in OnCorps Reports allow you to sort the contents of that table by clicking on the column heading. You can tell if a table has sortable column headings if, when you move your mouse over the column headings, the column headings will turn orange. Click on a sortable column heading once to sort in ascending order and click on the column heading a second time to sort in descending order.

Member (	Period
Testmember	12/14/2009 - 12/2
Test Member	11/23/2009 - 11/2
Test Member	11/09/2009 - 11/

### Spell Check and Correcting Strange Characters

Many of the reports in OnCorps Reports are long narrative reports. To help ensure the professional quality of the reports you submit, we have included a spell check option for all of the fields that require extensive text entry.



😕 Spell Check - Mozilla Firefox		😻 Spell Check - Mozilla Firefox
🔝 🗋 http://mn.oncorpsreports.com/jave 🏠 🚸	• G •	😥 🗋 http://mn.oncorpsreports.com/jav 🏠 🕴 💽 🕇
Not Found in Dictionary:		
keep track of donations your program recieves, including	Ignore Once	Spell-check summary:
	Ignore All	Words: 21
A	dd to Dictionary	Documents: 1
Suggestions:		Edits: 1
receives	Change	
	Change All	
+	AutoCorrect	
Dictionary language: English (International) -		
Check grammar		
Options Undo	Done	
		OK
Done 📓 🕅 🔛	Pop-i <u>n</u> 🥹	Done 📓 🕅 🗐 Pop-i <u>n</u> 🧐

To access the spell check function, click on the button with a green check mark and ABC on it at the bottom of each text field. A Spell Check pop-up will open that will run through a spelling and grammar check for the associated text field. When the Spell Check is completed, a summary of the text field and the spell check edits will appear. To close the spell check pop-up, click the OK button.

If you see strange characters in text that you have copied and pasted from another application (usually Microsoft Word), then you will need to remove the hidden formatting that Word attaches to text before it will display correctly in a web browser. You can remove formatting by first pasting text into a simple text editor, such as Notepad in Windows, and then copying the text from the text editor to paste into OnCorps Reports. You may also need to replace punctuation marks, particularly quotes, in the web browser.

#### Footer

The footer of each page in OnCorps Reports contains links to the Program Website, Resources Page, Calendar, and Help.



## **Records, Forms, Timesheets and Reports**

Below is a list of all of the standard reports that appear under each menu section. Your program may have additional custom items that appear in these menus as well. For more details about each report, refer to the page for that report in this manual.

MANAGE RECORDS -REPORTING - FINANCIALS -TIME TRACKING -DIRECTORIES -CALENDAR HOME HELP -Home - The first page you see after you log in. Contains system generated notices of items that may require your attention. Manage Records - Create and edit records for people and places **Prospective Members** Reporting – Manage required program reports Submit Reports - Enter and edit your reports Great Stories Volunteer Mobilization **Civic Engagement Activities Direct Service Activities Capacity Building Activities Reflection Logs** View Reports - View the reports you have entered **Great Stories** Volunteer Mobilization **Civic Engagement Activities Direct Service Activities Capacity Building Activities Reflection Logs** Financials - Complete and view financial reports Submit Reports - Enter and edit financial reports In-Kind Other View Reports - View financial reports you have entered In-Kind Other Time Tracking - Enter and view your timesheets and hours **Enter Timesheets** List Timesheets Member Hours Year-To-Date Directories - Edit your contact information, look up contact information for others in your program My Profile **Program Directory** Calendar - View important events and dates for your program Help - View the Frequently Asked Questions (FAQs) page, download the tutorial and submit help requests FAQs Help Request Form

## Home

The Home page displays system generated alerts about reports and records that require your attention. State commission staff can also place messages on this page.

Clicking on the *Review* or *Update* button to the right of any notification will take you to the report or record on the site that requires attention. For most notifications, changing the item in the record or report that is generating the alert will remove the notification from the Home page. For notifications that do not require changing a record or report, clicking on the red button with an X on the right of the notification will remove it from your Home Page.

On task. On time.	ps orts™					tate & Program Year: Demo   2009-2
OME MANAGE		FINANCIALS -	TIME TRACKING -		CALENDAR	HELP -
<u>lome</u>					Page T	ools 🔹 👔 Help 🌔 Create P
Velcome Test						
					3	
est Notification of Ev	rent from your friendly State Com	mission. Staff can e	enter notices that "stick"	on the home page fo	r all system user	s in their state
-	nbers have submitted Time	sheet(s) for appro	oval:			
Member	Time sheet(s) Period			Submit date 10/02/2009	_	
Test Member	09/07/2009 - 09/13/2009	09/07/2009 - 09/13/2009				Review & Approve
Test Member	10/12/2009 - 10/18/2009			10/03/2009		Review & Approve
Test Member	11/30/2009 - 12/06/2009			09/29/2009		Review & Approve
Test Member	12/21/2009 - 12/27/2009			10/01/2009		Review & Approve
Test Member	SAMPLE PERIOD: 08/25/2000 - 09/07/2000			09/23/2009		Review & Approve
Test Member 2	09/28/2009 - 10/04/2009			08/05/2009		Review & Approve
Test Member 2	10/05/2009 - 10/11/2009			08/20/2009		Review & Approve
The following mer	nbers have late or missing t	me cards for the	following payroll p	eriods:		
Member		Payroll F	Period			
Test Member		08/31/20	09 - 09/06/2009			
Test Member 2			09 - 09/06/2009			
Test Member 2			09 - 09/13/2009			
Test Member			09 - 09/20/2009			
Test Member Test Member 2			09 - 09/27/2009			
rest member 2		0312 1120	03-03/2//2003			
The following mer	nbers have unlocked Time s	heet(s):				
Member	Time sheet(s) Period		Unlock date	Reason		
Test Member	10/05/2009 - 10/11/2009		09/04/2009	I am unlocking this t	imesheet becau	se
Test Member 2	09/07/2009 - 09/13/2009		08/06/2009	TEst Unlock of Time	sheet	

## **Manage Records**

You can create and edit records for people and places under the Manage Records menu.

Site supervisors have the following pages under the Manage Records menu.

### Prospective Members

If you have any questions about the pages found under Manage Records, please consult with your program director.

OME MANAGE	RECORDS - REPORTING -	FINANCIALS -	TIME TRACKING -	DIRECTORIES -	CALENDAR	HELP -
Prospective	e Members				Page T	ools 🕜 Help 🌔 Create P
Velcome Test						
	vent from your friendly State Com			on the home page for	r all system user:	s in their state
Member	Time sheet(s) Period	(7) 11		Submit date		
Test Member	09/07/2009 - 09/13/2009			10/02/2009		Review & Approve
Test Member	10/12/2009 - 10/18/2009	10/12/2009 - 10/18/2009				Review & Approve
Test Member	11/30/2009 - 12/06/2009	11/30/2009 - 12/06/2009				Review & Approve
Test Member	12/21/2009 - 12/27/2009	12/21/2009 - 12/27/2009				Review & Approve
Test Member	SAMPLE PERIOD: 08/25/2	SAMPLE PERIOD: 08/25/2000 - 09/07/2000				Review & Approve
Test Member 2	09/28/2009 - 10/04/2009	09/28/2009 - 10/04/2009				Review & Approve
Test Member 2	10/05/2009 - 10/11/2009	10/05/2009 - 10/11/2009				Review & Approve
The following me	nbers have late or missing t	ime cards for the	following payroll pe	eriods:		
Member		Payroll P				
Test Member			09 - 09/06/2009			
Test Member 2			09 - 09/06/2009			
Test Member 2			09 - 09/13/2009			
Test Member			09 - 09/20/2009			
Test Member Test Member 2			09 - 09/27/2009 09 - 09/27/2009			
Test Member 2		09/21/20	09-09/2/12009			
he following me	nbers have unlocked Time s	sheet(s):				
Member	Time sheet(s) Period		Unlock date	Reason		
	10/05/2009 - 10/11/2009	)	09/04/2009	I am unlocking this t	imesheet becaus	se
Test Member			TEst Unlock of Timesheet			

### **Prospective Members**

#### Manage Records > Prospective Members

Prospective members are people who have contacted you because they may be interested in enrolling in your program. State commission staff, program directors, regional coordinators, and site supervisors can all create prospective member records. To create a new prospective member record, select *Add a New Prospective Member*. Select the *Edit* button next to a prospective member to view or change that record.

Prospective Members				
Add a New Prospective Member				
Prospect Name	Phone	E-mail	Status	
Member, Prospective	123-123-1234	test@test.com	Enrolled	Edit
Member, Widget		test	Enrolled	Edit
Test Prospective Member, Staff	123-123-1234	test	Not Enrolled	Edit
Testing, Import Member	123-222-2213	letest@test	Enrolled	Edit
Testing 2, Import Member	123-222-2213	letest@test	Enrolled	Edit

The Prospective Member record is an abbreviated Member Profile record form that contains basic contact, demographic and recruitment information. At the bottom of the record is an area for comments about the prospective member. When finished, select *Save* to save the record. Click on the *Save and Print* button if you would like to create a PDF of the record in addition to saving it.

ospective Members					
First Name:	Prospective	Last Name:	Member		
Email:	test@test.com				
Address:	123 Elm Street	Address 2:			
City:	Minneapolis				
State:	Select One 👻	Zip:	55555		
Phone:	123 123 1234 Ext.	Fax:			
Cell:		Gender: <ul> <li>Male</li> <li>Female</li> </ul>			
Birth Date:	02/01/1988 Race: Native Hawaiian or Other Pacific Islander 👻				
Ethnicity:	American Indian/Alaska Native	•			
Where did you hear about your AmeriCorps position?		ewspaper/magazine 👻			
Comments	Test Test Test				
	Save and P	rint Save Cance			

## Reporting

The reporting menu is where you can submit and view your reports.

The standard reports in OnCorps Reports for site supervisors include:

Great Stories Volunteer Mobilization Civic Engagement Activities Direct Service Activities Capacity Building Activities Reflection Logs Best Practices

You may also have to complete other reports that are specific to your program.

To create and edit reports, choose the report you wish to create or modify from the Submit Reports submenu.

To view the reports you have already entered, choose the reports you wish to view from the View Reports submenu.

If you have any questions about what content should go in each report, please contact your program director.

## **Submit Reports**

### **Reporting > Submit Reports**

Depending on how your program is structured, you may be asked to submit periodic progress reports in several areas. If your program requires any or all of these reports, they will show up under Reporting > Submit Reports menu.

Under the Reporting > Submit Reports menu, you will find the following standard reports:

Individual Member Reports Great Stories Volunteer Mobilization Civic Engagement Activities Direct Service Activities Capacity Building Activities Best Practices

You may also be asked to fill out additional reports that are specific to your state and/or program.

