Tab 1

TeamKinetic

Midweek MasterClass Series

Log your volunteer hours like a pro and stay on top of your engagement stats and reporting

As your programme grows, so will the number of volunteers and the number of sessions and pretty soon you'll have hundreds of hours that need to be logged. That can feel overwhelming but there are excellent functions in TeamKinetic to help. Learn how to log hours from individual hours for a volunteer, right up to all the hours in one click!

Course Length 1 Hour

Introduction

TeamKinetic uses the hours that have been logged for many of its core reporting and engagement tracking. It is therefore important that providers and administrators perform regular checks to ensure that the hours that volunteers have logged are correct and confirmed.

There are, as always, multiple ways to achieve this ranging from logging individual hours on individual sessions for individual volunteers to logging all the outstanding hours across the whole system with one click!

Feedback for volunteers and from volunteers is also intrinsically tied to the first logging event of any opportunity and we'll be mentioning how to perform that feedback at the same time and how to update/add to the feedback as time goes on.

This Masterclass is designed for both administrators and providers and is a valuable refresher for both.

What You'll Achieve in This Masterclass

- Understand the difference between a volunteer logged hour and a provider/administrator logged hour.
- Understand what hour reports are telling you and which hour totals they are using.
- Be able to monitor and report on deleted volunteer hours.
- Understand what happens to logged hours when volunteers leave or are removed from opportunities.
- Log hours in bulk across the system.
- Log hours for individual volunteers or opportunities.
- Learn how feedback fits in with logging hours.

Volunteer and Provider Logged Hours

TeamKinetic maintains a full audit of both the hours that a volunteer logs and the hours that a provider/administrator logs.

This enables us to constantly monitor differences between the totals and helps to resolve potential discrepancies. Additionally, the volunteer logged hours history gives you the opportunity to quickly log hours without requiring you to log individual sessions and volunteers.

In TeamKinetic the provider/administrator logged hours are the definitive hour totals, and are used for reporting, HourTrade and other hour exchange programmes. So it's important that providers and administrators monitor the hour logging in order to get the most accurate reporting and engagement data.

How to Find Out What Hours are Outstanding

Ideally, you will check in regularly with your opportunities after sessions have completed and the attendance and number of hours for each volunteer is fresh in your mind. This is not always possible and for flexible opportunities, or at home opportunities, may never be possible.

The quickest way to get a snapshot on how many hours are outstanding for which volunteers on which opportunities is using the bulk log page.

You can find this at VOLUNTEER MANAGEMENT > LOG ALL HOURS.

This page summarises all the hours logged by volunteers and providers, and the available hours for all volunteers that have outstanding hours to log.

You can sort this table by volunteer, provider (for administrators), opportunity or total of outstanding hours.

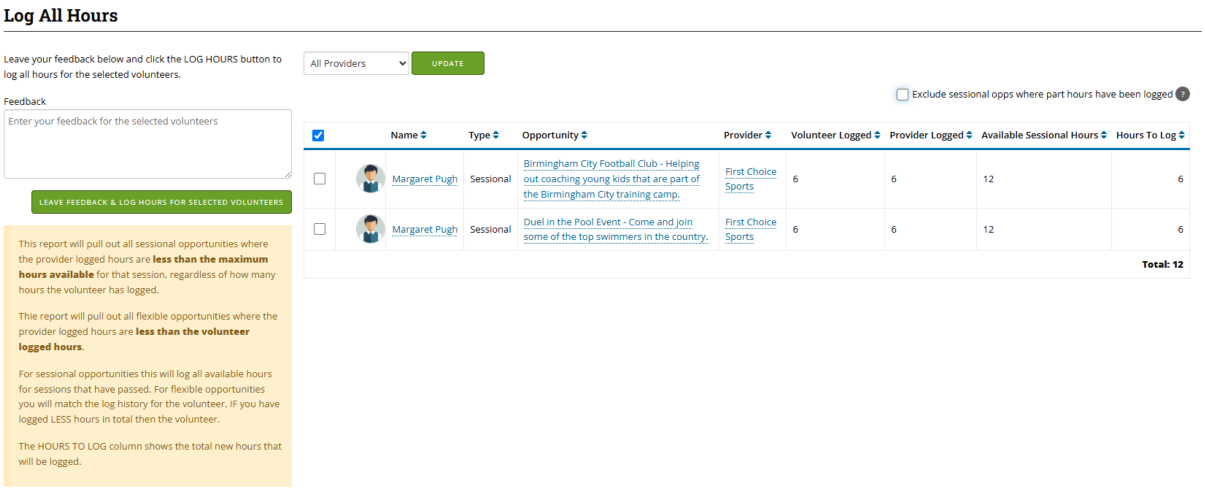
Even if you do not wish to bulk log hours, this is the best page to find out where your gaps in logging are.

