



# VolunteerMatters Kiosk Quick User Guide

Version 2.0

## VolunteerMatters Kiosk: Quick User Guide

You may run a kiosk from a desktop, laptop, tablet or smart phone so that volunteers may login, sign-up and withdraw from shifts, sign-in and sign out of any shift, and tracking their actual times versus scheduled.

The Kiosk add-on must be enabled by VolunteerMatters Support for your VolunteerMatters Pro and Up systems.

Once activated in your system if you log into VolunteerMatters with the “Volunteer Administration” or “Admin: Power User” site user access roles you can edit the calendar’s “Kiosk Mode”.

Click on Admin > [Volunteer Calendars](#).

Then click “edit” on the calendar you wish to modify.

The screenshot shows the VolunteerMatters Admin interface. At the top, there's a header with the organization logo and navigation links. Below that, a section titled "Volunteer Calendar Administration" contains a table of active volunteer calendars. A red arrow points to the "edit" icon for the "Soup Kitchen" calendar.

Name	Description	Allow On-Behalf-Of	Allow Volunteer Comments	Lock-in Days	Lock-out Days	Status	Time Zone	Actions
1 Elementary Before and After School Care	This is a demo calendar for YMCA before/after school care program for children grades K-5.	false	true	0	0	Active	America/New_York	<a href="#">edit</a> <a href="#">shifts</a> <a href="#">admins</a>
2 Soup Kitchen		false	false	0	0	Active	America/New_York	<a href="#">edit</a> <a href="#">shifts</a> <a href="#">admins</a>
3 Food Matters		false	false	0	0	Active	America/New_York	<a href="#">edit</a> <a href="#">shifts</a> <a href="#">admins</a>
4 Restaurant		true	false	0	0	Active	America/New_York	<a href="#">edit</a> <a href="#">shifts</a> <a href="#">admins</a>
5 Demo Project		false	false	0	0	Active	America/New_York	<a href="#">edit</a> <a href="#">shifts</a> <a href="#">admins</a>
6 Sample Volunteer Calendar		false	true	0	0	Active	America/New_York	<a href="#">edit</a> <a href="#">shifts</a> <a href="#">admins</a>

Once you click “edit” you can then scroll down to the “Kiosk Mode” drop-down field and select one of the following:

1. None
2. Attendance
3. Relaxed
4. Strict

**Edit Volunteer Calendar**

\* Name: Soup Kitchen

\* Status: Active

Description:

\* Lock-in Days: 0

\* Lock-out Days: 0

\* Time Zone: America/New\_York

\* Display Order: 0

\* Allow On-Behalf-Of: false

\* Allow Volunteer Comments: false

\* Hide Volunteers: false

\* Allow Waiting Lists: false

\* Kiosk Mode: Relaxed

External Link 1:

[show more](#)

Property	Use Matching	Match	Required
Status	false	Any	false
Interests	false	Any	false
Types	false	Any	false

Cancel Save DELETE

powered by **volunteermatters**

All calendar shifts will appear in the opportunities list. Their functionality past simply signing up or withdrawing depends on the mode selected.

The functionality of each mode is as follows:

1. **None:** Volunteers may not sign-in or sign-out of opportunities they are signed up for via the kiosk. They will not appear in the “Today’s Assignments” area. The no-show flag defaults to “false”. As it is currently you must manually mark an assignment as a no-show.
2. **Attendance:** The kiosk will track volunteer attendance to this project calendar. The Volunteer can sign-in and out via the kiosk and those sign-in and sign-out times will be appended to the Volunteer Interaction notes but the interaction start/end time will be the shift default. The no-show flag defaults to “true” so you must sign in to receive credit.
3. **Relaxed:** The kiosk will record sign-in and sign-out times for the volunteer, but will default to the opportunity end time if the volunteer does not sign out. The no-show flag defaults to “true” so you must sign in to receive credit.
4. **Strict:** The kiosk will record sign-in and sign-out times for the volunteer, but will not give the volunteer credit for the volunteer time unless they sign out of the kiosk to have the sign-out time recorded. The no-show flag defaults to “true” so you must sign in to receive credit.

## Default Kiosk Timing Settings

There are also three default system settings for use with the kiosk. They are:

- Shift Sign In Window Before Start
- Shift Sign In Window After Start
- Shift Sign Up Limit After Start

They default to 60, 30, and 15 minutes respectively. These are set globally and cannot be modified on a per calendar basis.

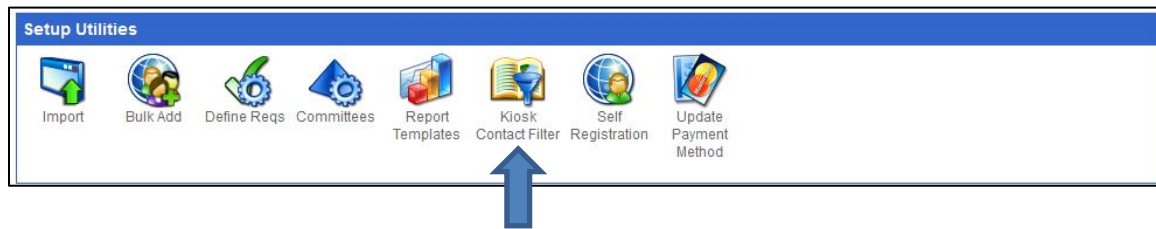
These settings allow a time period around a shift’s start time where a volunteer can still sign up for a shift via the kiosk or if they are already signed up, what time before and after a shift’s starting time that they are allowed to sign in.

