UNIT4

In business for people

In Business for You

Workstream Description

Volunteer Management

Nonprofit Model 21.3

2021-11-30

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About this document

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Context

Unit4 has developed the **Nonprofit Model** (NP Model), which is the approach to deliver out of the box capabilities embedded in the software based on best practices for Nonprofit organizations. It is supported by additional database configuration, documentation and an iterative delivery model.

Workstreams

The NP Model consists of several workstreams. For each of these workstreams, documentation is available that describes the supplied capabilities. The following workstreams are available:

- Finance (mandatory)
- Budgeting
- Asset administration
- Procurement
- Sales
- Human Resources
- Payroll
- Travel & Expenses
- Project Cycle Management
- Award Management
- System Administration
- Volunteer Management

The workstreams setup is predefined based on the process scoped for the solution. In the personalization phase, the information specific from the customer is configured. Unit4 ERPx is a highly flexible and agile solution that can easily be adapted to support different system setups and processes.

Intended audience

This documentation's intended audience are the organization's volunteer managers, familiar with all the volunteer department's processes, from data collection to reporting on volunteers. Readers are not required to know all the details; however, some knowledge of basic HR concepts would be advantageous for reading this documentation.

Contents

Volunteer Management

Volunteer management processes encompass all the activities involved in the volunteer lifecycle, from the moment the volunteer registers at your organization, volunteer review, vetting and approval, planning of the volunteer on current activities and missions, throughout his/her service delivery resulting in capturing expense receipts and timesheets.

The described structures and processes are based upon the software capabilities provided with Unit4 ERPx.

The Volunteer management workstream is part of the Additions level of the NP model implementation. For those, there is a reference in the chapter name that identifies it as an Addition.