Additionally individual log events are included in your dashboard under the What's Been Happening' since you last logged in section. They will list the volunteers that have logged hours, how many they have logged and on what opportunity.

Bulk Logging Hours

As well as being a great place to get a quick overview of what hours are outstanding, the log all hours page is where you can effortlessly and quickly log al outstanding hours across all your opportunities and volunteers.

You can find this page at VOLUNTEER MANAGEMENT > LOG ALL HOURS in the top menu.



There are a few important things to remember when logging all hours in this way, and they are mostly related to the different mechanisms for logging hours between flexible and session based opportunities. The yellow info box on the page describes these and it's always worth double checking before you hit the log hours button to make sure you get the desired results

Bulk Logging Sessional Hours

Each session has a fixed duration which is the maximum hours loggable for that session, you may have seen this when creating sessions or logging hours for individual sessions. A volunteer can only log upto this maximum when they are logging their own hours. The bulk logging function will always log the maximum hours available for all the past sessions in an opportunity.

By default when you open the log all hours page, it will list all volunteers that have logged none or less than the maximum hours on a session, and where the provider or administrator has yet to log any hours.

Check out the tooltip for the option at the top right of the table 'Exclude sessional opps where part hours have been logged' which is selected by default. If you deselect this option, it will also display those volunteers that have logged none or less than the maximum hours, and where the provider or administrator has also logged none or less than the maximum available.

That's a little hard to describe so let's break it down with some examples.

Beth has attended a session and has logged the maximum 5 hours for that session.
The provider has not yet logged any hours, the display will show this;

Volunteer	Vol Logged	Pro Logged	Available	To Log
Beth	5	0	5	**5**

As the provider or administrator have yet to log any hours, this row would show whether the option to hide part logged hours is checked or not.

The maximum available hours for that session is 5 hours so that is what would be logged if you selected this row and hit the log button.

For Beth's next completed session, they log 5 hours again but this time the provider has logged 3 hours, as Beth had to leave early. The display for that opportunity would be like this;

Volunteer	Vol Logged	Pro Logged	Available	To Log
Beth	5	3	5	**2**

There are two hours left to log for this session, however, as the provider has already logged some hours, this row would be excluded if the option to exclude part logged hours was enabled.

This safety mechanism is included to prevent overwriting the choice of a provider to log less hours than the maximum.

TIP: By default the log all hours page will exclude sessions in opps where some hours have been logged by the provider or administrator.

Bulk Logging Flexible Hours

Flexible opportunities have no discrete sessions, each with a maximum number of hours possible to log, but a history of hour log events by the volunteer, each with a date and a

number of hours.
So the system has no fixed criteria to calculate what hours are outstanding and instead, when bulk logging, will match the volunteer flexible log history IF the provider/administrator logged hours are less than the volunteers for that opportunity.

For flexible opportunities the available sessional hours total will be missing as it's meaningless for these types of opportunities.

So if Beth had logged a total of 10 hours so far on a flexible opportunity and the provider had so far logged zero hours, the display for that opportunity would look like this;

Volunteer	Vol Logged	Pro Logged	Available	To Log
Beth	10	0	---	**10**

If Beth had logged a total of 10 hours and the provider had logged 10 or more hours the display for that opportunity row would like this;

Volunteer	Vol Logged	Pro Logged	Available	To Log

That's right, it wouldn't be shown at all as the provider or administrator had logged more hours than the volunteer so there are zero outstanding hours to log.

Log All the Outstanding Hours

Make sure you read the notes and the tooltip for the exclude option before logging any hours.

Select the volunteer opportunities you wish to log or hit the check box at the top left of the table to select all volunteers and all opportunities.