## Kiosk Contact Filter

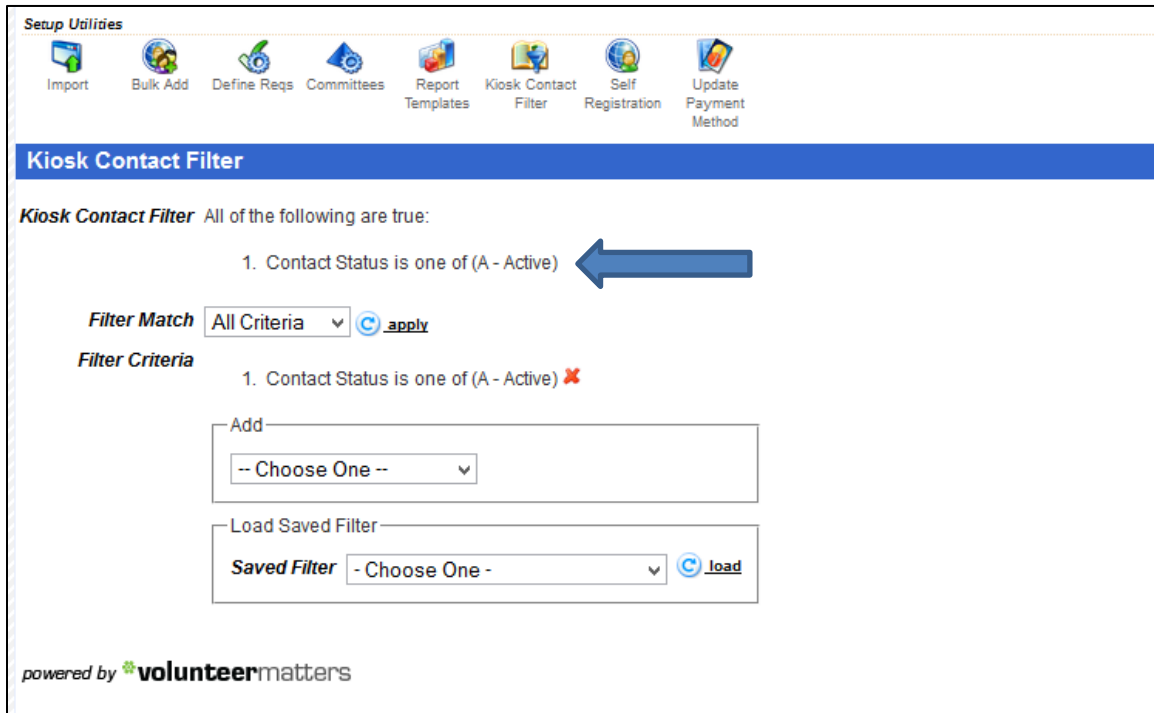
You can also set a Kiosk Contact Filter where you can define a filter that determines which contact records will appear in the kiosk as volunteers. For example you may have a large list of contacts no longer with the organization that you wish to exclude as volunteers displayed during a search.

To set the filter you must log into the system with the proper privileges (typically the

“System Setup” or “Admin: Power User” site user record security access roles) and click on Setup > [Kiosk Contact Filter](#) (under Setup Utilities section).



Then you simply create a basic contact filter based on the criteria desired. Typically this would be by contact status. In the example below, the filter is set to only return those contacts to the kiosk who have a status of “A – Active”.

A screenshot of the 'Kiosk Contact Filter' configuration page. The page has a blue header bar with the text 'Kiosk Contact Filter'. Below the header, the text 'Kiosk Contact Filter All of the following are true:' is displayed. Underneath, there is a list of filter criteria: '1. Contact Status is one of (A - Active)'. A large blue arrow points from the right towards this criterion. Below the list, there are two sections: 'Filter Match' and 'Filter Criteria'. The 'Filter Match' section has a dropdown menu set to 'All Criteria' and a button labeled '.apply'. The 'Filter Criteria' section has a list of criteria: '1. Contact Status is one of (A - Active)'. Below this, there are two input fields: 'Add' and 'Load Saved Filter'. The 'Add' field has a dropdown menu set to '-- Choose One --'. The 'Load Saved Filter' field has a dropdown menu set to '- Choose One -' and a button labeled '.load'. At the bottom left of the page, it says 'powered by volunteermatters'.

For more information on creating filters within VolunteerMatters click [here](#).