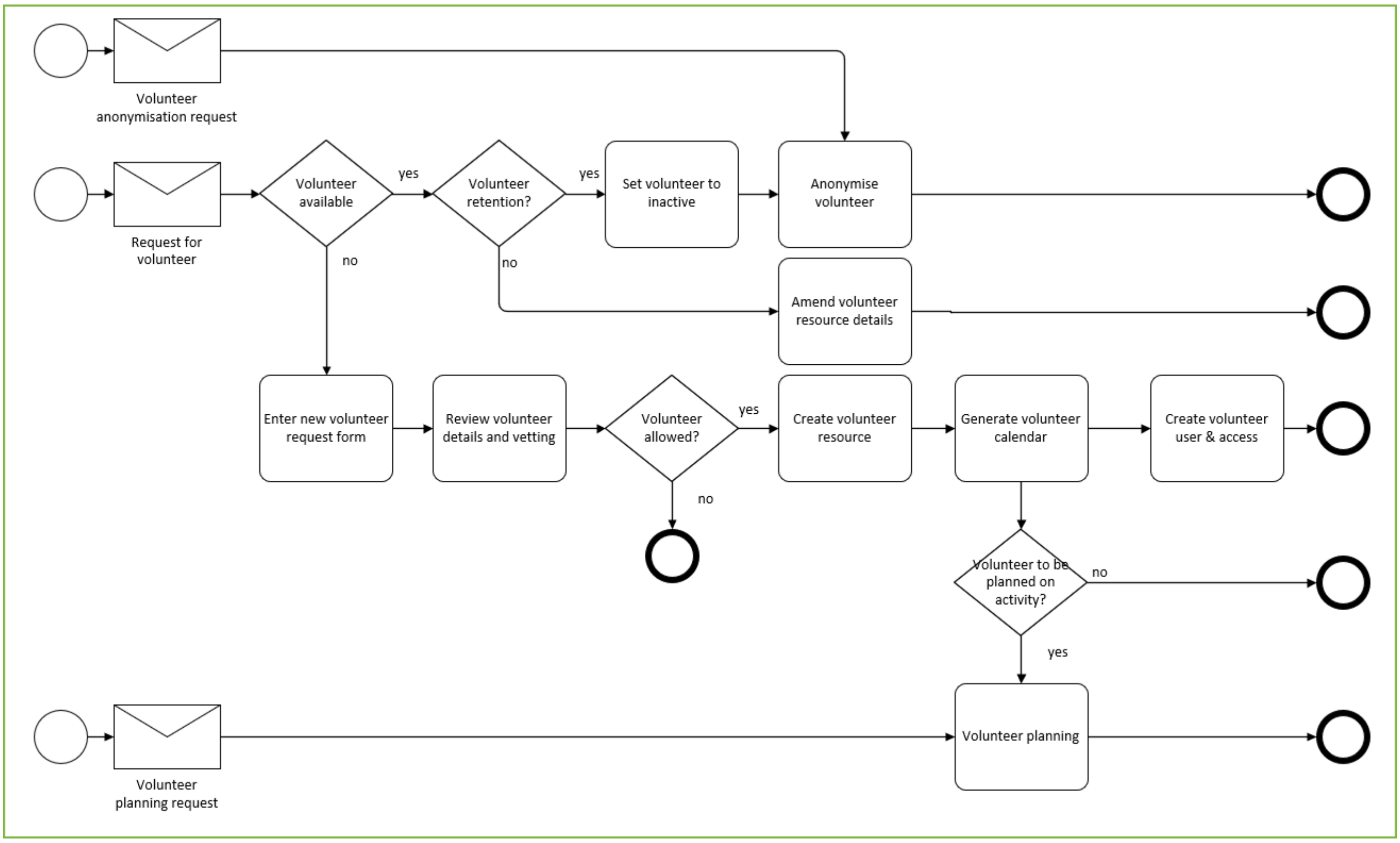

Figure 1 - Volunteer management process

Volunteer registration (addition)

The volunteer registration is the 'heart' of all the volunteer process. It captures all information of the volunteer required to deliver service to the organizations. Obviously, it allows to register name and address details, but additional tabs for capturing payment and bank information, right to work, attach documents, define interests for volunteering, and proof of good conduct are stored.