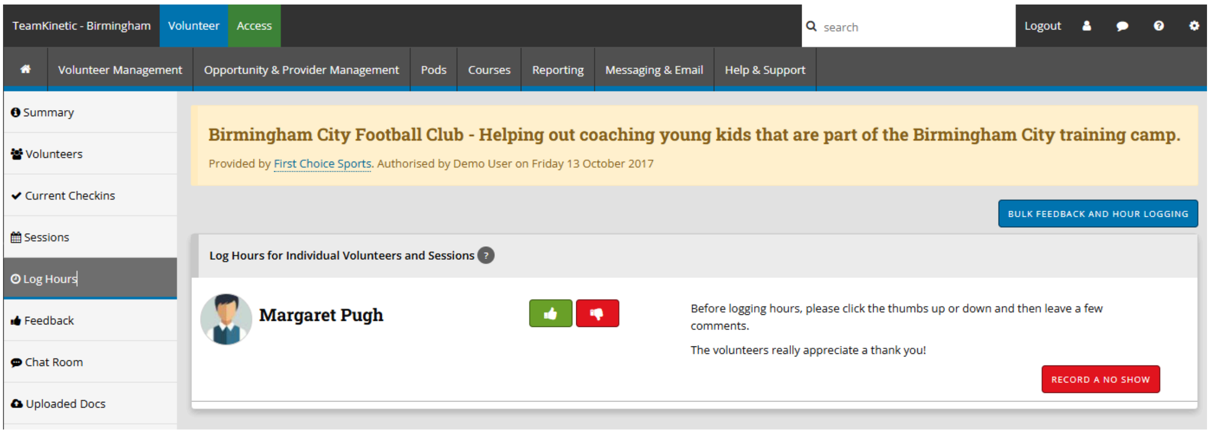
Enter some feedback which will be added to all the volunteers where feedback has not already been left and then hit the big green button!

All the outstanding hours will be logged and feedback added where it was missing . That's it, you are done and all your hours have been logged and recorded and you are up to date!

Logging All Hours for an Opportunity

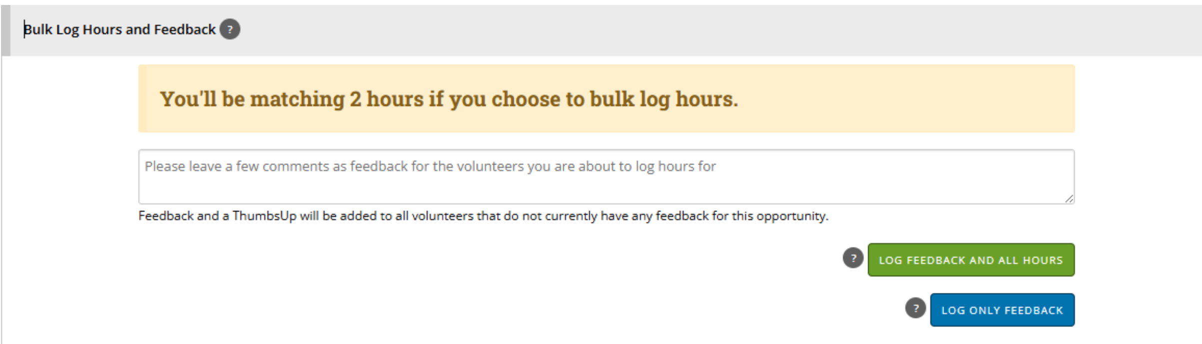
When you are managing any opportunity you'll see a LOG HOURS section in the left hand menu. If you give this a click you'll be presented with a list of all the volunteers on the opportunity along with a running total of the hours the volunteer has logged and the hours the provider or administrator has logged.

To bulk log hours for the whole opportunity look for the BULK FEEDBACK AND HOUR LOGGING button towards the top right of the page.



Clicking this button will reveal if there are any outstanding hours to log. Similarly to the bulk logging for all opportunities described above, this will only include those sessions when the provider has not yet logged any hours.

You'll get a view like the below listing the hours that are still outstanding and an option to either leave feedback and log hours, or, just leave feedback.



Just as with the bulk log process for all opportunities, the feedback you enter will only be added to those volunteers without any feedback.

If you hit the log feedback and all hours button, every past session that has not yet had any provider or administrator logged hours, will have the maximum hours available for that session logged.