HOME MANAGE R	ECORDS 👻	REPORTING -	FINANCIALS -	TIME TRACKING -	DIRECTORIE	S - CALENDAR	HELP ¥
lome	Submit Reports         Individual Member Reports           View Reports         Great Stories			orts	Page T	iools 🔹 ? Help 🎒 Create PE	
Welcome Test				Volunteer Mobilization			
Test Notification of Event from your friendly State Commission. Staff can		Civic Engagement Activi Direct Service Activities Capacity Building Activit	1	e for all system users in their state			
Member		Time sheet(s) Period Best Practices					
Test Member	09/07/20	09/07/2009 - 09/13/2009			10/02/2009		Review & Approve
Test Member	10/12/20	10/12/2009 - 10/18/2009			10/03/2009		Review & Approve
Test Member	11/30/20	11/30/2009 - 12/06/2009			09/29/2009		Review & Approve
Test Member	12/21/20	09 - 12/27/2009			10/01/2009		Review & Approve
Test Member	SAMPLE	PERIOD: 08/25/20	00 - 09/07/2000		09/23/2009		Review & Approve
Test Member 2	09/28/20	09 - 10/04/2009			08/05/2009		Review & Approve
Test Member 2	10/05/20	10/05/2009 - 10/11/2009			08/20/2009		Review & Approve

### **Individual Member Reports**

### Reporting > Submit Reports > Individual Member Reports

The Individual Member Reports section allows site supervisors to submit reports in their member's name so that it looks like the member entered the data in reports. The Individual Member Reports also is where site supervisors are redirected to from pages in the Time Tracking > Member Service Hours menu to approve their member's submitted time sheets. We recommend that site supervisors use the pages found under Time Tracking > Member Service Hours to manage their member's timesheets, even though it can be done from Individual Member Reports, because the pages under Time Tracking are much simpler to use.

To access each member's reports, click on the *Reports* button for that member.

Individual Member Reports							
Member Name	Site	Status	Phone	E-Mail			
TestMember	Test Service Site	Enrolled	123-123-1234	none	Reports		
Test Member 2	Test Service Site	Enrolled	123-132-1314	test	Reports		
Test Member 3	Test Service Site	Enrolled	123-123-1231	test	Reports		

After you have selected a Individual Member Reports you will see a screen with the member's name in the upper left corner, the member's service site in the upper right corner, a horizontal line, and a list of reports in gray text. To open any of the reports for the selected member, click on the report name.

Members	
Test Member (6000)	Test Service Site
Civic Engagement Activities • Great Stories • Reflection Logs • Volunteer Mobilization • Direct Service Activities • Capacity Building Activities • Hours • Time Sheets • Approve/Review Member Time Sheets •	Member Service

**Individual Member Reports: Great Stories** 

To create a new great story for a member, click on the *Add a New Great Story* button. To edit a member's existing great story, click on the *Edit* button for that story.

Members								
Test Member (6000)				Test Service Site				
Civic Engagement Activities • Great Stories • Reflection Logs • Volunteer Mobilization • Direct Service Activities • Capacity Building Activities • Member Service Hours • Time Sheets • Approve/Review Member Time Sheets •								
Great Stories								
Add a New Great Story								
Story Name	Date	Reporting Period	Promoted Story?					
Test Member Great Story	10/02/2009	Q1	Yes	Edit				

Type a name for your great story, enter a date for the story, select a reporting period, and then type your story into the provided text field. Spell check your story using the *ABC* button at the bottom of the text field. Contact your program director with any questions about what to include in this report. When finished, select *Save* to save the great story. Click on the *Save and Print* button if you would like to create a PDF of the report in addition to saving it. Your program director will be able to view the report data immediately after the report is saved.

Members		
Test Member (6000)		Test Service Site
Civic Engagement Activities • Gre Hours • Time Sheets • Approve	eat Stories • Reflection Logs • Volunteer Mobilization • D PReview Member Time Sheets •	irect Service Activities • Capacity Building Activities • Member Service
Great Stories		
	Great Story Title:	Date:
	Reporting Period: Select C	ine 👻
	Please describe your great s	tory here
	ABC	
	Save and Print Save	Cancel

Individual Member Reports: Direct Service Activities

To add a new direct service activity report for a member, click the *Add a New Direct Service Activity* button. To edit a member's existing direct service activity report, click the *Edit* button for that report.

Members								
Test Member (6000) Test Service Site								
Civic Engagement Activities • Great Stories • Reflection Logs • Volunteer Mobilization • Direct Service Activities • Capacity Building Activities • Member Service Hours • Time Sheets • Approve/Review Member Time Sheets •								
Direct Service Activities Add a New Direct Service Add	Direct Service Activities Add a New Direct Service Activity							
Activity Name	Date	Reporting Period	Duration	People Served				
network meeting	09/29/2009		One Time	12	Edit			
network meeting	09/30/2009			30	Edit			
Test Member Direct Service	10/14/2009	Q1	Bi-Weekly	7	Edit			

Enter the name of the direct service activity, the date and the reporting period for the activity, the duration of the activity (Monthly, Bi-Weekly, Weekly, One Time), the number of people served, and the description of the activity in the appropriate fields. Spell check the description of your direct service activity using the *ABC* button at the bottom of the text field. Contact your program director with any questions about what to include in this report. When finished, select *Save* to save the report. Click on the *Save and Print* button if you would like to create a PDF of the report in addition to saving it. Your program director will be able to view the report data immediately after the report is saved.

Members				
wembers				
Test Member (6000)				Test Service Site
Civic Engagement Activities • Great Stories • Reflection Logs • Hours • Time Sheets • Approve/Review Member Time Sheets •	/olunteer Mob	lization • Direct Service Activities	<ul> <li>Capacity Buildin</li> </ul>	q Activities • Member Service
Direct Service Activities				
Direct Service ActivityName:	_			
Date:		eporting Period: Select One	•	
Duration:	Select One	People Served: 0		
Please describe yo	our members o	firect service activities in the box l		
Save an		ABC Save Cancel		

### Individual Member Reports: Volunteer Mobilization

To create a new volunteer mobilization report for a member, select *Add a New Volunteer Mobilization Event*. Select the *Edit* button next to a member's volunteer mobilization report to view or change that report.

Members							
Test Member (6000) Test Service Site							
Civic Engagement Activities • Great Stories • Reflection Logs • Volunteer Mobilization • Direct Service Activities • Capacity Building Activities • Member Service Hours • Time Sheets • Approve/Review Member Time Sheets •							
Volunteer Mobilization							
Add a New Volunteer Mobilization Event							
Name	Date	Reporting Period	Duration	Num Vols	Num Hours	Num Slots	
Member Test Event	10/10/2009	Q1	One-Time	10	11	7	Edit

Enter the event name, the date of the event, the reporting period, the duration of the event, the number volunteers, the number of volunteer hours served, the number of volunteer opportunities created, and any other information required by your program. To avoid double counting volunteers and volunteer hours, make sure the volunteer data in the report has not been or will not be entered into the system by other people in your program. Contact your program director with any questions about what to include in this report. When finished, select *Save* to save the volunteer mobilization event report. Click on the *Save and Print* button if you would like to create a PDF of the report in addition to saving it. Your program director will be able to view the report data immediately after the report is saved.

### Reporting

Members			
Test Member (6000)			Test Service Site
Civic Engagement Activities • Great Stories • Reflection Logs • Volunteer Mobilizati Hours • Time Sheets • Approve/Review Member Time Sheets •	on • Direct Service Activ	ities • Capacity Building Activities •	Member Service
Volunteer Mobilization			
To avoid duplication, please make sure the vo been (or will not be) entered into the syst			
Event Name:	Date:		
Duration: Select One 👻	Impact Area of Project:	Select One	•
		Other:	
Reporting Period: Select One 👻			
Number of volunteers:			
Number of hours volunteers served:			
Number of volunteer opportunities/slots created:			
Among these voluntee Disadvantaged children and youth:			
College students enrolled in a degree-seeking program:			
Baby Boomers (individuals born between 1946 and 1964):			
Narrative			
Save and Print	ave Cancel		

Individual Member Reports: Reflection Logs

To create a new reflection log entry for a member, click the *Add a New Reflection Log Entry* button. To edit a member's existing reflection log, click the *Edit* button for that reflection log.

Members		
Test Membe	r (6000)	Test Service Site
	ment Activities • Great Stories • Reflection Logs • Volunteer Mobilization • Direct Service Activities • Capacity Building Activities • e Sheets • Approve/Review Member Time Sheets •	Member Service
Reflection A	Logs Id a New Reflection Log Entry	
Entry Date	Entry Text	
	test test test test test test test test	Edit

To fill out a reflection log, enter the date in the *Entry Date* field and your reflection in the text field provided. Spell check your reflection log using the *ABC* button at the bottom of the text field. When finished, select *Save* to save the report. Click on the *Save and Print* button if you would like to create a PDF of the report in addition to saving it. Your program director will be able to view the report data immediately after the report is saved.

Members
Test Member (6000) Test Service Site
Civic Engagement Activities • Great Stories • Reflection Logs • Volunteer Mobilization • Direct Service Activities • Capacity Building Activities • Member Service Hours • Time Sheets • Approve/Review Member Time Sheets •
Reflection Logs
Entry Date:
Please enter your reflection log here
ABS Save and Print Save Cancel

### Individual Member Reports: Civic Engagement Activities

To add a new civic engagement activity report for a member, click the *Add a New Civic Engagement Activity* button. To edit a member's existing civic engagement activity report, click the *Edit* button for that activity.

			Test Service Site				
Civic Engagement Activities • Great Stories • Reflection Logs • Volunteer Mobilization • Direct Service Activities • Capacity Building Activities • Member Service Hours • Time Sheets • Approve/Review Member Time Sheets •							
Date	Reporting Period	# of Hours					
09/15/2009	Q1	3	Edit				
	ne Sheets • Date	Date Reporting Period	Date Reporting Period # of Hours				

Enter the name of the civic engagement activity, the date the activity took place, the number of hours the activity lasted, the reporting period in which the activity took place, and a description of the civic engagement activity in the form. Spell check the description of your civic engagement activity using the *ABC* button at the bottom of the text field. Contact your program director with any questions about what to include in this report. When finished, select *Save* to save the report. Click on the *Save and Print* button if you would like to create a PDF of the report in addition to saving it. Your program director will be able to view the report data immediately after the report is saved.

Members				
Test Member (6000)				Test Service Site
<u>Civic Engagement Activities</u> • <u>Hours</u> • <u>Time Sheets</u> • <u>Appro</u>			Direct Service Activities • Capacity Bu	ilding Activities • Member Service
Civic Engagement Activit	ties			
	Name of C	ivic Engagement:		
	Date:	# of Hours: 0	Reporting Period: Select One 👻	
		Description of Civic En	gagement	
				ABC
		Save and Print Save	Cancel	

### Individual Member Reports: Capacity Building Activities

To create a new capacity building activity report for a member, click the *Add a New Capacity Building Activity* button. To edit an existing report, including checking the box that confirms the member's activities improved the capacity of your organization, click that report's *Edit* button.

Members			
Test Member (6000)			Test Service Site
Civic Engagement Activities • Great Stories • Reflection Logs Hours • Time Sheets • Approve/Review Member Time Sheets		Direct Service Activities • Capacity B	uilding Activities • Member Service
Capacity Building Activities			
Add a New Capacity Building Activity			
Title	Date	Reporting Period	
Test Member Capacity Building	09/15/2009	Q1	Edit

Fill in the title for the capacity building activity, the date of the report, the reporting period, and the description of the capacity building activity. Spell check the description of your capacity building activity using the *ABC* button at the bottom of the text field. If required, the site supervisor should check box at the bottom of the report if the activity increased the service capacity of the site. Contact your program director with any questions about what to include in this report. When finished, select *Save* to save the report. Click on the *Save and Print* button if you would like to create a PDF of the report in addition to saving it. Your program director will be able to view the report data immediately after the report is saved.