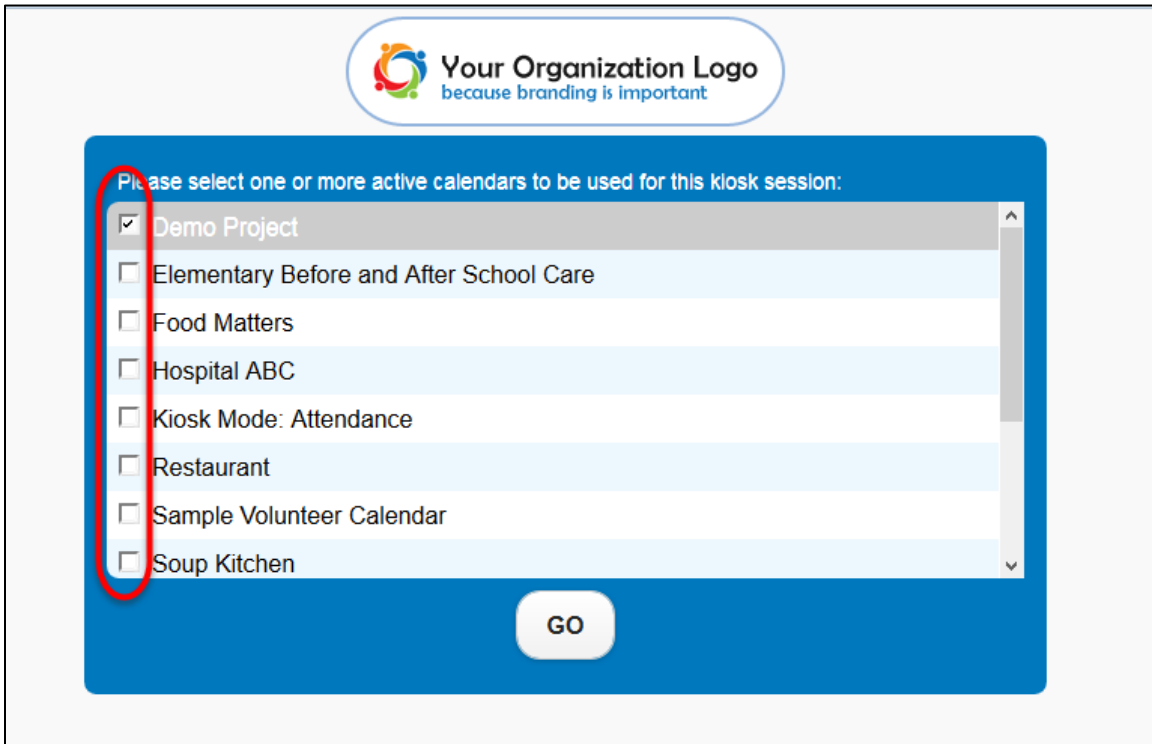
## Starting a Kiosk Session

To start a kiosk session, open a browser window on your iphone, ipad, desktop or laptop device and enter the following URL:

<https://www.volunteermatters.net/kiosk/{customercode}> where {customercode} is your customer code. For example if the code was "demo" (without quotes), your URL would be <https://www.volunteermatters.net/kiosk/demo>.

The initial page will require a login. The account logging in must have the Kiosk Admin permission/role assigned to it. Please contact VolunteerMatters support via [the support portal](#) for more information on Kiosk Admin access.

Once logged in, the initial screen will display a list of all active calendars from your VolunteerMatters system where the administrator must select via checkbox one or more calendars to be used for that kiosk session. Your VolunteerMatters system icon will display in place of the temporary logo below.




Once the calendars are selected you will click 'Go' to start the session. **NOTE:** To change the calendars used for an existing session you can enter the following URL:

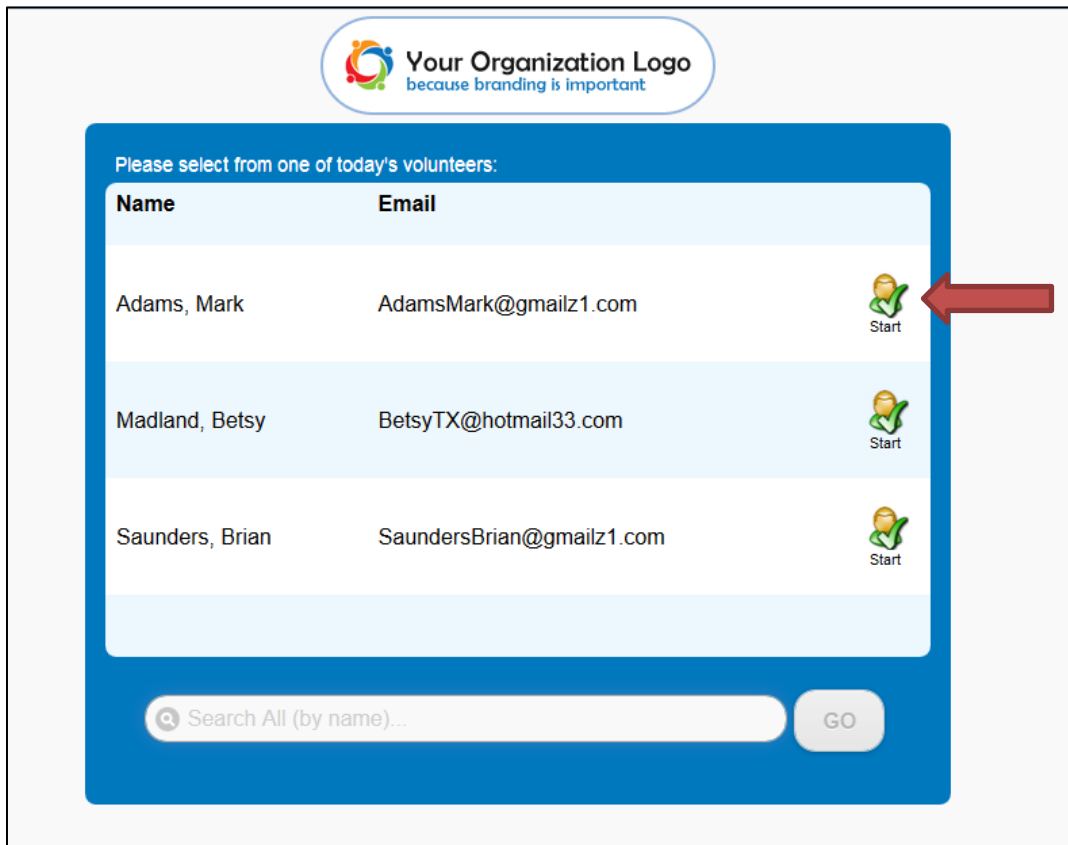
<https://www.volunteermatters.net/vm/kiosk/Main.do#kiosk-calendar-select>.

This will bring the admin back to the main screen and they can adjust the calendars and




click “Go” again. You can also close the browser window to end the session and start over.

From here you are administratively logged into the kiosk. On the main page, it will list all volunteers who currently have a shift for today so they can quickly locate their name

and start their kiosk contact session (  ) and sign themselves in, as well as peruse available shifts to sign up for in the selected calendar(s).