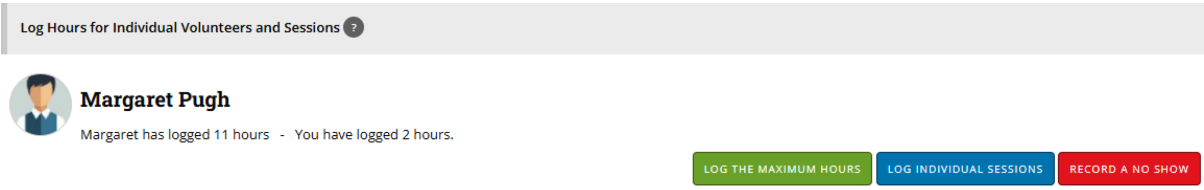
TIP: Remember, using the bulk logging features it is not possible to log different hours for different sessions, it is always the MAXIMUM house available for that session that is logged or the same number of hours logged by the volunteer for flexible opportunities.

Bulk Logging Individual Hours

It is possible to log all the outstanding hours for an individual on an opportunity. Hit the LOG HOURS section for any opportunity management page and you will see a list of all the volunteers on the opportunity along with a running total of the hours they and you have logged.

If you have not yet left feedback for the volunteer you will see the familiar thumbs up/down icons and will need to leave this feedback before being able to log any hours for this individual.

You'll see something like this once you have left feedback;



To bulk log the outstanding hours just hit the LOG THE MAXIMUM HOURS button. This will log the maximum hours available for all the sessions so far that the volunteer has attended for those sessions where you have not yet logged any hours. This is identical behaviour to the other bulk log processes.

For flexible opportunities this will match the hours and history that the volunteer has logged, unless you have logged more than the volunteer, in which case the bulk logging will have no effect. This will **REPLACE** your flexible log for that volunteer with theirs.

TIP: Remember, for this and all the bulk logging processes, it will ignore those sessions where you have already logged hours, even if they are less than the maximum available for that session.

Logging Individual Hours

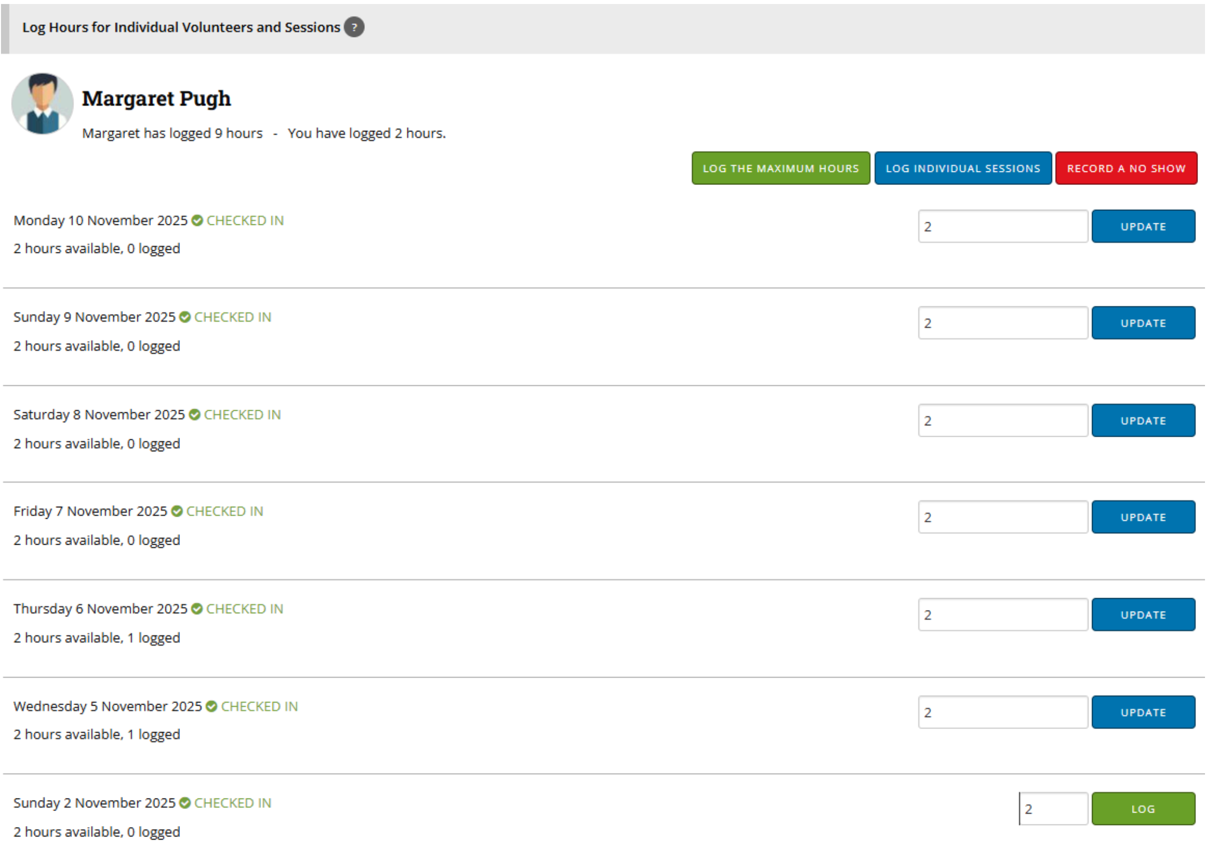
Although using the bulk logging tools is fast and super simple, it's also a very blunt tool and assumes the volunteer is attending for the entire duration of the session, or is accurately recording the hours for a flexible opportunity.