### Reporting

Members									
Test Member (6000)			Test Service Site						
Civic Engagement Activities • Great Stories • Reflection Logs • Volunteer Mobilization • Direct Service Activities • Capacity Building Activities • Member Service Hours • Time Sheets • Approve/Review Member Time Sheets •									
Capacity Building Activities									
Title (or s	short description) of capacity building project:								
	Date of this report:	Reporting Period: Select One 🔹							
	w capacity (e.g. skills, knowledge, resources, etc	<ul> <li>did your your agency acquire as a result of this a of the project on the ability of the agency to serve i</li> </ul>							
	AB N	<b>&gt;</b>							
	Please check here if this activity has helped underserved communities by offering a new (	your agency better meet the technology needs of or expanding an existing) program or service							
	Save and Print	Save Cancel							

Individual Member Reports: Member Service Hours

Clicking on the *Member Service Hours* link will open the Member Service Hours table which provides details about that Member's service hours, including their total hours and how many average hours per week they should work to complete their service.

Members																			
Test Member (	6000)																	Test Ser	vice Site
Civic Engagen Hours • Time Member Se	Sheets	Approve/Re				eer Mo	<u>biliza</u>	ation •	<u>Di</u>	rect	Service	<u>e Activ</u>	<u>vities</u> •	<u>Capa</u>	<u>city I</u>	<u>Build</u>	ing Activities •	<u>Member Se</u>	<u>rvice</u>
					Fund Rai	ising		Tr	ainii	ıg			5	Service					
Member	Status	Committed	Total	Approved			Pre		_	-	Tot	Pre				4 To	t Weeks Left	Hours Left	Avg/W

**Individual Member Reports: Time Sheets** 

Clicking on the *Timesheets* link will open tables showing all of the member's approved, submitted, and rejected timesheets. You can down load an approved member's timesheet for by clicking on the *Download Approved Timesheet* button.

Members			
Test Member (6000)			Test Service Site
	<u>Breat Stories</u> • <u>Reflection Logs</u> • ve/Review Member Time Sheets		ivities • Capacity Building Activities • Member Service
Approved Timesheets			
Period	Submitted	Timesheet Approved On	
10/19/2009 - 10/25/2009	09/01/2009 10:20 AM	09/01/2009 10:23 AM	Download Approved Timesheet
10/26/2009 - 11/01/2009	09/03/2009 10:29 AM	09/03/2009 10:34 AM	Download Approved Timesheet
11/02/2009 - 11/08/2009	09/04/2009 10:57 AM	09/04/2009 10:59 AM	Download Approved Timesheet
11/09/2009 - 11/15/2009	09/10/2009 11:56 AM	09/10/2009 12:01 PM	Download Approved Timesheet
11/23/2009 - 11/29/2009	09/22/2009 1:57 PM	09/22/2009 2:09 PM	Download Approved Timesheet
12/14/2009 - 12/20/2009	10/01/2009 11:59 AM	10/01/2009 12:06 PM	Download Approved Timesheet
		·	
Rejected Timesheets			
Period		Timesheet Rejected On	Reason
09/14/2009 - 09/20/2009		08/02/2009 4:56 PM (R)	test test

Individual Member Reports: Approve/Review Member Timesheets

You can view access all of the member's submitted and approved timesheets using the *Select a Period* drop down menu, which will also list the date the timesheet was saved, submitted, and approved. You can access submitted timesheets to review and approve or reject them.

Members	
Test Member (6000)	Test Service Site
Civic Engagement Activities • Great Stories • Reflection Logs • Volunteer Mobilization • Direct Service Activities • Capacity Building Activities • Me Hours • Time Sheets • Approve/Review Member Time Sheets •	mber Service
Approve/Review Timesheets	
SAMPLE PERIOD: 08/25/2000 - 09/07/2000 saved: 09/23/2009 submitted: 09/23/2009 Choose	
Select One	
SAMPLE PERIOD: 08/25/2000 - 09/07/2000 saved: 09/23/2009 submitted: 09/23/2009	
09/07/2009 - 09/13/2009 saved: 10/02/2009 submitted: 10/02/2009	
10/12/2009 - 10/18/2009 Saved. 10/03/2009 Submitted. 10/03/2009	
10/19/2009 - 10/25/2009 saved: 09/01/2009 submitted: 09/01/2009 approved: 09/01/2009 10/26/2009 - 11/01/2009 saved: 09/03/2009 submitted: 09/03/2009 approved: 09/03/2009	
1/02/2009 - 11/08/2009 saved: 09/04/2009 submitted: 09/04/2009 approved: 09/04/2009	
11/09/2009 - 11/15/2009 saved: 09/10/2009 submitted: 09/10/2009 approved: 09/10/2009	
11/16/2009 - 11/22/2009 saved: 09/21/2009 submitted: 09/21/2009	
11/23/2009 - 11/29/2009 saved: 09/22/2009 submitted: 09/22/2009 approved: 09/22/2009	
11/30/2009 - 12/06/2009 saved: 09/29/2009 submitted: 09/29/2009	
12/07/2009 - 12/13/2009 saved: 09/29/2009 submitted: 09/29/2009 12/14/2009 - 12/20/2009 saved: 10/01/2009 submitted: 10/01/2009 approved: 10/01/2009	
12/14/2009 - 12/27/2009 saved: 10/01/2009 submitted: 10/01/2009	

If you reject a timesheet, be sure to put the reason why the timesheet is being rejected in the space provided so the member knows what they need to change. Rejecting a timesheet will send and e-mail to the member, place a notice on their Home page, and allow the member to modify the timesheet and resubmit it for approval. Supervisors can also reject timesheets that have already been approved, just open the timesheet up, scroll to the bottom of the page and choose the reject option. For more detailed information about the timesheet process, refer to the <u>Time Tracking</u> page in this tutorial.

		Stories • Reflection Logs • Volur view Member Time Sheets •	teer Mobilization	Direct Service Act	ivities • Capacity Build	ing Activities • Memb	er Service
prove/Review	Timesheets						
elect a Period: SAMPLE PERIOD: 0	8/25/2000 - 09/0	7/2000 saved: 09/23/2009 submitte	ed: 09/23/2009	- Choose			
					-		
		You are approving tir	me entered for peri	od: 08/25/2000 - 09	0/07/2000		
		This This time sheet was s	time sheet is DUE ubmitted for appro		at 10:36 AM		
		Training			Services		
)ay	Fund raising	Pre-Service Training	Training	Education	Environment	Public Safety	Total Hours
Fri Aug 25 Desc	2	12	10	2	2	0	28
Sat Aug 26 Desc	0	0	0	0	0	0	0
Sun Aug 27 Desc	0	0	0	0	0	0	0
Mon Aug 28 Desc	0	0	0	0	0	0	0
Tue Aug 29 Desc	0	0	0	0	0	0	0
Wed Aug 30 Desc	0	0	0	0	0	0	0
Thu Aug 31 Desc	0	0	0	0	0	0	0
Fri Sep 1 Desc	0	0	0	0	0	0	0
Sat Sep 2 Desc	0	0	0	0	0	0	0
Sun Sep 3 Desc	0	0	0	0	0	0	0
Mon Sep 4 Desc	0	0	0	0	0	0	0
Tue Sep 5 Desc	0	0	0	0	0	0	0
Wed Sep 6 Desc	0	0	0	0	0	0	0
Thu Sep 7 Desc	0	0	0	0	0	0	0
Totals:	2	22			4		28
		I have reviewed and approve this tir I have reviewed and DO NOT appro (Member will be notified via. e-mail Reason for rejection:	ve this time sheet.		et)		

## **Great Stories**

### **Reporting > Submit Reports > Great Stories**

To create a new great story, click on the *Add a New Great Story* button. To edit an existing great story, click on the *Edit* button for that story. Great stories entered here will display as stories entered by a supervisor level user.

Great Stories					
Add a New Great Sto	ory				
Story Name	Date	Reporting Period	Promoted Story?		
Supervisor Great Story	09/12/2009	Q1	No	Edit	Delete
				test test test test test test test test	

Type a name for your great story, enter a date for the story, select a reporting period, and then type your story into the provided text field. Spell check your story using the *ABC* button at the bottom of the text field. Contact your program director with any questions about what to include in this report. When finished, select *Save* to save the great story. Click on the *Save and Print* button if you would like to create a PDF of the report in addition to saving it. Your program director will be able to view the report data immediately after the report is saved.

Great Stories						
	Name: Supervisor Grea	at Story	Date	e: 09/12/2009		
		Reporting Period:	Q1 .	•		
		Please describe yo	ur great story he	e		
	test test test test test test test test test	test test test test test test test test	t test test test tes t test test test te	t test test test test te t test test tes	est test test	
			•			
	Save	and Print	Save	Cancel		

## **Volunteer Mobilization**

### **Reporting > Submit Reports > Volunteer Mobilization**

To create a new volunteer mobilization report, select *Add a New Volunteer Mobilization Event*. Select the *Edit* button next to a volunteer mobilization event to view or change that report.

Volunteer Mobilization								
Add a New Volunteer	Mobilization Event							
Name	Date	Reporting Period	Duration	Num Vols	Num Hours	Num Slots		
Super Volunteer Event	10/22/2009	Q1	On-Going	12	150	5	Edit	

Enter the event name, the date of the event, the reporting period, the duration of the event, the number volunteers, the number of volunteer hours served, the number of volunteer opportunities created, and any other information required by your program. To avoid double counting volunteers and volunteer hours, make sure the volunteer data in the report has not been or will not be entered into the system by other people in your program. Contact your program director with any questions about what to include in this report. When finished, select *Save* to save the volunteer mobilization event report. Click on the *Save and Print* button if you would like to create a PDF of the report in addition to saving it. Your program director will be able to view the report data immediately after the report is saved.

Volunteer Mobilization						
	To avoid duplication, please make sure the vol been (or will not be) entered into the syste					
Event Name	e: Super Volunteer Event	Date:	10/22/2009			
Duration	n: On-Going 👻	mpact Area of Project:	Children & Youth Other:	•		
Reporting Period	d: Q1 👻		outon			
	Number of volunteers:	12				
	Number of hours volunteers served:	150				
N	Number of volunteer opportunities/slots created:	5				
	Among these volunteer	rs, how many are:				
	Disadvantaged children and youth:	1				
College	students enrolled in a degree-seeking program:	4				
Baby Boor	mers (individuals born between 1946 and 1964):	2				
	Narrative 1					
test test test test test test test test						
	Save and Print Save Cancel					

# **Civic Engagement Activities**

#### **Reporting > Submit Reports > Civic Engagement Activities**

To add a new civic engagement activity report, click the *Add a New Civic Engagement Activity* button. To edit an existing civic engagement activity report, click the *Edit* button for that activity.

Civic Engagement Activitie	s				
Add a New Civic Engagem	nent Activity				
Civic Engagement Name	Date	Reporting Period	# of Hours		
Super Civic Engagement	10/26/2009	Q1	4	Edit	Delete

Enter the name of the civic engagement activity, the date the activity took place, the number of hours the activity lasted, the reporting period in which the activity took place, and a description of the civic engagement activity in the form. Spell check the description of your civic engagement activity using the *ABC* button at the bottom of the text field. Contact your program director with any questions about what to include in this report. When finished, select *Save* to save the report. Click on the *Save and Print* button if you would like to create a PDF of the report in addition to saving it. Your program director will be able to view the report data immediately after the report is saved.

Civic Engagement Activi	ties			
	Name of Civi	c Engagement: Super Civic En	gagement	
	Date: 10/26/2009	# of Hours: 4	Reporting Period: Q1	<b>~</b>
		Description of Civic Er	gagement	
	test test test test test test te test test	st test test test test test test st test te	test test test test test test test test	est test est test
				ABC
		Save and Print Save	Cancel	

# **Direct Service Activities**

### **Reporting > Submit Reports > Direct Service Activities**

To add a new direct service activity report, click the *Add a New Direct Service Activity* button. To edit an existing direct service activity report, click the *Edit* button for that report.