The screenshot shows a kiosk interface with a header area containing a logo and the text "Your Organization Logo because branding is important". Below this is a blue box with the text "Please select from one of today's volunteers:". Inside the blue box is a table with two columns: "Name" and "Email". The table lists three volunteers: Adams, Mark (AdamsMark@gmail1.com), Madland, Betsy (BetsyTX@hotmail33.com), and Saunders, Brian (SaundersBrian@gmail1.com). To the right of each row is a "Start" button with a kiosk icon. A red arrow points to the "Start" button for Mark Adams. Below the table is a search bar with the text "Search All (by name)..." and a "GO" button.

Name	Email	Start
Adams, Mark	AdamsMark@gmail1.com	 Start
Madland, Betsy	BetsyTX@hotmail33.com	 Start
Saunders, Brian	SaundersBrian@gmail1.com	 Start

Search All (by name)... GO

On the following pages it will discuss the process once you click “Start” and are logged in as that contact in more depth

Below the list of today’s volunteers is the search mechanism for volunteers not already assigned to a shift for today on the selected calendar(s).




The screenshot shows a search bar with the text "smith" and a "GO" button. There is also a close button (X) next to the search bar.

smith GO

Volunteers or administrators can enter a contact's name and then be presented with a list of results. Currently the search is a simply quick search. There is planned development to allow more complex search functionality for a future release.

The search results will then list all records returned matching the criteria and then the

volunteer administrator or administrator will click the Start icon (  ) for the appropriate contact.



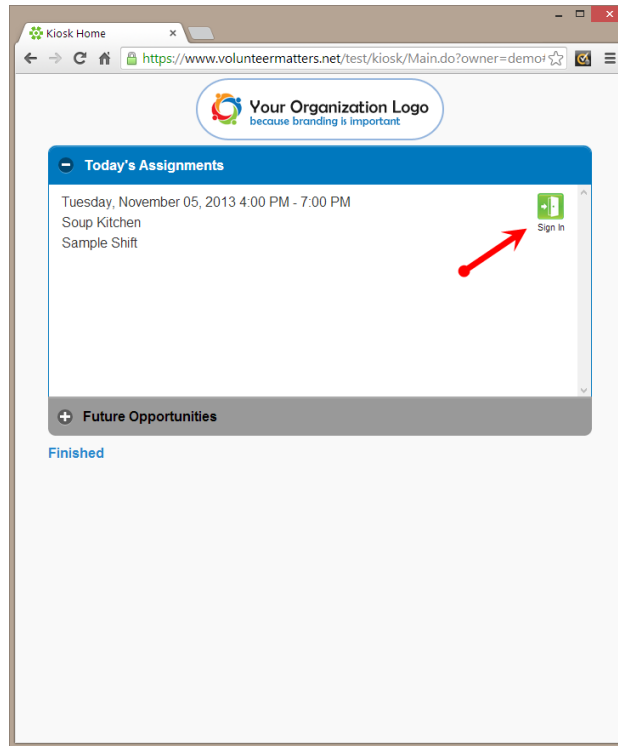
After clicking start you are now “logged” in as that volunteer and there are two views available to you:

1. Today's Assignments - where a volunteer can sign in or out of already assigned shifts.
2. Future Opportunities – where a volunteer can view upcoming shifts and sign up for available shifts, waitlist for shifts (if available), or withdraw from shifts already signed up for.

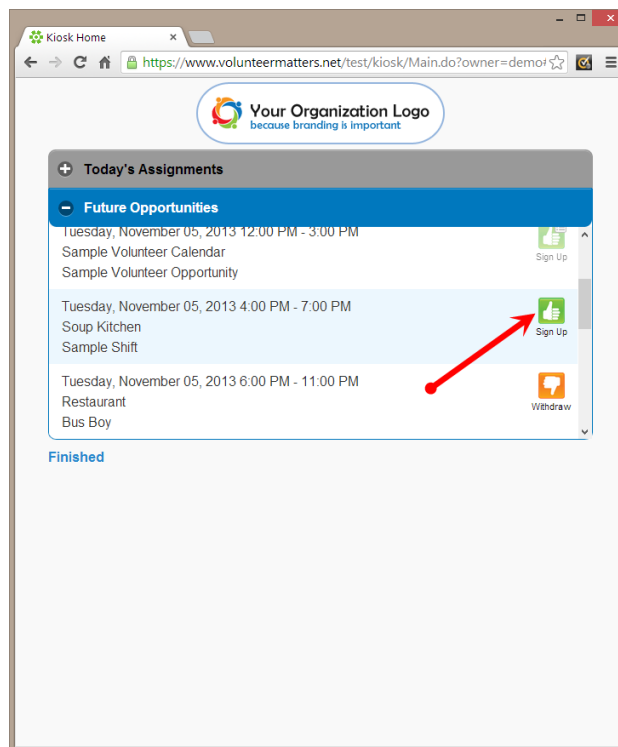
It will default to “Today's Assignments” if there is a shift occurring on that day for the volunteer logged in. If no assignment is present that day it will default to “Future Opportunities”.