If this is not the case then you may need to log individual sessions and volunteer hours. It's still pretty easy but obviously more time consuming.

Logging Hours for Sessional Opportunities

When viewing the LOG HOURS section for any opportunity you will see a list of all the volunteers on the opportunity and a running total of the hours they and you have logged.

To log individual sessions hit the LOG INDIVIDUAL SESSIONS button and a panel will open with all the past sessions the volunteer has attended, something like this.



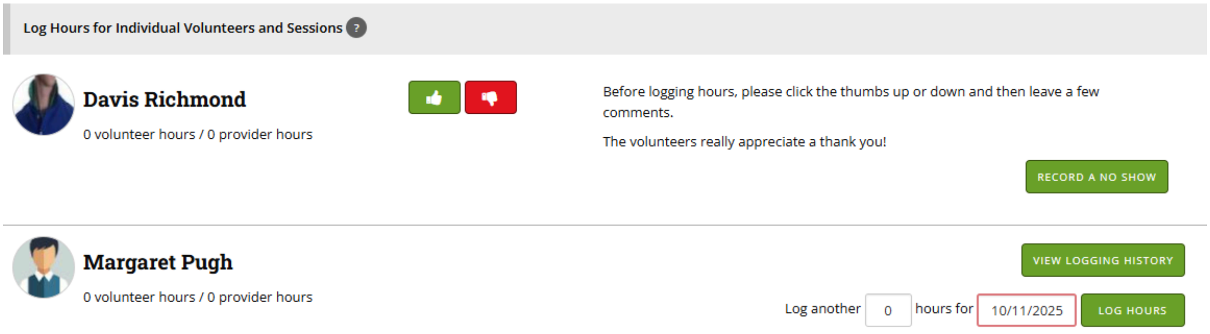
If you have already logged hours for a session you will see the update button here you can change the hours you have already logged. If not you will see the log button and the box will default to the maximum hours available for that session.

Simply hit the update or log buttons to log the number of hours shown and they will be added to the total. Importantly for bulk logging hours, this also records that you have logged some hours so by default that session will be excluded from the bulk logging actions.

Logging Hours for Flexible Opportunities

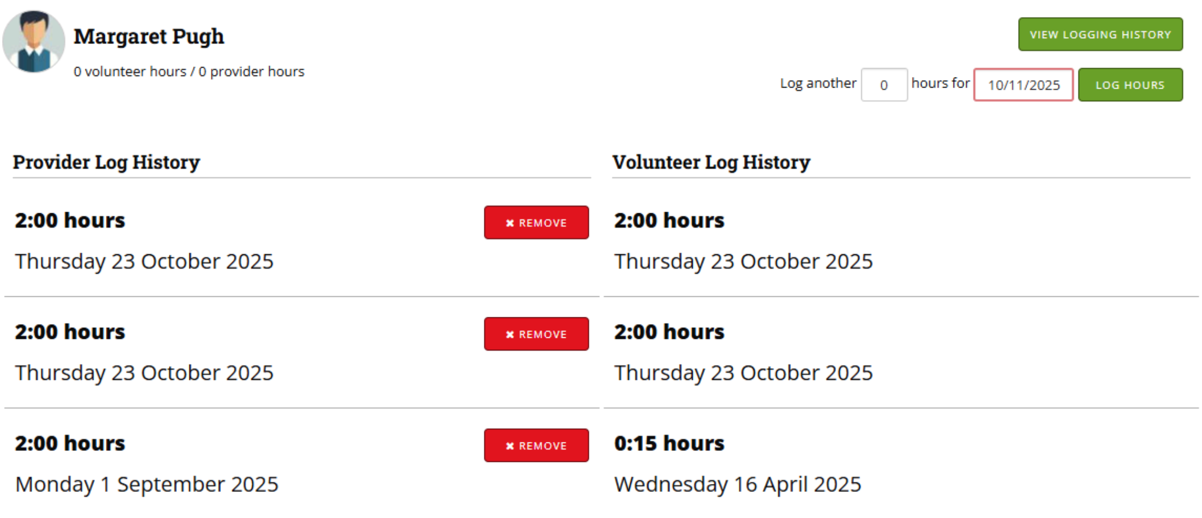
The volunteer should be logging hours as they go for flexible opportunities as there are no discrete sessions to log hours against.