Direct Service Activities					
Add a New Direct Service	Activity				
Activity Name	Date	Reporting Period	Duration	People Served	
Super Direct Service Activity	09/11/2009	Q1	Weekly	45	Edit

Enter the name of the direct service activity, the date and the reporting period for the activity, the duration of the activity (Monthly, Bi-Weekly, Weekly, One Time), the number of people served, and the description of the activity in the appropriate fields. Spell check the description of your direct service activity using the *ABC* button at the bottom of the text field. Contact your program director with any questions about what to include in this report. When finished, select *Save* to save the report. Click on the *Save and Print* button if you would like to create a PDF of the report in addition to saving it. Your program director will be able to view the report data immediately after the report is saved.

Direct Service Activities				
Name:	Super Direct Service Activity	Date: 09/11/2009	Reporting Period:	Q1 -
	Duration: Week	ly - People Serv	ed: 45	
,	aci Add specific	est test test test test test est test te	nave them. ? it agencies) within your co t test test test test test test t test tes	t
	Save and Print	ABC Save	Cancel	

### **Capacity Building Activities**

#### **Reporting > Submit Reports > Capacity Building Activities**

To create a new capacity building activity report, click the *Add a New Capacity Building Activity* button. To edit an existing report, click that report's *Edit* button.

Capacity Building Activities				
Add a New Capacity Building Activity				
Title	Туре	Date	Reporting Period	
Supervisor Capacity Building Activity		09/26/2009	Q1	Edit

Fill in the title for the capacity building activity, the date of the report, the reporting period, and the description of the capacity building activity. Spell check the description of your capacity building activity using the *ABC* button at the bottom of the text field. If required, the site supervisor should check box at the bottom of the report if the activity increased the service capacity of the site. Contact your program director with any questions about what to include in this report. When finished, select *Save* to save the report. Click on the *Save and Print* button if you would like to create a PDF of the report in addition to saving it. Your program director will be able to view the report data immediately after the report is saved.

Reporting Period: Q1 -
<li>c.) did your your agency acquire as a result of this activity? t of the project on the ability of the agency to serve individuals.</li>
t test test test test test test test te
35/
your agency better meet the technology needs of (or expanding an existing) program or service

# **Best Practices**

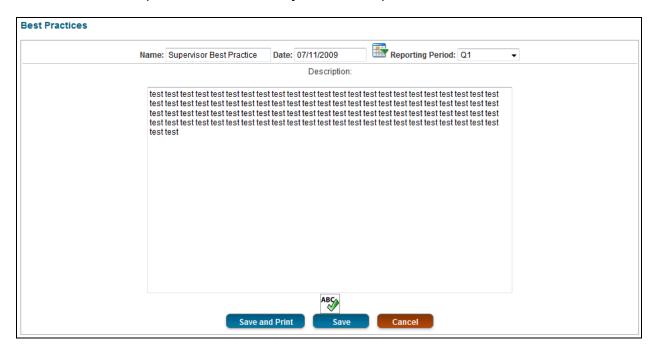
### **Reporting > Submit Reports > Best Practices**

Best Practices are a tool to share information between Program Directors, Regional Coordinators, and Site Supervisors. These are not a required report, but this may be a useful way to communicate good ideas within your program.

To create a new best practice report, click on the *Add a New Best Practice*. To edit an existing best practice report, click on the *Edit* button for that report.

Best Practices				
Add a New Best Practice				
Name	Date	Reporting Period		
Test PD Best Practice	06/30/2009	Q1	Edit	Delete
Supervisor Best Practice	07/11/2009	Q1	Edit	Delete
Super 3 Best Practice	07/11/2009	Q1	Edit	Delete

Type a name for your best practice report, enter a date for the report, select a reporting period, and then type your best practice into the provided text field. Spell check your report using the *ABC* button at the bottom of the text field. Contact your program director with any questions about what to include in this report. When finished, select *Save* to save the best practice report. Click on the *Save and Print* button if you would like to create a PDF of the report in addition to saving it. Your program director will be able to view the report data immediately after the report is saved.



### **View Reports**

#### **Reporting > View Reports**

The View Reports section lets you view all of the reports submitted by you and the members assigned to you. You cannot create, edit, or submit any reports in this section, only view data that has already been entered into the system. To add or update data, or submit reports, go to Reporting > Submit Reports.

Under the Reporting > View Reports menu, you will find the following standard reports:

Individual Member Reports Great Stories Volunteer Mobilization Civic Engagement Activities Direct Service Activities Capacity Building Activities Reflection Logs

You may also be able to view additional reports that are specific to your state and/or program under this menu.

HOME MANAGE RE	CORDS -	REPORTING -	FINANCIALS	TIME TRACKING -	DIRECTORIE	s 🗸 🛛	CALENDAR	HELP -
Home		Submit Reports	1	•			Page To	ools 🔹 🕐 Help 🍙 Create PD
tome		View Reports	շիտ	Individual Member Repo	orts	1	Page IG	
Nelcome Test				Great Stories				
Cost Matification of Fuer		friandly State Com	mission Ctoff con	Volunteer Mobilization		a for al		s in their state
Test Notification of Event from your friendly State Commission. Staff car		Civic Engagement Activ	ities	e ioi ai	r systern users	s in their state		
The following memb Member		submitted Time s leet(s) Period	sheet(s) for app					
Test Member		009 - 09/13/2009		Capacity Building Activities			_	Review & Approve
				Reflection Logs Member Status Report				Review & Approve
Test Member	10/12/20	009 - 10/18/2009	- 10/18/2009 Membe					
Test Member	11/30/20	009 - 12/06/2009			09/29/2009			Review & Approve
Test Member	12/21/20	009 - 12/27/2009			10/01/2009			Review & Approve
Test Member	SAMPLE	E PERIOD: 08/25/2	000 - 09/07/2000		09/23/2009			Review & Approve
Test Member 2	09/28/20	009 - 10/04/2009			08/05/2009			Review & Approve
Test Member 2	10/05/20	009 - 10/11/2009			08/20/2009			Review & Approve
The following memb	pers have	ate or missing ti	ime cards for th	e following payroll pe	riods:			
Member		ato or moonig a	Payroll					
Test Member			08/31/2	2009 - 09/06/2009				
Test Member 2				2009 - 09/06/2009				
Test Member 2			09/07/2	2009 - 09/13/2009				

# **Individual Member Reports**

### **Reporting > View Reports > Individual Member Reports**

Individual Member Reports allows you to view all of the reports associated with a single member in one place. To view a member's reports, click on the *Info* button.

Individual Member I	Reports				
Member Name	Site	Status	Phone	E-Mail	
Test Member	Test Service Site	Enrolled	123-123-1234	none	Info
Test Member 2	Test Service Site	Enrolled	123-132-1314	test	Info
Test Member 3	Test Service Site	Enrolled	123-123-1231	test	Info

After you have selected a Individual Member Reports you will see a screen with the member's name in the upper left corner, the member's service site in the upper right corner, a horizontal line, and a list of reports in gray text. Below the report links will be all of the member's reports. To go directly to any of the reports for the selected member, click on the report name.

#### Reporting

#### Member Info

Test Member (6000)	Test Service Site
Civic Engagement Activities • Great Stories • Reflection Logs • Volunteer Mobilization • Direct Service Activities • Capacity Building Activities • Hours • Time Sheets •	Member Service

#### **Great Stories**

Story Name	Date	Promoted Story?
Test Member Great Story	10/02/2009	Yes
test test test test test test test test	test test test test test test test test	test test test test test test test test

#### **Direct Service Activities**

Activity Name	Date	Duration	People Served					
network meeting	09/29/2009	One Time	12					
network meeting, project timeline								
network meeting	09/30/2009		30					
project update								
Test Member Direct Service	10/14/2009	Bi-Weekly	7					
test test test test test test test test								

#### Volunteer Mobilization

Name	Date	Duration	Impact Area	Num Vols	Num Hours	Num Slots	Dis- advantaged	College	Boomer
Member Test Event	10/10/2009	One-Time	Adult Education & Literacy	10	11	7	2	2	1
			est test test test test test test est test t						

#### **Reflection Logs**

#### Entry Date Entry Text

#### **Civic Engagement Activities**

Civic Engagement Name	Date	# of Hours
Member Test Civic Engagement	09/15/2009	3
test test test test test test test test		

#### **Capacity Building Activities**

Title	Date
Test Member Capacity Building	09/15/2009
test test test test test test test test	

#### **Total Timesheet Hours**

						Fui Rais			т	raini	ing				Service	e					
Member	Status	Committed	Total	Approved	Pending	Pre	Tot	Pre	1	2	3 4	Tot	Pre	1	2	3	4	Tot	Weeks Left	Hours Left	Avg/Wk
Test Member	Enrolled	1700	533.5	159.25	374.25	0	3	0	19.25	19	0 0	38.25	40	33.75	34.25	10	0	118	47	1166.5	24.82

#### **Approved Timesheets**

Period	Submitted	Timesheet Approved On	
10/19/2009 - 10/25/2009	09/01/2009 10:20 AM	09/01/2009 10:23 AM	Download
10/26/2009 - 11/01/2009	09/03/2009 10:29 AM	09/03/2009 10:34 AM	Download
11/02/2009 - 11/08/2009	09/04/2009 10:57 AM	09/04/2009 10:59 AM	Download
11/09/2009 - 11/15/2009	09/10/2009 11:56 AM	09/10/2009 12:01 PM	Download
11/23/2009 - 11/29/2009	09/22/2009 1:57 PM	09/22/2009 2:09 PM	Download
12/14/2009 - 12/20/2009	10/01/2009 11:59 AM	10/01/2009 12:06 PM	Download

#### **Rejected Timesheets**

Period	Timesheet Rejected On	Reason
09/14/2009 - 09/20/2009	08/02/2009 4:56 PM (R)	test test

#### Submitted (to be approved) Timesheets

Period	Submitted	Super #1	Approved?	Super #2	Approved?	Super #3	Approved?	Super #4	Approved?
SAMPLE PERIOD: 08/25/2000 - 09/07/2000	09/23/2009 10:36 AM	Test Supervisor	No						
09/07/2009 - 09/13/2009	10/02/2009 1:59 PM	Test Supervisor	No	PD as a Supervisor	No				
10/12/2009 - 10/18/2009	10/03/2009 4:13 PM	Test Supervisor	No						
11/16/2009 - 11/22/2009	09/21/2009 2:30 PM	Test Supervisor	Yes	PD as a Supervisor	No				
11/30/2009 - 12/06/2009	09/29/2009 7:23 PM	PD as a Supervisor	No	Test Supervisor	No				
12/07/2009 - 12/13/2009	09/29/2009 7:54 PM	PD as a Supervisor	No	Test Supervisor	Yes				
12/21/2009 - 12/27/2009	10/01/2009 12:33 PM	Test Supervisor	No						

#### Late Timesheets

Period
08/31/2009 - 09/06/2009
09/21/2009 - 09/27/2009
09/28/2009 - 10/04/2009
10/05/2009 - 10/11/2009

# **Great Stories**

### **Reporting > View Reports > Great Stories**

You can view all of the great stories you and the members assigned to you have entered into the system on this page. You cannot edit your great stories here; that can be done under <u>Reporting > Submit Reports > Great Stories</u>.