## Today's Assignments



## Future Opportunities

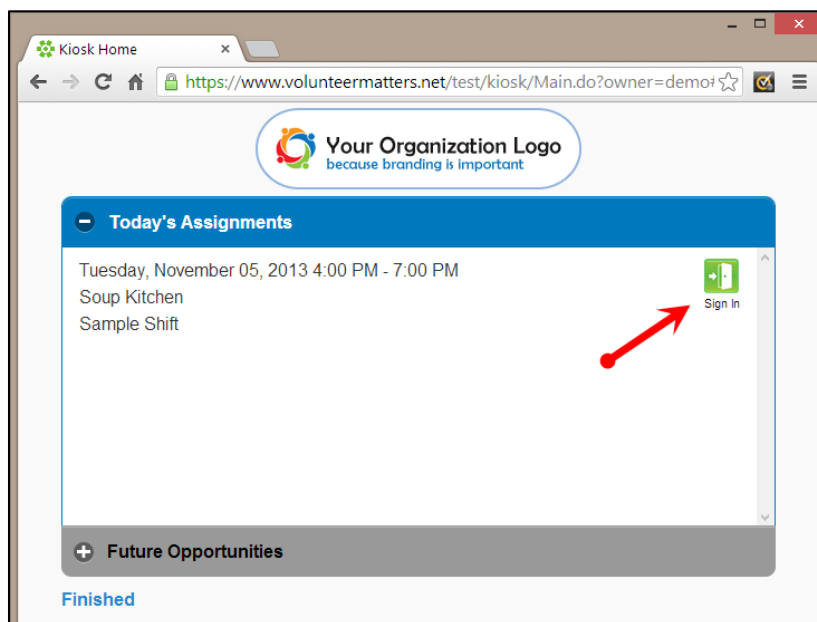


There are a number of icons available to the volunteer for their assigned shifts or available shifts. They are as follows:

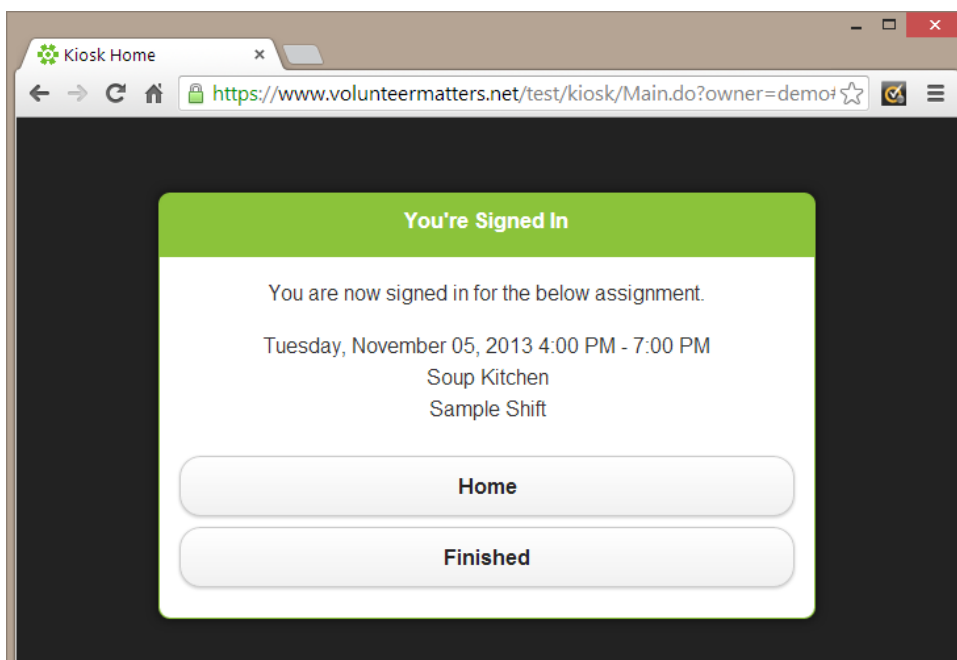
Today's Assignments	
	<b>Sign-In</b> (You are free to sign-in now)
	<b>Too Early</b> (You can't sign in yet - too far from scheduled shift start time)
	<b>Too Late</b> (It is too far past the shift start time for you to sign in)
	<b>Sign-Out</b> (You can now sign out of the shift)
	<b>Sign-Out First</b> (You can't sign into this shift until you've signed out of your current assignment)
Future Opportunities	
	<b>Sign-Up</b> (This shift is available for you to sign-up)
	<b>Wait-list</b> (This shift is full but you may be added to a wait-list)
	<b>Withdraw</b> (You are already signed up for this shift. You can withdraw your assignment if you no longer want the assignment)
	<b>Already Assigned</b> (You are already signed up for this shift. It is within the lock-in period so you cannot self-withdraw via the portal)
	<b>Already Waitlisted</b> (You are already on the wait-list for this shift)
	<ul style="list-style-type: none"> <li>• <b>Locked</b> (Shift is locked by an administrator or within the lock-out period)</li> <li>• <b>Full</b> (Shift is full)</li> <li>• <b>Too Late</b> (Too Late to sign-up)</li> </ul>

## Sign-In

If the volunteer does have an assignment for that day they can log into the kiosk and then will be presented with the opportunity to sign-in for that shift if it is within the time allowed to do so.

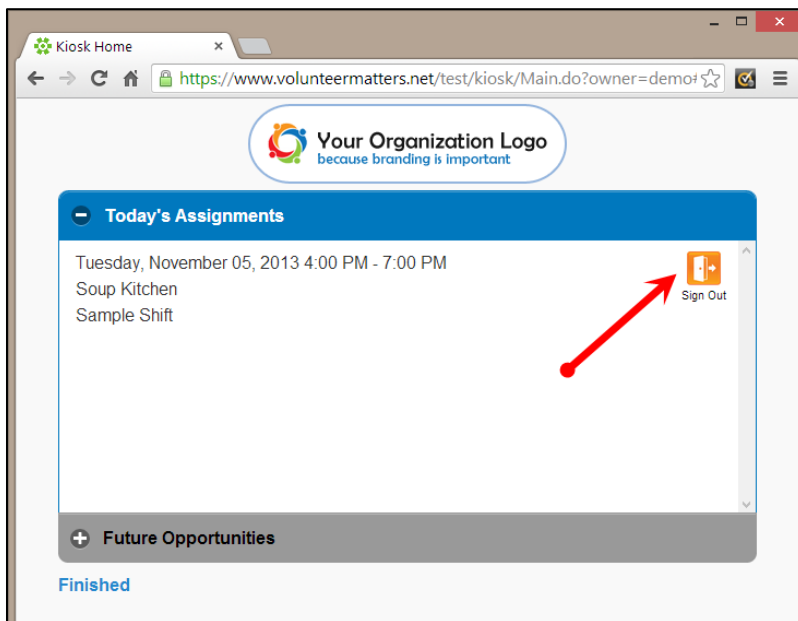


Once they click sign-in they will receive confirmation and they can return to the kiosk main window ("Home") or click "Finished" and sign out of the kiosk.