This forms a history of hours logging for the flexible opportunity and when viewing the LOG HOURS section you'll see something like this;



As before, if you have yet to leave feedback for a volunteer you'll see the thumbs up/down icons and will need to complete that before logging any hours.

If you hit the view logging history button you will see on the left, a list of all the log events by you and on the right, all the log events by the volunteer. They won't necessarily match, as you may have entered different dates to assign the hours to. You'll see something like this;



For the best accuracy in reporting we would encourage you to log as many events as possible rather than rolling them all into a single log for a single date, which is not very representative of the reality. The volunteer may have spent four months on the flexible opp and logged a total of 50 hours, but if you log them all in one go, to one date, then they will all appear together in any reporting for that single date, but they are actually spread over four months.

To add another entry in the flexible log history just enter the number of hours and the date and it will be injected into the log. You can also remove a log entry by hitting the red REMOVE button.

Keywords to Know

Active Volunteer: A volunteer who has logged hours on a flexible opp or attended a session within the given timeframe.

Flexible Opportunity: An opportunity that only has a start and end date. There are no individual sessions and volunteers co-ordinate their own timetable with the provider.

Logged Hour: An hour that has been logged against an opportunity. This can be by a volunteer or a provider/administrator. A separate total of the hours logged by the volunteer and the provider/administrator is always maintained.

Opportunity: A general term for any volunteer activity or task listed in TeamKinetic. Opportunities may be ongoing or time-specific, sessional or flexible.

Provider: A user that can add opportunities to TeamKinetic and can only manage those opportunities. They only have access to their opportunities and volunteers.

Self-Managed Opportunity: A simple opportunity advert that is managed directly by the provider using their systems and not within TeamKinetic. The volunteer is directed to the provider's website for their onward journey from the opportunity details page.

Sessional Opportunity: An opportunity with pre-defined sessions with a date, start time and duration. A sessional opportunity can have as many sessions as you like.

Tooltip: A small question mark icon that when clicked gives some help.

Where to Find Help

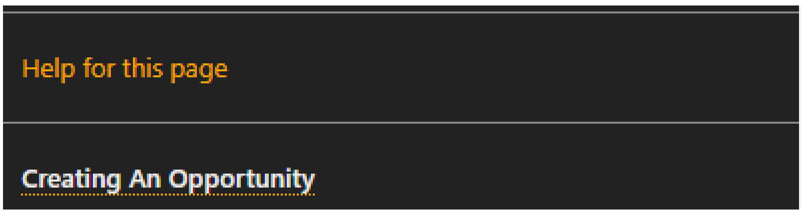
So much help! Your first stop should be the Help & Support menu with numerous videos, guides and tutorials. You can find quickstart guides for our newer users and tutorials for experienced users looking for help on more advanced topics.

You'll also find all the handbooks for the masterclasses in the Extra Training section, so you don't have to wait for a midweek masterclass to get the help you need.

If you want to ask your peers a question about how they have solved a problem you have or for their advice on how best to use TeamKinetic you can use the Peer Help & Chat area to post your question. Don't forget to answer someone else's question if you can! You can subscribe to the channels in Peer Help & Chat and receive notifications when a new question or response is added.

Throughout TeamKinetic you will notice little grey circles with question marks like this ?, that turn green when you hover your mouse over them. If you click the question mark you'll get some help about whatever you are currently looking at, like a form field.

You can also get contextual help about the page you are using by hitting the question mark icon towards the top right of your menu bar. You'll see a slide-out bar with a section like this;



With a list of help topics relevant to the functions you are currently accessing. Just click the topic of interest to get the help you need.

This slide-out bar also has some links to the guides and tutorials and a search bar where you can search for all the help available for any topic. Just type the search term in the box and hit the SEARCH button and all the available help will appear.