Great Stories								
Member Great Stori	es							
Member Name	Story Title	Reporting Period	Promoted Story?					
Test Member	Test Member Great Story	Q1	Yes					
test test test test test test test test								
Member Name	Story Title	Reporting Period	Promoted Story?					
Test Member 2	Member Test 2	Q1	No					
test test test test Member Name	test test test test test test test	Reporting Period	Promoted Story?					
	*							
Test Member 3       Test Member 3 Story Entered by Super 2       Q1       No         test test test test test test test test								
Supervisor Great St		Descedies Desired						
Supervisor Name	Story Title	Reporting Period	Promoted Story?					
Test Supervisor	Supervisor Great Story	Q1	No					
	test test test test test test test test							

### **Volunteer Mobilization**

#### **Reporting > View Reports > Volunteer Mobilization**

You can view all of the volunteer mobilization reports you and the members assigned to you have entered into the system on this page. You cannot edit your volunteer mobilization reports here; that can be done under <u>Reporting > Submit Reports ></u> <u>Volunteer Mobilization</u>.

Volunteer Mobi	lization									
Member Volunt	eer Mobilization									
Member Name	Name	Date	Reporting Period	Duration	Vols	Hours	Slots	Disadvantaged	College	Boomers
Test Member	Member Test Event	10/10/2009	Q1	One-Time	10	11	7	2	2	1
	test test test test test test test test									
Member Name	Name	Date	Reporting Period	Duration	Vols	Hours	Slots	Disadvantaged	College	Boomers
Test Member 2	Member Test 2 Volunteer Event	09/27/2009	Q1	On-Going	26	300	15	2	8	2
	st test test test test test tes st test te								test test tes	st test test test
Member Name	Name	Date	Reporting Period	Duration	Vols	B Hours	Slots	Disadvantaged	College	Boomers
Test Member 3	Test Member 3 Event Entered by Super 2	09/28/2009	Q1	On-Going	16	51	15	3	5	4
	st test test test test test tes st test te									
Supervisor Volu	unteer Mobilization									
Supervisor Name	Name	Date I	Reporting Period	Duration	Vols	Hours	Slots	Disadvantaged	College	Boomers
Test Supervisor	Super Volunteer Event	10/22/2009	21	On-Going	12	150	5	1	4	2
test test test test test	st test test test test test tes st test te	t test test test test	test test test test	test test test tes	st test te	st test tes	t test test	test test test test		

# **Civic Engagement Activities**

### **Reporting > View Reports > Civic Engagement Activities**

You can view all of the civic engagement activity reports you and the members assigned to you have entered into the system on this page. You cannot edit your civic engagement activity reports here; that can be done under <u>Reporting > Submit Reports > Civic Engagement Activities</u>.

Civic Engagement Activities									
Member Civic Enga	gement Activities								
Member Name	Civic Engagement Name		Date	Reporting Period	Hours				
Test Member	Member Test Civic Engagement		Sep 15, 2009	Q1	3				
test test test test test test test test									
Member Name	Civic Engagement Name		Date	Reporting Period	Hours				
Test Member 2	Member Test 2 Civic Engagement		Sep 22, 2009	Q1	4				
test test test test test test	t test test test test test test test te	test test test test test test test test	st test test test Date	st test test test test test test test	test test test test				
Test Member 3		ntered by Super 2	Sep 30, 2009		5.25				
	test test test test test test test test								
Supervisor Name	Civic Engagement Nam	e Date		Reporting Period	Hours				
test test test test test test test test	Test Supervisor       Super Civic Engagement       Oct 26,2009       Q1       4         test test test test test test test test								

### **Direct Service Activities**

### **Reporting > View Reports > Direct Service Activities**

You can view all of the direct service activity reports you and the members assigned to you have entered into the system on this page. You cannot edit your direct service activity reports here; that can be done under <u>Reporting > Submit Reports > Direct</u> <u>Service Activities</u>.

Member Name	A stivity Name	Date	Departing Deviad	Duration	Deeple Conved
Test Member 3	Activity Name Test Member 3 Direct Service Entered by Super 2	09/03/2009	Reporting Period	One Time	23 People Served
test test test test	test test test test test test test test	est test test test test est test test te	test test test test test test test te	st test test test test st test test test	t test test test test test t t test test
Member Name	Activity Name	Date	Reporting Period	Duration	People Served
Test Member	network meeting	09/29/2009		One Time	12
network meeting, pro	ect timeline			I	
Member Name	Activity Name	Date	Reporting Period	Duration	People Served
Test Member	network meeting	09/30/2009			30
project update					
Member Name	Activity Name	Date	Reporting Period	Duration	People Served
Test Member 2	Member Test 2 Direct Service	10/05/2009	Q1	Bi-Weekly	15
test test test test	test test test test test test test test	est test test test t	test test test test test test te	st test test test	
Mombor Namo		10/14/2009	Q1	Bi-Weekly	7
	Test Member Direct Service		54 F	D. HOONIN	
	Test Member Direct Service test test test test test test test tes	est test test test t			
Test Member lest test test test lest test test test lest test test test test test test test	test test test test test test test test	est test test test t			
Fest Member lest test test test lest test test test lest test test test lest test test test	test test test test test test test test	est test test test test test test test			

# **Capacity Building Activities**

### **Reporting > View Reports > Capacity Building Activities**

You can view all of the capacity building activity reports you and the members assigned to you have entered into the system on this page. You cannot edit your capacity building activity reports here; that can be done under <u>Reporting > Submit Reports > Capacity</u> <u>Building Activities</u>.

Capacity Building A	ctivities								
Member Capacity B	Building	Activities							
Member Name	Name		Туре	Date	Reporting Period	Meet Needs?			
Test Member	Test Mer	nber Capacity Building		09/15/2009	Q1	Yes			
	test test test test test test test test								
Member Name	Name		Туре	Date	Reporting Period	Meet Needs?			
Test Member 3	Test Mer	nber 3 Capacity Enteredy by Super 2		10/14/2009	Q1	Yes			
		test test test test test test test test							
Member Name	Name		Туре	Date	Reporting Period	Meet Needs?			
Test Member 2	Member	Test 2 Capacity Building		10/19/2009	Q1	Yes			
test test test test test test	st test test	test test test test test test test test	t test test t	est test test test test	t test test test test test test te				
Supervisor Capacit	Supervisor Capacity Building Activities								
Supervisor Name		Name	Туре	Date	Reporting Period	Meet Needs?			
Test Supervisor	:	Supervisor Capacity Building Activity		09/26/2009	Q1	Yes			
test test test test test test	st test test	test test test test test test test test	t test test t	est test test test test					

# **Reflection Logs**

### **Reporting > View Reports > Reflection Logs**

You can view all of the reflection log reports the members assigned to you have entered into the system on this page. You cannot edit your reflection log reports here; that can be done under Reporting > Submit Reports > Reflection Logs.

Reflection Logs	
Name	Date
Test Member	09/02/2009
test test test test test test test test	t test test test test test test test te
Name	Date
Test Member 3	09/12/2009
test test test test test test test test	
Name	Date
Test Member 2	10/18/2009
test test test test test test test test	I test test test test test test test tes

# Member Status Report

### **Reporting > View Reports > Member Status Report**

The member status report shows basic member information, including: name, slot type, status, phone, e-mail, service start data, service mi-year date, and service end date.

Member Status Report								
Member Name	Slot Type	Status	Phone	E-Mail	Service Start	Service Mid	Service End	
Test Member	Full-Time	Enrolled	123-123-1234	none	06/01/2009	02/15/2010	08/31/2010	
Test Member 2	Full-Time	Enrolled	123-132-1314	test	06/01/2009	02/15/2010	08/31/2010	
Test Member 3	Half-Time	Enrolled	123-123-1231	test	09/01/2009	02/15/2010	08/31/2010	

# **Financials**

The Financials menu is where you can submit and view financial reports.

The standard financial reports in OnCorps Reports for site supervisors include:

In-Kind Other

You may also have to complete other reports that are specific to your program.

To create and edit financial reports, choose the report you wish to create or modify from the Submit Reports submenu.

To view the financial reports you have already entered, choose the reports you wish to view from the View Reports submenu.

If you have any questions about what content should go in each report, please contact your program director.

# **Submit Reports**

### Financials > Submit Reports

Some programs or state may require site supervisors to fill out financial reports in addition to any progress reports that may be required, which can be found under the Reporting menu. If your program requires you to fill out financial reports, they will appear in the Financials > Submit Reports menu.

Under the Financials > Submit Reports menu, you will find the following standard report:

#### In-Kind Other

You may also be asked to fill out additional reports that are specific to your state and/or program.

	OnCorp Report	S S <sup>TM</sup>				Logged in as: Serv	st Supervisor <u>view/edit profile   logout</u> vice Site Supervisor   Test Program te & Program Year: Demo   2009-2010
н	OME MANAGE REC	ORDS - REPORTING -	FINANCIALS -	TIME TRACKING -		CALENDAR	HELP -
			Submit Reports	رائی In-K	nd Other		
	ome		View Reports			То	ools 🕜 Help 🕒 Create PDF
<b>.</b> ,	/elcome Test						
ľ	vercome rest						
Т	est Notification of Event f	from your friendly State Com	mission. Staff can e	nter notices that "stick	on the home page fo	r all system users	in their state
١.	ka fallaudaa mamba	have exhauitted Time					
LE	ne lonowing membe Member	rs have submitted Time Time sheet(s) Period	sneeds) for appro	ovai:	Submit date		
	Test Member	09/07/2009 - 09/13/2009			10/02/2009		Review & Approve
	restmentber	09/07/2009 - 09/13/2009			10/02/2009		
	Test Member	10/12/2009 - 10/18/2009			10/03/2009		Review & Approve
1	Test Member	11/30/2009 - 12/06/2009			09/29/2009		Review & Approve
1	Test Member	12/21/2009 - 12/27/2009			10/01/2009		Review & Approve
	Test Member	SAMPLE PERIOD: 08/25/2	000 - 09/07/2000		09/23/2009		Review & Approve
	Test Member 2	09/28/2009 - 10/04/2009			08/05/2009		Review & Approve
	Test Member 2	10/05/2009 - 10/11/2009			08/20/2009		Review & Approve
т	he following membe	rs have late or missing t	ime cards for the	following payroll p	eriods:		
N	Aember 0		Payroll P	eriod			
I	Fest Member		08/31/20	09 - 09/06/2009			
ĿР	Fest Member 2		08/31/20	09 - 09/06/2009			
T	Fest Member 2		09/07/20	09 - 09/13/2009			

# **In-Kind Other**

### Financials > Submit Reports > In-Kind Other

In-Kind Other refers to goods and services other than site supervisor time that have been donated to the program. Contact your program director for guidance on what qualifies as In-Kind Other. Always be sure to keep paper receipts for all donated goods and services in your records. This form is only intended to be a way to easily collect In-Kind Other information for use in other financial reports.

To create a new in-kind other report, select *Add a New In-Kind Other*. Select the *Edit* button next to an in-kind other report to view or change that report.

In-Kind Other				
Add a New Other In-Kind Item				
Name	Date	Estimated Value		
Test Super In-Kind	09/23/2009	\$235	Edit	Delete
Supervisors must keep receipts in t throw away paperwork for the Other		ay for financial staff in the program o	ffice to track site based in-kind other	donations more easily. Do not

Enter the name of the in-kind donor, the date of the donation, the estimated value of the donation, and a description of the in-kind other donation. Spell check the description of your in-kind other donation using the *ABC* button at the bottom of the text field. Contact your program director with any questions about what to include in this report. When finished, select *Save* to save the report. Click on the *Save and Print* button if you would like to create a PDF of the report in addition to saving it. Your program director will be able to view the report data immediately after the report is saved.