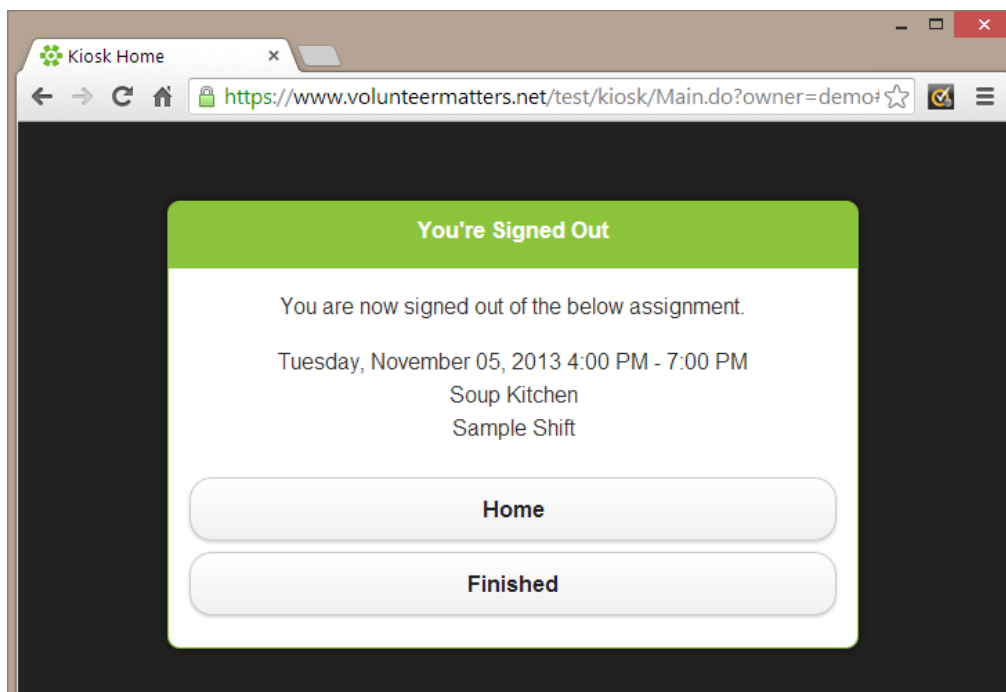


## Sign-Out

If the volunteer is currently signed into an assignment for that day they can log into the kiosk and then will be presented with the opportunity to sign-out for that shift.

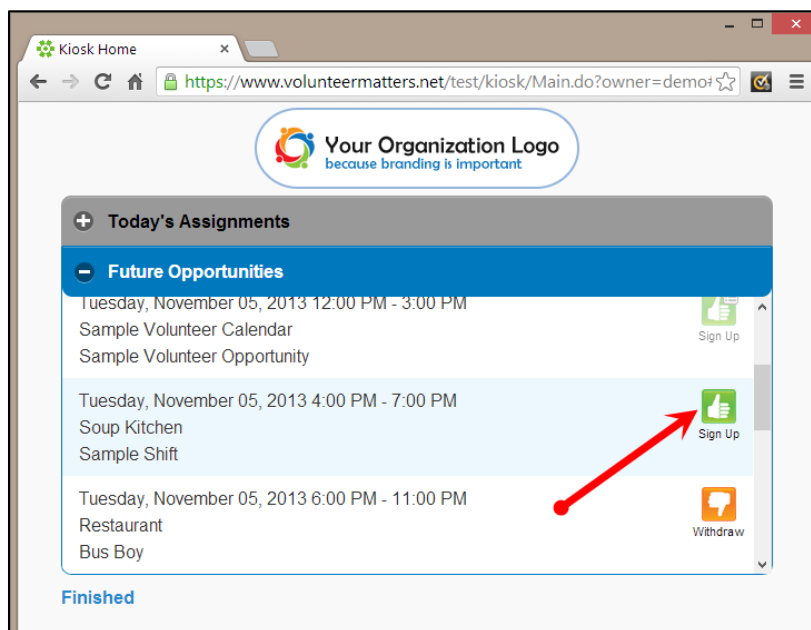


Once they click sign-out they will receive confirmation and they can return to the kiosk main window ("Home") or click "Finished" and sign out of the kiosk.