If you can't find the help you need you can open a support ticket. Please include as much detail as possible, including the link/id for any opportunities, providers or volunteers the question relates to. You'll get an email notification and an in-app notification when you have a reply.

If it's urgent we also have instant chat available where you can talk directly to one of the team, that can try and help you right there.

Glossary

Here are some terms we use in our masterclasses and other training and instruction materials. It's a good idea to familiarise yourself with them, though you'll probably recognise most of them already!

Achievement Badges: These are auto-awarded badges based on the number of hours a volunteer has logged. Super admins can alter the badge image and the number of hours required.

Active Volunteer: A volunteer who has logged hours on a flexible opp or attended a session within the given timeframe.

Admin: The user level one down from the Super Admin. Admins cannot access the Super Admin menu but can access all the other areas of TeamKinetic.

Award Badges: Fully customisable badges that can be admins can be awarded to any volunteer anytime. You can define as many award badges as you wish.

Background Check: In the UK these used to be known as CRBs (Criminal Records Bureau), but since 2012 are now termed DBS (Disclosure and Barring Service). In Scotland, they are called PVG (Protecting Vulnerable Groups) checks.

Categories: Customisable groupings used to organise opportunities by type or theme (e.g., Environmental, Education, Sports).

Dashboard: The central hub where users can view and manage their activities, messages, and settings. Administrators see additional management tools.

Event: A collection of opportunities grouped under a single occasion or purpose, often associated with a specific date or time frame.

Flexible Opportunity: An opportunity that only has a start and end date. There are no individual sessions and volunteers co-ordinate their own timetable with the provider.

Groups: Customisable collections of volunteers, grouped based on shared characteristics, allowing administrators to manage and communicate with them collectively.

Homepage: This is the first thing your volunteers or anyone browsing your website will see.

Menu: The strip of options across the top of the screen gives you to access the various functionalities of TeamKinetic.

Opportunity: A general term for any volunteer activity or task listed in TeamKinetic. Opportunities may be ongoing or time-specific, sessional or flexible.

Opportunity Badges: Fully customisable badges that are assigned to opportunities so volunteers can easily recognise types of opportunities, like for instance, Duke of Edinburgh suitable, suitable for English Learners, suitable for people with access requirements and so on. You can define as many opportunity badges as you wish.

Opportunity Tag: A word or short phrase that is attached to an opportunity that helps volunteers find the right opportunity for them when searching. Super admins are able to manage tags and repair broken or misspelt tags or merge similar tags.

Pod: A collection of providers whose opportunities are managed by a pod admin.

Pod Admin: Similar permissions to the regular admin but they can only manage opportunities that providers within their pod have added.

Provider: A user that can add opportunities to TeamKinetic and can only manage those opportunities. They only have access to their opportunities and volunteers.

Resolution: The number of pixels in an image or picture. The higher the number the better the quality and larger the file size.

Resource Area: Super admins can upload files and add documents to the volunteer resource area which are then shown in the volunteer's document hub in their dashboard.

Role: Roles are a collection of tasks that must be completed before a successful role status can be conveyed to the volunteer. The volunteer has to fulfil the criteria once and then can join any opportunity in that role without any further application.

Section Menu: The left-hand menu that is present on some pages that have lots of functionality. You access each section by clicking its title in the section menu.

Self-Managed Opportunity: A simple opportunity advert that is managed directly by the provider using their systems and not within TeamKinetic. The volunteer is directed to the provider's website for their onward journey from the opportunity details page.

Sessional Opportunity: An opportunity with pre-defined sessions with a date, start time and duration. A sessional opportunity can have as many sessions as you like.

Super Admin: The TeamKinetic user with the highest privileges. They have access to all areas of TeamKinetic.

Super Admin Menu: Indicated with a cog icon in the top right of the screen. This is only viewable and accessible by super admins.

Tooltip: A small question mark icon that when clicked gives some help.

Transactional Email: An email sent to volunteers in response to an action, like joining an opportunity. These are not unsolicited they are always sent regardless of the volunteer's unsolicited email preference.

Unsolicited or Bulk Email: An email sent without any associated transaction, it could be either an ad-hoc email sent from the volunteer's profile or search page or a bulk email sent to many volunteers. Volunteers can opt out of receiving such emails.

Volunteer: An individual who registers on TeamKinetic to participate in activities and contribute their time and skills.

Waiting List: A list of volunteers who wish to participate in an opportunity that has reached its capacity.