In-Kind Other				
		Other In-Kind	_	
In-Kind Donor:	Test Super In-Kind	Date: 09/23/2009	Estimated Value:	235
		Description:		
	in the program office to t	receipts in their files. This is only rack site based in-kind other dor rk for the Other In-Kind donation.	nations more easily. Do	
	Save and	d Print Save	Cancel	

### **View Reports**

#### **Financials > View Reports**

The View Reports section lets you view all of the financial reports you have submitted. You cannot create, edit, or submit any reports in this section, only view data that has already been entered into the system. To add or update data, or submit financial reports, go to Financials > Submit Reports.

Under the Financials > View Reports menu, you will find the following standard report:

#### In-Kind Other

You may also be able to view additional reports that are specific to your state and/or program under this menu.

OME MANAGE	RECORDS - REPORTING -	FINANCIALS -	TIME TRACKING -		CALENDAR	HELP -
lome		Submit Reports	•		Page T	ools 🔹 🕐 Help 🌔 Create PDF
lonic		View Reports	la In-Kin	d Other	rayer	
Velcome Test						
est Notification of E	vent from your friendly State Com	mission. Staff can e	nter notices that "stick"	on the home page fo	r all system user	s in their state
		1 411				
he following mei Member	nbers have submitted Time Time sheet(s) Period	sheet(s) for appro	oval:	Submit date		
						Deview 0 Annex
Test Member	09/07/2009 - 09/13/2009			10/02/2009	_	Review & Approve
Test Member	10/12/2009 - 10/18/2009			10/03/2009		Review & Approve
Test Member	11/30/2009 - 12/06/2009			09/29/2009		Review & Approve
Test Member	12/21/2009 - 12/27/2009			10/01/2009		Review & Approve
Test Member	SAMPLE PERIOD: 08/25/2	000 - 09/07/2000		09/23/2009		Review & Approve
Test Member 2	09/28/2009 - 10/04/2009			08/05/2009		Review & Approve
Test Member 2	10/05/2009 - 10/11/2009			08/20/2009		Review & Approve
		ima aarda far tha	following navroll no	riods:		
The following me Member	mbers have late or missing t	Pavroll P	0171			

### **In-Kind Other**

#### Financials > View Reports > In-Kind Other

You can view all of the in-kind other reports you have entered into the system on this page. You cannot edit your in-kind other reports here; that can be done under <u>Financials > Submit Reports > In-Kind Other</u>.

In-Kind Other							
Name	Date	Estimated Value	Status				
Test Super In-Kind	09/23/2009	\$235.00	Not Submitted				
Supervisors must keep receipts in their files. This is only a way for financial staff in the program office to track site based in-kind other donations more easily. Do not throw away paperwork for the Other In-Kind donation.							

# **Time Tracking**

The Time Tracking menu is where you can approve and manage member timesheets and enter your in-kind hours.

Member hours can be managed using the pages under the <u>Member Service Hours</u> submenu.

You can enter and view your in-kind hours using the pages under the <u>Supervisor In-Kind Hours</u> submenu.

The timesheet system in OnCorps reports is in full compliance with CNCS requirements for online timesheets. The timesheet process is outlined below.

1) Members, who are the only ones allowed to enter hours in OnCorps, log in, fill out a timesheet and submit it to the supervisor(s) who supervised them during the timesheet period. The timesheet is now locked and members can no longer revise it.

2) An e-mail is sent to all of the supervisors selected by the member that they have a timesheet ready for approval. A notice also appears on the supervisor's Home page.

3) The supervisor logs in to OnCorp Reports and reviews the member's timesheet. The supervisor can either:

a) Approve the timesheet. (All supervisors that received the timesheet must approve it independently before the hours are officially approved)

i) Once a timesheet has been approved by all of the supervisors it was sent to, it is available for viewing by program directors. Program directors viewing approved timesheets can either

(1) Do nothing, in which case the timesheet is considered correct and no further action is needed

(2) Unlock the timesheet and enter in the reason why it is being sent back to the member for revisions.

(i) An e-mail will be sent to the member and supervisor and a notice will appear on their Home pages when a timesheet is unlocked. The unlocked timesheet is now open for revisions by the member.

(ii) The member logs in, goes to the timesheet, corrects the timesheet, and resubmits the timesheet to their supervisors, who must then review and either approve or reject it.

b) Reject the timesheet and enters in the reason why it was rejected. (Only one supervisor needs to reject a timesheet to reject it for all supervisors it was sent to)

i) An e-mail will be sent to the member and a notice will appear on their Home page upon timesheet rejection. The rejected timesheet is now open for revisions by the member.

ii) The member logs in, goes to the timesheet, corrects the timesheet, and resubmits the timesheet to their supervisors, who must then review and either approve or reject it.

Timesheets can also be rejected after then have been approved by a supervisor if needed. This will start the approval process over again.

If you have questions about how to classify your hours, please consult with your program directors and supervisors.

### **Member Service Hours**

### Time Tracking > Member Service Hours

You can manage member timesheets, including approving and rejecting timesheets, using the pages under the Member Service Hours submenu.

The pages included under Member Service Hours include the following:

Approve Member Timesheets Filter Member Timesheets Member Total Hours Graph Member Total Hours Year-To-Date Print Member Timesheets Reject Approved Member Timesheets

If you have questions about when a timesheet should be rejected and other timesheet policies for your program, please consult with your program director.

IOME MANAGE R	ECORDS 👻	REPORTING -	FINANCIALS -	TIME TRACKING -	DIRECTO	RIES 🔻	CALENDAR	HELP 🔻	
lome				Member Service Hour		Approv	e Member Times	heets	🕒 Create PD
				Supervisor In Kind Ho	urs	Filter M	lember Timeshe	ets	
Velcome Test						Total M	lember Hours Gr	aph	
							er Total Hours Ye	ar-To-Date	
Fest Notification of Eve	ent from your f	friendly State Comr	nission. Staff can e	enter notices that "stick" (	on the home	Print M	ember Timeshee	ets	
The following mem	bers have s	submitted Time s	sheet(s) for appro	oval:		Reject	Approved Memb	er Timesheets	
Member	Time sh	eet(s) Period			Submit da	te			
Test Member	09/07/20	009 - 09/13/2009			10/02/2009	9		Review & Appr	ove
Test Member	10/12/20	009 - 10/18/2009			10/03/200	9		Review & Appr	ove
Test Member	11/30/20	009 - 12/06/2009			09/29/200	9		Review & Appr	ove
Test Member	12/21/20	009 - 12/27/2009			10/01/200	9		Review & Appr	ove
Test Member	SAMPLE	PERIOD: 08/25/20	000 - 09/07/2000		09/23/200	9		Review & Appr	ove
Test Member 2	09/28/20	009 - 10/04/2009			08/05/2009	9		Review & Appr	ove
Test Member 2	10/05/20	009 - 10/11/2009			08/20/200	9		Review & Appr	ove
The following mer	bore bavo l	ato or missing ti	mo carde for the	following payroll pe	riode				
Member	ibera nave i	ate of missing ti	Payroll P	0171	nous.				
Test Member			-	09 - 09/06/2009					
Test Member 2			08/31/20	09 - 09/06/2009					
Test Member 2			00/07/20	09 - 09/13/2009					

## **Approve Member Timesheets**

### Time Tracking > Member Service Hours > Approve Member Timesheets

The Approve Member Timesheets report is designed to give supervisors an easy way to access all of their member's timesheets that have been submitted and need to be approved. All of your member's timesheets that have been submitted but not yet approved will display in the Submitted (to be approved) Timesheets table at the bottom of the page. Submitted timesheets can be filtered by either timesheet period using the Select a Period drop down menu or they can be filtered by member using the Select a *Member* drop down menu. To approve a timesheet, click on the *Approve* button for that timesheet and you will be taken directly to the timesheet for review and approval or rejection. If a timesheet had been sent to multiple supervisors, you will see each supervisor and whether they have approved the timesheet in the table. In order for a timesheet sent to multiple supervisors to be approved, all of the supervisors must approve it. A timesheet may still appear in the Submitted (to be approved) Timesheets table after you have approved it because the other supervisors the timesheet was sent to still need to approve it. If any of the supervisors rejects a timesheet, then it gets sent back to the member for revisions and will have to be approved again by all the supervisors it is sent to.

Approve	Member Timeshe	eets								
Select a	Period:									
Use this to	view submitted meml	ber timesheets i	within a specifi	c payroll periodall	l submitted merr	nber timesheets wi	ill be disp	lay for the selec	ted payrol	period.
	PERIOD: 08/25/2000 -		Choose							
				-						
OR Selec	ct a Member:									
Use this to	view all of an individu	al members' SU	BMITTED time	sheets.						
Select One	e 👻 Choose									
<b>0 1</b>										
submitte	d (to be approve	a) limesnee	(5							
Member	Period	Submitted	Super #1	Super #1 Approved?	Super #2	Super #2 Approved?	Super #3	Super #1 Approved?	Super #4	Super #4 Approved?
Test Member	SAMPLE PERIOD: 08/25/2000 - 09/07/2000	09/23/2009 10:36 AM	Test Supervisor	Approve		Approved.		Approved.		Approved
Test Member	09/07/2009 - 09/13/2009	10/02/2009 1:59 PM	Test Supervisor	Approve	PD as a Supervisor					
Test Member	10/12/2009 - 10/18/2009	10/03/2009 4:13 PM	Test Supervisor	Approve						
Test Member	11/16/2009 - 11/22/2009	09/21/2009 2:30 PM	Test Supervisor	Yes 09/21/2009	PD as a Supervisor					
Test Member	11/30/2009 - 12/06/2009	09/29/2009 7:23 PM	PD as a Supervisor		Test Supervisor	Approve				
Test Member	12/07/2009 - 12/13/2009	09/29/2009 7:54 PM	PD as a Supervisor		Test Supervisor	Yes 09/29/2009				
Test Member	12/21/2009 - 12/27/2009	10/01/2009 12:33 PM	Test Supervisor	Approve						
Test Member 2	09/14/2009 - 09/20/2009	07/11/2009 9:32 PM	Test Supervisor	Yes 08/26/2009	Test Super 2					
Test Member 2	09/28/2009 - 10/04/2009	08/05/2009 11:07 AM	Test Supervisor	Approve						
Test Member 2	10/05/2009 - 10/11/2009	08/20/2009 12:00 PM	Test Supervisor	Approve						

### **Filter Member Timesheets**

#### Time Tracking > Member Service Hours > Filter Member Timesheets

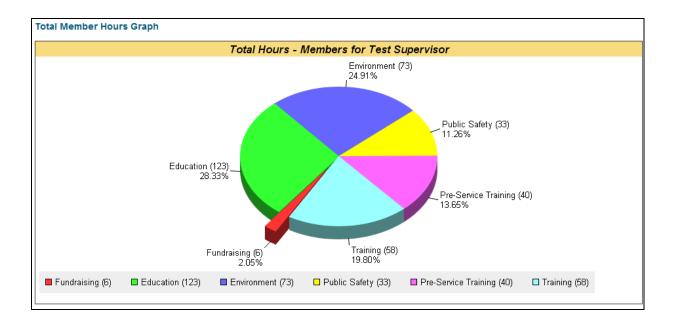
You can view your member's timesheets by period, member or timesheet status using the drop down menus on the Filter Member Timesheets page. Filtering by timesheet period using the *Select a Period* drop down menu will show all of the submitted, approved, and rejected timesheets for your members during that period. If you filter by member using the *Select a Member* drop down menu, you will be taken to a new page that lists all of that member's timesheets. You can also sort for all of the timesheets that have a certain status, such as approved, submitted, rejected, late and not started by using the *Select a Timesheet Status* drop down menu. Click on the *Download* button next to approved timesheets to download a PDF of that timesheet for your records. Click on the *View* button next to a timesheet to view the timesheet in a pop-up window.