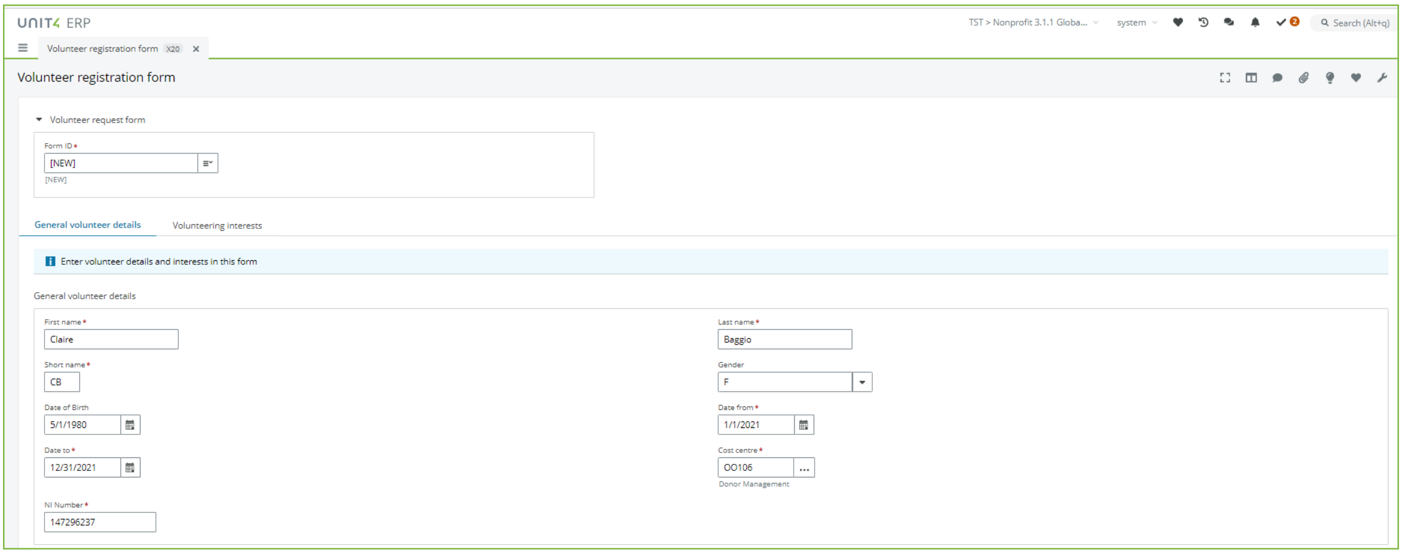

Figure 2 - Volunteer registration; details

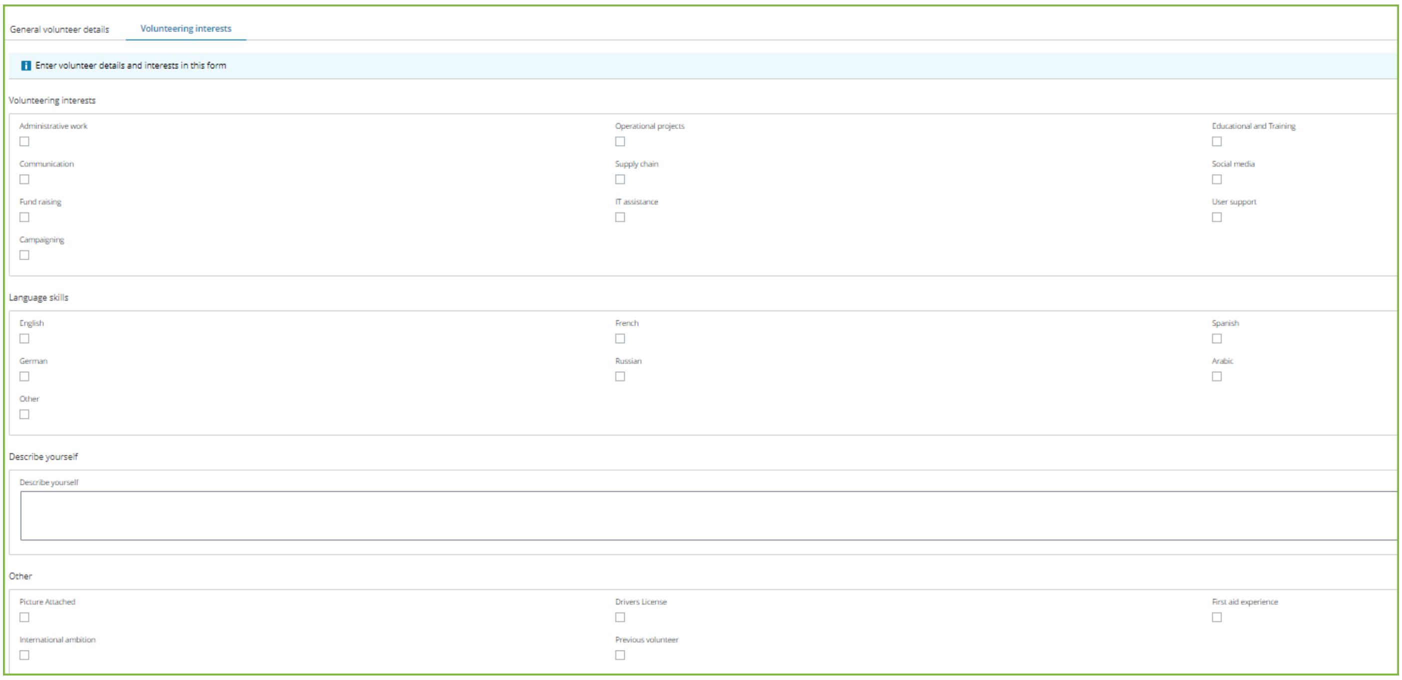

Figure 3 - Volunteer registration; interests

This solution provides adding documents to the volunteer record for vetting and review. The following document types are provided in the solution:

Document type	Description
VM-CERT	Volunteer certificates

Volunteer review (addition)

A review process for new volunteers being registered is provided. It uses a workflow process for approval and review. The first review of all entered data is handled by the HR department. A volunteer integrity check is the second step in the process handled by the same HR department. In a third step, the system will automatically create this new volunteer as a resource type 'Volunteer', and after that, the form is closed for amendment.