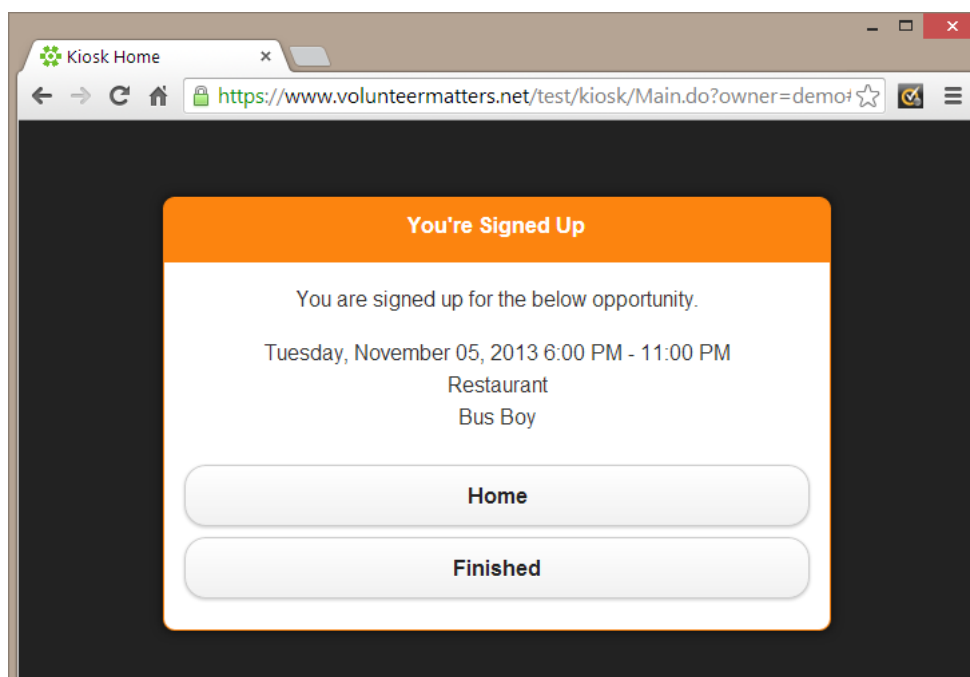


## Sign-Up

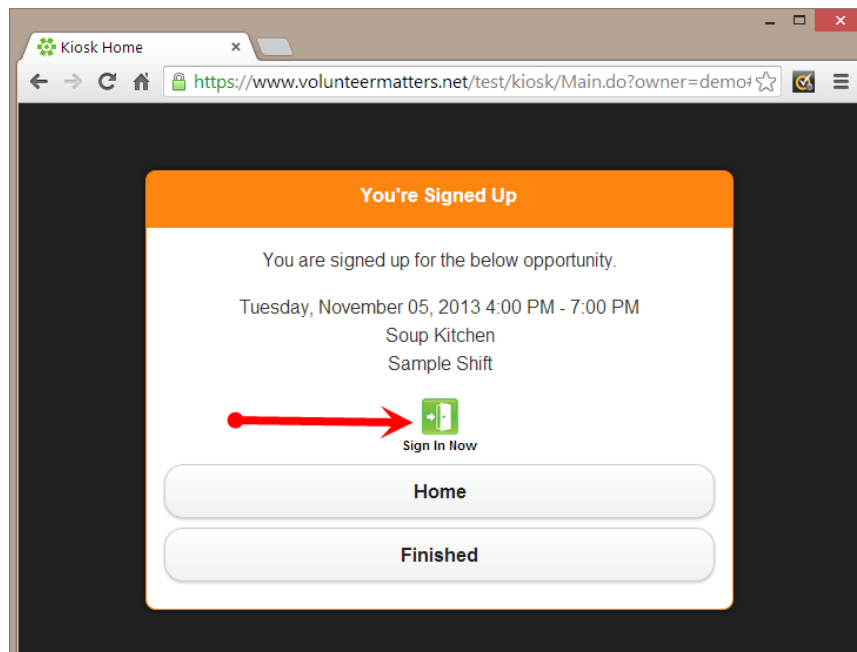
If the volunteer does not have an assignment for that day or if they simply wish to view and sign-up for future shifts, they can log into the kiosk and view shifts available from the “Future Opportunities” area and click “Sign-Up”.



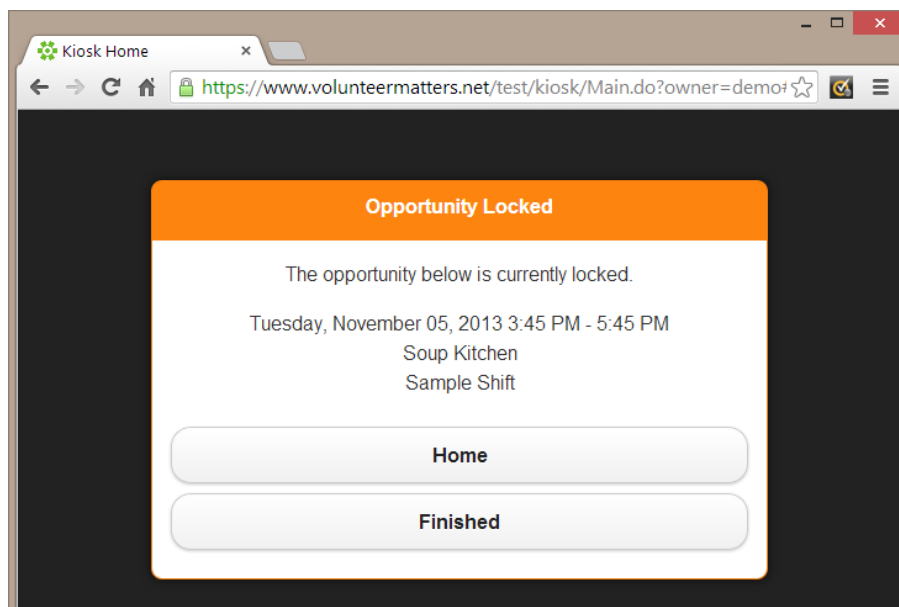
Once they click sign-up they will receive confirmation and they can return to the kiosk main window (“Home”) or click “Finished” and sign out of the kiosk.



However if the shift that they sign-up for is within its sign-in time they will be presented with a confirmation window that also allows them to “Sign-in” or they simply can return to the kiosk main window (“Home”) or click “Finished” and sign out of the kiosk.