Filter Member Timesheet	S			
Select a Period:				
Use this to view and unlock mer 09/14/2009 - 09/20/2009	mber timesheets within a specific Choose	c payroll periodall men	nber timesheets will be display	for the selected payroll period.
OR Select a Member:				
Use this to view and download a	all of an individual members' APF	ROVED or REJECTED	timesheets, and will also show	YTD hours for the selected member.
Select One - Choose	e		2	
OR Select a Timesheet St	tatus:			
This allows you to see ALL men Select a Timesheet Status	nber timesheets, filtered by appro	oved, submitted, rejecte	d, late or not started.	
Submitted Time Sheet(s) for pe	riod: 09/14/2009 - 09/20/2009			
Member	Supervisor		Submitted	
Test Member 2	Test Supervisor		07/11/2009 9:32 PM	View
Approved Time Sheet(s) for per There are no approved Time She Rejected Time Sheet(s) for peri	eet(s) for this period			
Member	Supervisor	Rejected On	Reason	
Test Member	Test Supervisor	08/02/2009 4:56 PM (R)	test test	View

### **Member Total Hours Graph**

### Time Tracking > Member Service Hours > Member Total Hours Graph

The Member Total Hours Graph report shows a pie chart graph representing all of the approved hours served by your members, partitioned into the types of hours they can serve. The number in parenthesis next to each hours type represents the total number of approved hours served in that category.



### Member Total Hours Year-To-Date

### Time Tracking > Member Total Hours Year-To-Date

The Member Hours Year-To-Date table shows the status of all hours that have been entered into your member's timesheets. Each column of the table is defined below.

							ınd ising		т	rain	ing					Servi	се					
Member	Status	Committed	Total	Approved	Pending	Pre	Tot	Pre	1	2	3	4	Tot	Pre	1	2	3	4	Tot	Weeks Left	Hours Left	Avg/Wk
Test Member	Enrolled	1700	533.5	159.25	374.25	0	3	0	19.25	19	0	0	38.25	40	33.75	34.25	10	0	118	47	1166.5	24.82
Test Member 2	Enrolled	1700	193.5	30	163.5	0	1	0	7.25	8	0	0	15.25	0	8	5.75	0	0	13.75	47	1506.5	32.05
Test Member 3	Enrolled	900	167	146	21	0	2	0	14	31	2	0	47	0	41	33	23	0	97	47	733	15.6
TOTALS		4300	894	335.25	558.75	0	6	0	40.5	58	2	0	0	40	82.75	73	33	0	228.75	141	3406	72.47

#### Member Total Hours Year-To-Date

	Training								
1	Pre-Service Training								
2	Training								
3									
4									
Service									
1	Education								
2	Environment								
3	Public Safety								
4									

**Committed:** The number of hours a member committed to serve **Total:** The total hours entered into a timesheet by a member (includes **Approved** and **Pending** hours)

**Approved:** The total hours that have been approved by all supervisors **Pending:** The total hours entered into timesheets that have not been approved by supervisors (includes hours in timesheets that have been submitted for approval but have not been approved yet and hours saved in timesheets that have not been submitted to supervisors yet)

**Pre:** Pre OnCorps Hours (hours that were approved using a different timekeeping system before members began using OnCorps timesheet system) for Fundraising, Training, and Service

**1**, **2**, **3**, **4**: Number of hours in each of the four possible subcategories of Training and Service hours that have been entered into OnCorps using the OnCorps timesheet system..

**Tot:** (**Pre + 1, 2, 3, 4**) for each type of hours (Fundraising, Training, and Service) **Weeks Left:** The result of ((Expected Service End Date - Current Date) / 7) rounded up to the nearest integer

Hours Left: (Committed - (Pending + Approved + (sum of all Pre hours))) Avg/Wk: (Hours Left / Weeks Left) Because of how Weeks Left is calculated, this value may have a margin of error of up to six days.

### **Print Member Timesheets**

#### Time Tracking > Member Service Hours > Print Member Timesheets

The Print Member Timesheets page creates a single PDF with all of the selected approved member timesheets for one or many timesheet periods. Select the timesheet periods from the Select a Period list box. You can select multiple timesheet periods by holding down the Ctrl key on your keyboard as you click on multiple timesheet periods. You also have the option of having only a single member's timesheets display for the periods you have selected by entering a member's last name in the Member Last Name text box. Click the Submit button to see all of the approved timesheets for the periods you have selected. In the table that appears, all of the approved timesheets for the timesheet periods you selected (optionally filtered by a member's last name) will be listed with the member's name, timesheet period, submittal date, approval date and a print check box. Only timesheets that have their print check box selected will be included in the PDF. Use the Check All button to check all of the print check boxes and the Uncheck All button to uncheck all of the print check boxes. If you want to include the hours descriptions in the PDF, set the Include Descriptions? radio buttons to "Yes." Click the Print Selected Timesheets button to create a single PDF of all of the selected timesheets that can be printed and saved to your computer.

Print Member Tim	esheets			
	SAMPLE PERIOD: 08/25/200 elect a Period: 08/31/2009 - 09/06/2009 l-key to select 09/07/2009 - 09/13/2009 multiple) 09/14/2009 - 09/20/2009 09/21/2009 - 09/27/2009	00 - 09/07/2000		
Membe	(optional)			
			CI	heck All Uncheck All
Member	Period	Submitted	Approved	Print
Test Member	10/19/2009 -10/25/2009	09/01/2009 10:20 AM	09/01/2009 10:23 AM	
Test Member 2	10/12/2009 -10/18/2009	08/28/2009 1:41 PM	08/28/2009 1:43 PM	
		Include Descriptions? © Yes <ul> <li>No</li> </ul> Print Selected Timesheets		

### **Reject Approved Member Timesheets**

#### Time Tracking > Member Service Hours > Reject Approved Member Timesheets

The Reject Approved Member Timesheets report is designed to give supervisors an easy way to reject an already approved timesheet that may have been approved with an error in the member's hours. Rejecting an approved timesheet will notify the member that the timesheet was rejected and allow them to revise the timesheet before they resubmit it to their supervisor(s) for approval. Approved timesheets can be filtered by either timesheet period using the *Select a Period* drop down menu or they can be filtered by member using the *Select a Member* drop down menu. Any approved timesheets that match your filter criteria will appear in the *Approved Timesheets* table at the bottom of the page. To reject an approved timesheet, click on the *Reject* button for that timesheet and you will be taken directly to the timesheet where you can select the reject option and enter the reason for the rejection at the bottom of the timesheet. Click on the *Download* button next to approved timesheets to download a PDF of that timesheet for your records.

Reject Approved Member Timesheets										
Select a Period:										
Use this to view approved member timesheets within a specific payroll periodall approved member timesheets will be display for the selected payroll period. SAMPLE PERIOD: 08/25/2000 - 09/07/2000 - Choose										
OR Select a Member:										
Use this to view all of an individual members' APPROVED timesheets.           Test Member         Choose										
Approved Timesheets										
Member	Period	Submitted	Approved							
Test Member	10/19/2009 - 10/25/2009	09/01/2009 10:20 AM	09/01/2009 10:23 AM	Download	Reject					
Test Member	10/26/2009 - 11/01/2009	09/03/2009 10:29 AM	09/03/2009 10:34 AM	Download	Reject					
Test Member	11/02/2009 - 11/08/2009	09/04/2009 10:57 AM	09/04/2009 10:59 AM	Download	Reject					
Test Member	11/09/2009 - 11/15/2009	09/10/2009 11:56 AM	09/10/2009 12:01 PM	Download	Reject					
Test Member	11/23/2009 - 11/29/2009	09/22/2009 1:57 PM	09/22/2009 2:09 PM	Download	Reject					
Test Member	12/14/2009 - 12/20/2009	10/01/2009 11:59 AM	10/01/2009 12:06 PM	Download	Reject					

## **Supervisor In-Kind Hours**

#### Time Tracking > Supervisor In-Kind Hours

Site supervisors can track their in-kind match hours (the time the spend supervising the member) using the reports in the Supervisor In-Kind Hours submenu.

The standard pages for in the Supervisor In-Kind Hours submenu include::

Enter Supervisor In-Kind Hours Supervisor In-Kind Hours Report

You may also have to complete other reports that are specific to your program.

Not all programs require supervisors to track their in-kind hours, and some supervisor's may not be able to count their match hours if they are paid through federal funds.

If you have questions about supervisor in-kind hours, please contact your program director.

OME MANAGE	RECORDS 👻	REPORTING -	FINANCIALS -	TIME TRACKING 👻	DIRECTOR	RIES 🔻	CALENDAR	HELP -	
lome Nelcome Test				Member Service Hour Supervisor In Kind Ho	-		Page To upervisor In-Kind sor In-Kind Hours	Hours	🕒 Create PDF
Test Notification of E The following me Member	mbers have			enter notices that "stick" ( oval:	on the home		all system users	in their state	
Test Member		009 - 09/13/2009			10/02/2009			Review & Approv	e
Test Member	10/12/20	10/12/2009 - 10/18/2009			10/03/2009	/03/2009 Review & Approve			e
Test Member	11/30/20	009 - 12/06/2009			09/29/2009 Review & Ap		Review & Approv	e	
Test Member	12/21/20	009 - 12/27/2009			10/01/2009 Review & App			Review & Approv	e
Test Member	SAMPLE	E PERIOD: 08/25/20	000 - 09/07/2000		09/23/2009 Review 8		Review & Approv	e	
Test Member 2	09/28/20	009 - 10/04/2009			08/05/2009			Review & Approve	
Test Member 2	10/05/20	009 - 10/11/2009			08/20/2009	9		Review & Approv	e

## **Enter Supervisor In-Kind Hours**

#### Time Tracking > Supervisor In-Kind Hours > Enter Supervisor In-Kind Hours

If required by your program, site supervisors can track their match hours using the Supervisor In-Kind Hours timesheet system. Supervisor in-kind hours are entered into timesheets that are aligned with member time sheet pay periods so that when you receive the notification that your member's time sheets need approval, you should also submit your match hours for the same time period to your program director for approval.

To access an in-kind hours timesheet, select a pay period from the drop down menu and click *Choose*.

Total         9           7         8.25
7
· ·
8.25
9.5
4
5.25
7.5
4.25
3.25
6.5
6.25
20
12
13

Once you select a time period, a time sheet will appear. Just above the actual timesheet table is a text box where enter your loaded hourly wage (the hourly value of both your salary and your benefits). If you do not know your loaded hourly wage, talk to your human resources department. Once a loaded hourly wage has been entered into a supervisor in-kind hours timesheet, the value will carry over into all following in-kind

hours timesheets and does not need to be entered again unless that value changes. If you enter a new value into the loaded hourly wage text box, then the new value will appear in all subsequent in-kind hours timesheets in the loaded hourly wage text box. You can then enter the hours you worked with your members in the *Num Hours* column and describe those hours in the *Activity* column. Consult your program director if you have questions about how to fill out your in-kind hours timesheet.