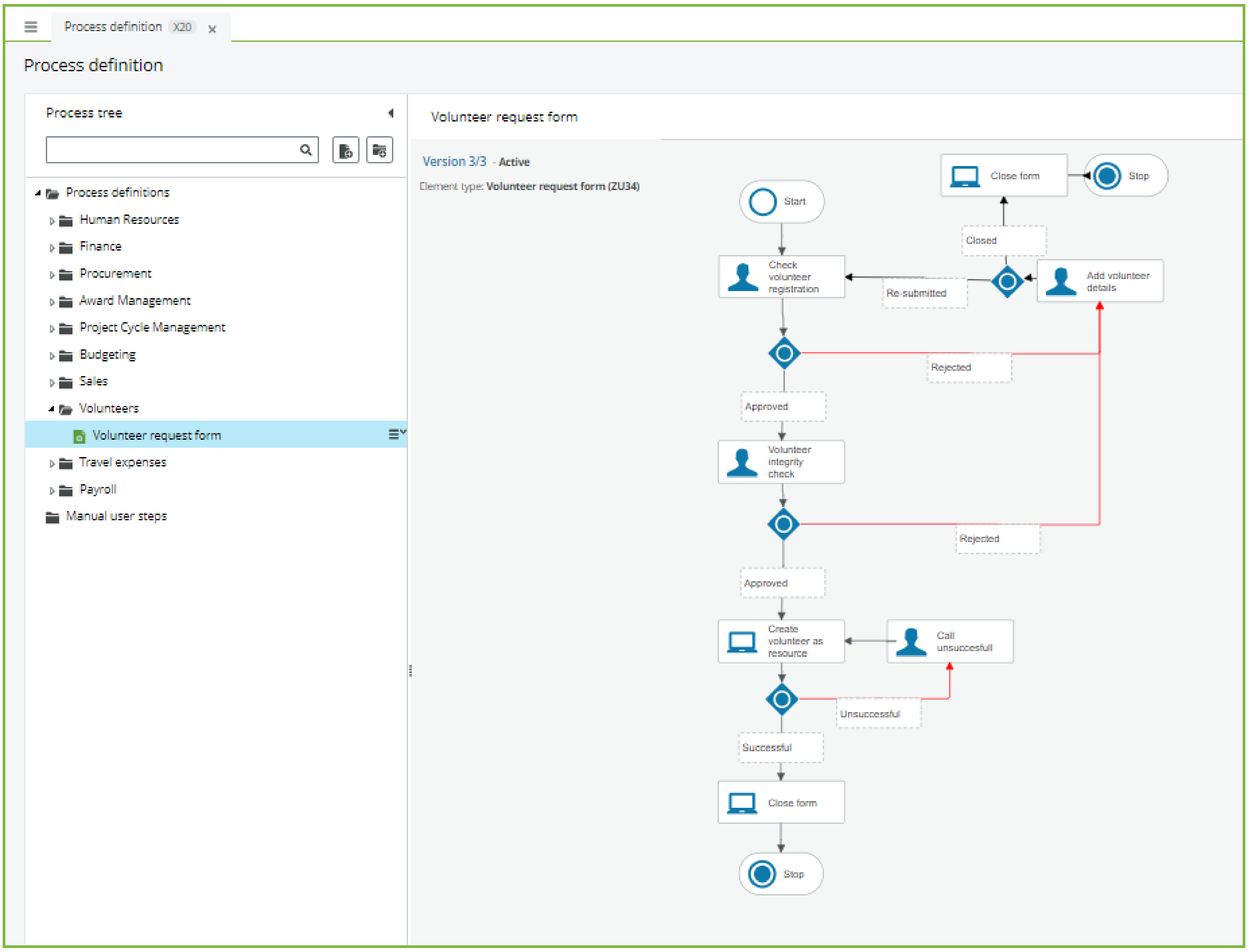

Figure 4 - Volunteer review process

Resource creation (addition)

Volunteers are created as resources of type Volunteer after being reviewed and checked. This assigns them in the resource planning to activities and missions and allows the volunteer to enter their occasional expense receipts and potentially timesheets in the respective mobile apps. A resource of type volunteer is created, including all details stored in the volunteer form.