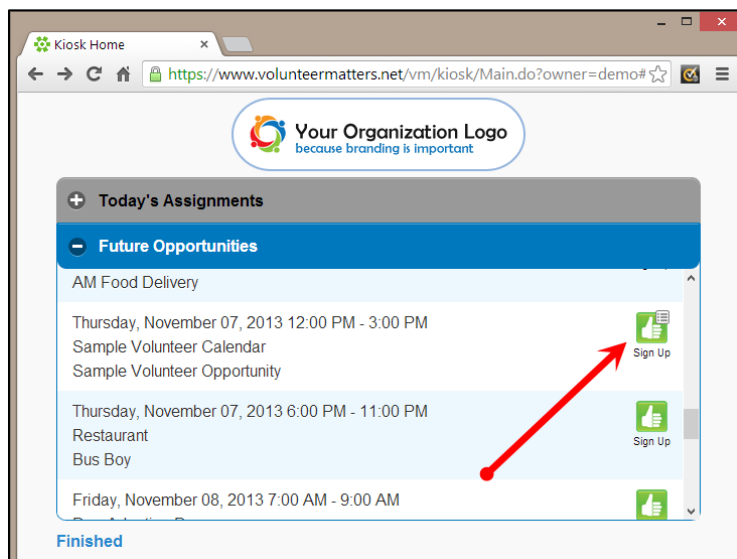


If a volunteer has been reviewing future opportunities for a little while and shift has become no longer available and they click on the “Sign-Up” icon they will be presented with the following “Shift is Locked” confirmation and they can return to the kiosk main window (“Home”) or click “Finished” and sign out of the kiosk. This will be a rare occurrence.

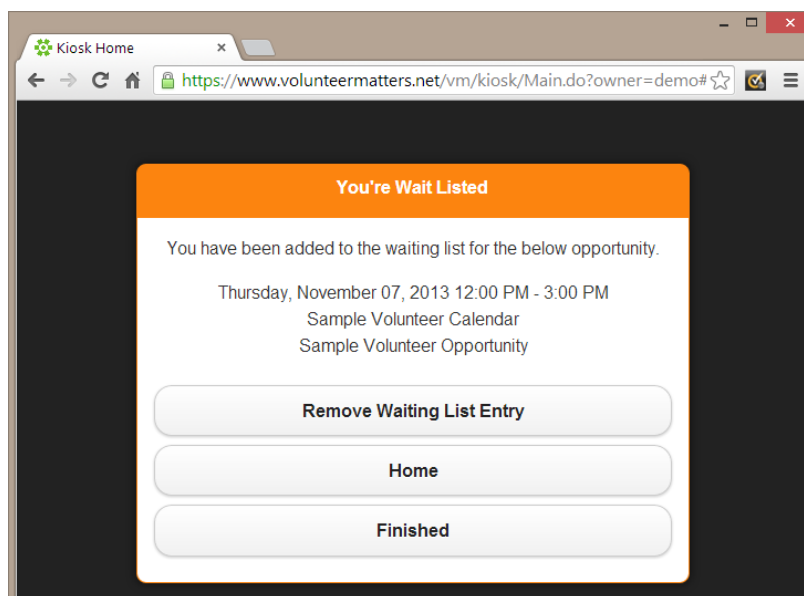


## Wait-list

If the volunteer does not have an assignment for that day or if they simply wish to view and sign-up for future shifts, they can log into the kiosk and view shifts available from the “Future Opportunities” area. If a shift is full and they wish to be added to the “Wait-list” they can click on the “Wait-List” sign-up icon.

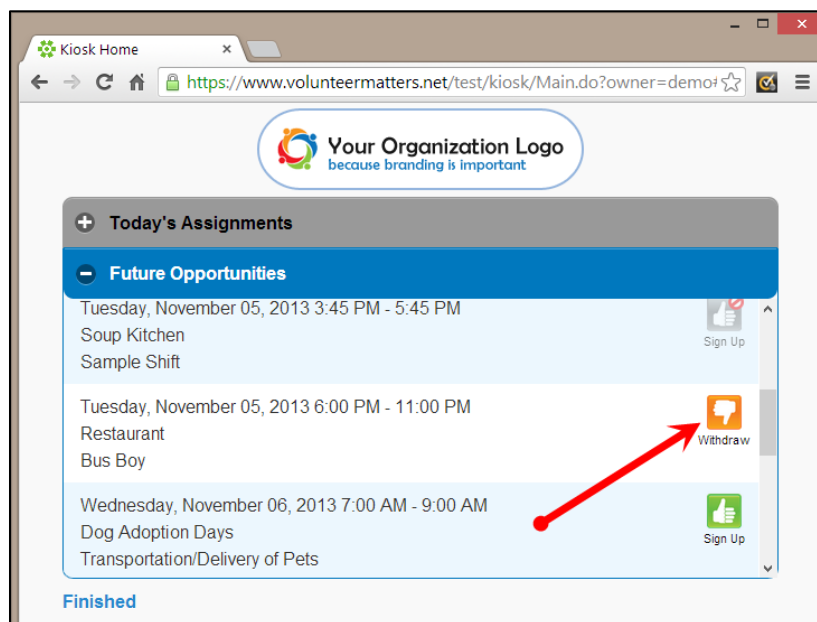


Once they click sign-up they will receive confirmation they have been added to the waitlist and they can remove their wait-list entry, or return to the kiosk main window (“Home”) or click “Finished” and sign out of the kiosk. A user can only remove themselves from a wait-list at this time. After this they must contact an administrator to remove themselves manually.



## Withdraw

If the volunteer is currently signed up for a shift and they wish to withdraw and it is in the allowable withdraw period, they can log into the kiosk, click on the “Future Opportunities” area and scroll down to that shift and withdraw.



Once they click withdraw they will receive confirmation and they can return to the kiosk main window (“Home”) or click “Finished” and sign out of the kiosk.