Enter Superv	visor In-Kind Hours	
Select a Period	:	
11/30/2009 - 12	2/06/2009 saved: 10/02/2	2009 🗸
Choose		
You are enteri	ng time for period: 11/30	/2009 - 12/06/2009
This timeshee	et is DUE: 12/08/2009	
	our fully loaded hourly w	age including benefits
that is used to	calculate the value of yo	ur in-kind hours: \$ 25
Day	Num Hours	Activity
Mon Nov 30	0	
Tue Dec 1	0	
Wed Dec 2	5	Test description
Thu Dec 3	1	Test test
Fri Dec 4	6	Test
Sat Dec 5	0	
Sun Dec 6	0	
Totals:	12	
		I attest that the time recorded above is accurate and that the value of
		my time is verifiable and documented at my agency.
		I also attest that my time is not paid out of other federal funds
		and can be used as match for the AmeriCorps grant.
		Course and Drink Course Authorize and Calentik
		Save and Print Save Authorize and Submit

To save your hours so you can come back and edit the timesheet later, click the *Save* button. When you have entered all of you hours into the in-kind hours timesheet, click the *Authorize and Submit* button to send the timesheet to your program director for approval. After you click the *Authorize and Submit* button, a pop-up window will appear asking you to confirm that you want to submit your timesheet. In the pop-up window, click *OK* to send the timesheet to your program director or click *Cancel* to abort and return to editing your timesheet. Timesheets that have been submitted or approved are locked to prevent changes-though they may still be viewed-and will have a padlock icon

in the upper right corner.

The page	e at https://secure.oncorpsreports.com says:	×
?	Click OK to submit this timesheet to your Program Director for approval or Cancel to can	cel.
	OK Cancel	

# **Supervisor In-Kind Hours Report**

### Time Tracking > Supervisor In-Kind Hours > Supervisor In-Kind Hours Report

The Supervisor In-Kind Hours Report shows all of your match in-kind hours for each timesheet period as well as the year-to-date total for your match in-kind hours.

Period	Total
Aug 31, 2009 - Sep 06, 2009	9
Sep 07, 2009 - Sep 13, 2009	7
Sep 14, 2009 - Sep 20, 2009	8.25
Sep 21, 2009 - Sep 27, 2009	9.5
Sep 28, 2009 - Oct 04, 2009	4
Oct 05, 2009 - Oct 11, 2009	5.25
Oct 12, 2009 - Oct 18, 2009	7.5
Oct 19, 2009 - Oct 25, 2009	4.25
Oct 26, 2009 - Nov 01, 2009	3.25
Nov 02, 2009 - Nov 08, 2009	6.5
Nov 09, 2009 - Nov 15, 2009	6.25
Nov 16, 2009 - Nov 22, 2009	20
Nov 30, 2009 - Dec 06, 2009	12
Dec 21, 2009 - Dec 27, 2009	13
Year to Date Totals:	115.75

# **Directories**

You can edit your contact information, change your password, and find contact information for other people in your program under the Directories menu.

You can find the following pages under the Directories menu:

My Profile Search Directory Program Directory Member Roster

HOME MANAGE F		FINANCIALS -	TIME TRACKING -	DIRECTORIES -	CALENDAR	HELP -
				Search Directories		
<u>Home</u>				My Profile		ools 🛛 🕐 Help 🕒 Create F
Velcome Test				Program Directory		
veloome rest				Member Roster		
Fest Notification of Ev	ent from your friendly State Com	mission. Staff can e	enter notices that "stick"	on the home page for	all system user	h)n their state
The following men	nbers have submitted Time s	sheet(s) for appro	oval:			
Member	Time sheet(s) Period			Submit date		
Test Member	09/07/2009 - 09/13/2009			10/02/2009		Review & Approve
Test Member	10/12/2009 - 10/18/2009			10/03/2009		Review & Approve
Test Member	11/30/2009 - 12/06/2009			09/29/2009		Review & Approve
Test Member	12/21/2009 - 12/27/2009			10/01/2009		Review & Approve
Test Member	SAMPLE PERIOD: 08/25/2000 - 09/07/2000			09/23/2009		Review & Approve
Test Member 2	09/28/2009 - 10/04/2009			08/05/2009		Review & Approve
Test Member 2	10/05/2009 - 10/11/2009			08/20/2009		Review & Approve
The following men	nbers have late or missing ti	me cards for the	following payroll p	eriods:		
Member		Payroll P	Period			
Test Member			09 - 09/06/2009			
Test Member 2			09 - 09/06/2009			
Test Member 2			09 - 09/13/2009			
Test Member			09 - 09/20/2009			
Test Member			09 - 09/27/2009			
Test Member 2		09/21/20	09 - 09/27/2009			
The following men	nbers have unlocked Time s	heet(s):				
Member	Time sheet(s) Period	1-7-	Unlock date	Reason		
Test Member	10/05/2009 - 10/11/2009		09/04/2009	I am unlocking this ti	mesheet becau	se
Test Member 2	09/07/2009 - 09/13/2009		08/06/2009	TEst Unlock of Times	sheet	

### **My Profile**

#### **Directories > My Profile**

My Profile allows users to update their own basic contact information so that it is always up to date. Users can use this form to make any changes necessary to their basic contact information. Users can also use this form to change their passwords. When finished, select *Save* to save the report. Click on the *Save and Print* button if you would like to create a PDF of the report in addition to saving it.

First Name:	Test	Last Name:	Supervisor
Title:	Supervisor		
Site:	Test Service Site		
Email:	info@oncorpsreports.com		
Address:	none	Address 2:	
City:	none	County:	Select One 👻
State:	Select One 👻	Zip:	none
Phone:		Fax:	
Cell:			
Login:	supertest		
Password:	•••••	Verify Password:	•••••

# **Search Directory**

### **Directories > Search Directory**

The Search Directory page allows you to look up people in your program by either their first or last name. If someone's name matches your search criteria, a table will appear listing their name, user level, program and e-mail address.

Search Directories										
Search by First or Last Name:	Test Search									
Search Results										
Name	Туре	Program	E-Mail							
Test Member	AmeriCorps Member	Test Program	none							
Test Member 2	AmeriCorps Member	Test Program	test							

# **Program Directory**

### **Directories > Program Directory**

The Program Directory lets you look at your program in a hierarchical tree view. You can find contact information by expanding your program tree. Click on a folder to expand the list. You can view the contact information for people in the list by clicking on their name. A pop up window will appear listing that person's contact information.

Program Directory			
<ul> <li>Test Program</li> <li>Test Person (1 coordinator)</li> <li>Test Coordinator (3 service sites)</li> <li>Program Dummy Site (1 supervisor)</li> <li>Site Tester 2 (1 supervisor)</li> <li>Test Service Site (2 supervisors)</li> <li>Test Supervisor (2 members)</li> <li>Test Super 2 (1 member)</li> </ul>	)	Key: Program Program Di Regional Co Service Site Site Supervi AmeriCorps Client	oordinator isor
<ul> <li>Test Member 3</li> <li>Test Financial</li> <li>Test No Finances</li> <li>PD New Test</li> </ul>	OnCorps AmeriCor	ps - Demo Extranet - Mozilla Firefox 💷 💷	×
	First Name:	Test	
	Last Name:	Member 3	
	Email:	test	
	Address:	123 Main St	
	City/State/Zip:	Minneapolis, DM 55123	
	Phone:	123-123-1231	
	Fax:		
	Cell:		
	<u>Close Window</u>		

### **Member Roster**

#### **Directories > Member Roster**

The Member Roster report is an exportable report that shows all of the information stored in your members' records. The report that you export contains much more information than the report that is shown in the main OnCorps Reports interface.

Member Roster					
Member	E-mail	Status	Туре		
Test Member	none	Enrolled	Full-Time		
Test Member 2	test	Enrolled	Full-Time		

For instructions on how to export reports, please see the <u>Getting Started > Export</u> <u>Report Data</u> section of this tutorial.

[4 4 1 of 1 ▷ ▷	100% -	Find   Next	Select a format	🔻 Export 🔮 🎒		
OnCorps Reports" On task. On time. Online.	Member Roster					
Competitive						
F Test Program	Director First	Director Last	Coordinator First	Coordinator Last	Site Name	Supervisor First
	Test	Person	Test	Coordinator	Test Service Site	Test
	Test	Person	Test	Coordinator	Test Service Site	Test
10/3/2009 5:14:04 PM						

8	Home Insert Page Layout	Formulas Data Review	mer View Acrobat	nberRoster[2].xls [Compatibility	Mode] - Microsoft Excel				×
Paste	∦ Cut La Copy ∛ Format Painter Clipboard ☞ Font		◆ Wrap Text 課 課 通 Merge & Cen Alignment	ter × S × % → 50 +00 +00 +00 +00 +00 +00 +00 +00 +00		Cell yles - Cells	ormat 🖉 Clear 👻	Sort & Find & Filter * Select *	
	A1 • (* f*								×
123	A B	C D	E	F	G H		J	K	L A
- Te	4 5 Competitive Test Program	Member Roster	Director Last	Coordinator First	Coordinator Last	Site Name	Supervisor First	Supervisor Last	First Name
IT.	6	Test	Person	Test	Coordinator	Test Service Site	Test	Supervisor	Test
	7	Test	Person	Test	Coordinator	Test Service Site	Test	Supervisor	Test
	89								Ļ
	10							<b>— — —</b> 100% (=	•

# Calendar

You can access the calendar for your program by either clicking on the *Calendar* button on the blue menu bar or by clicking on the *Calendar* link at the bottom of each page.

To view event information, click on the event in the calendar and a pop up will appear with the information for that event. Make sure your browser is set to allow pop-ups. To go to the previous month, click on the link on the top left of the calendar with the name of the month previous to the one currently displayed. To go to the next month, click the link at the top right of the calendar with the name of the month following the one currently displayed.

October 2009 < September 2009 Calendar of Eve						November 2009 :	2
Sunday	Monday	Tuesday	Wednesday	Thursday 1 Test Member Event	Friday 2	Saturday 3	
4	5	Test Me	mber Event- 1 D-00 AM - 2:00F JRL	0/01/2009		e Bring a lunch!	
18	19	20	21	22 Test Member Event	23	24	
25	26	27	28	29	30	31	

# Help

The Help menu contains pages where you can find resources to help answer your questions about the OnCorps Reports system, including a tutorial, an FAQ, and a form to request assistance from OnCorps Reports. You can also send help tickets to OnCorps Reports at <u>help@oncorpsreports.com</u>.

The pages under the Help menu are listed below:

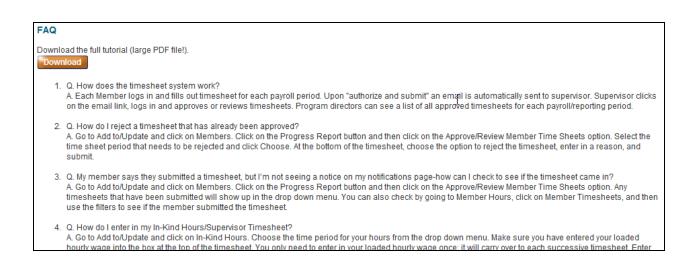
FAQ Request Help Form

### FAQ

#### Help > FAQ

The FAQ or Frequently Asked Questions is a list of answered questions that we have been asked. Before filling out a Request Help Form, it is a good idea to look through the FAQ to see if your question has already been answered. We update the FAQ as more questions come in.

You can also download this tutorial from the FAQ page by clicking on the orange Download button.



## **Request Help Form**

### Help > Request Help Form

Use the Request Help Form to report any problems with OnCorps Reports or for clarification about how a feature works. We will respond to these forms within 24 hours. If we feel that the comment or question entered into the form is a program or policy related question, we will forward the question to your Program Director.

Request Help Form				
	Do you have a question or comment? Please complete the form below and click Submit when you are done.			
	rease complete the form below and click submit when you are done.			
Name:	Test Supervisor			
Email:	info@oncorpsreports.com			
Phone:				
Select your Program:	Select One 👻			
Enter your comment or question:				
	Submit Cancel			
NOTE: If you are having problems submitting this	s form,			
lease e-mail help@oncorpsreports.com.				