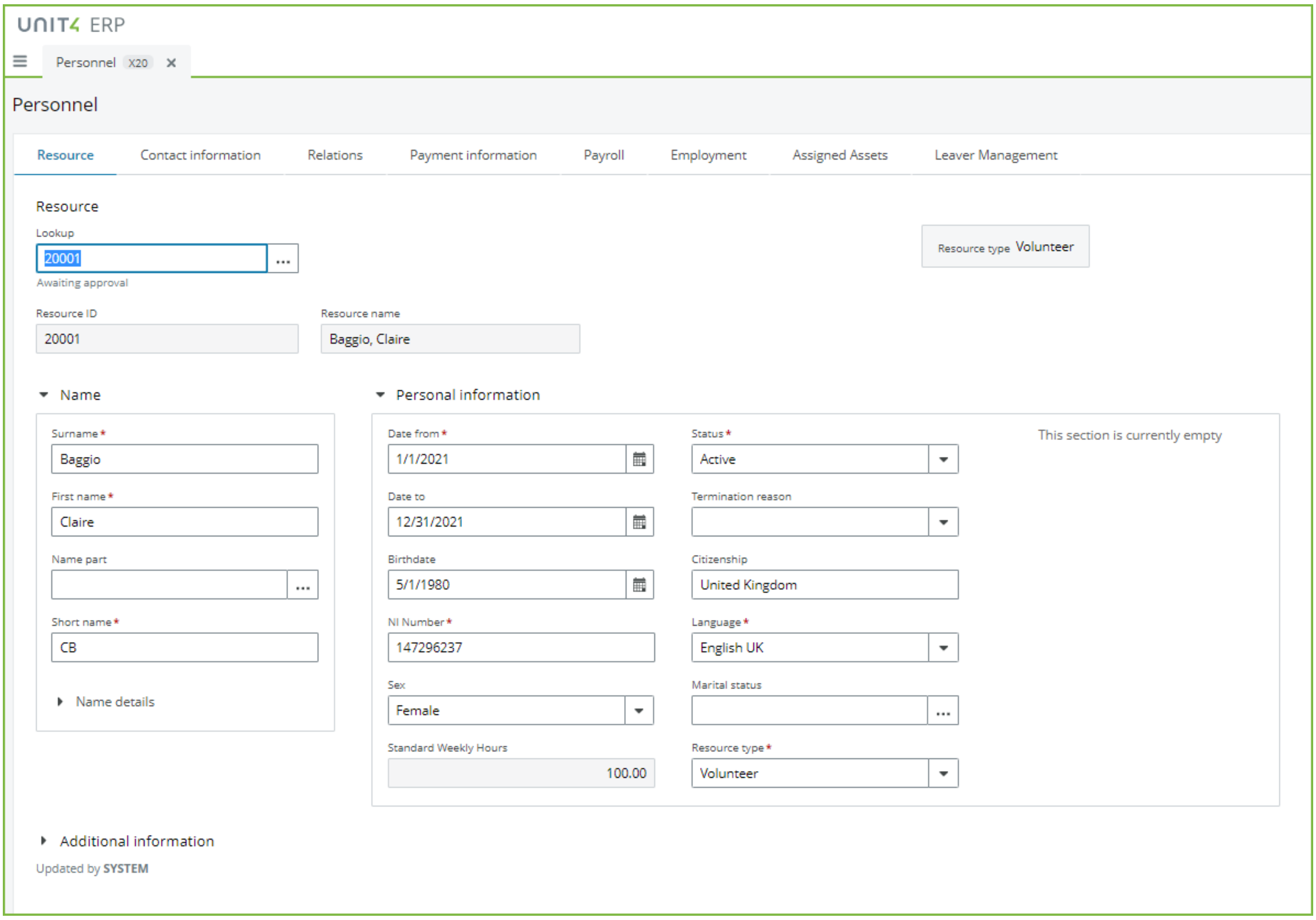

Figure 5 - Volunteer resource creation

Work schedule

To be able to enter timesheets, every volunteer needs a work schedule. Since the volunteer should be able to enter time whenever he is volunteering, a standard work schedule is added, and a full working year calendar is generated based on that. The work schedule is used to create a working calendar. This process can be scheduled to run automatically when a new volunteer is generated.

Work schedule	Description
STD	Standard 40 hours work week

User creation

For the volunteer to enter expenses receipts and/or timesheets, a user must be created, including an access role specifically for the Volunteers and associated credentials.

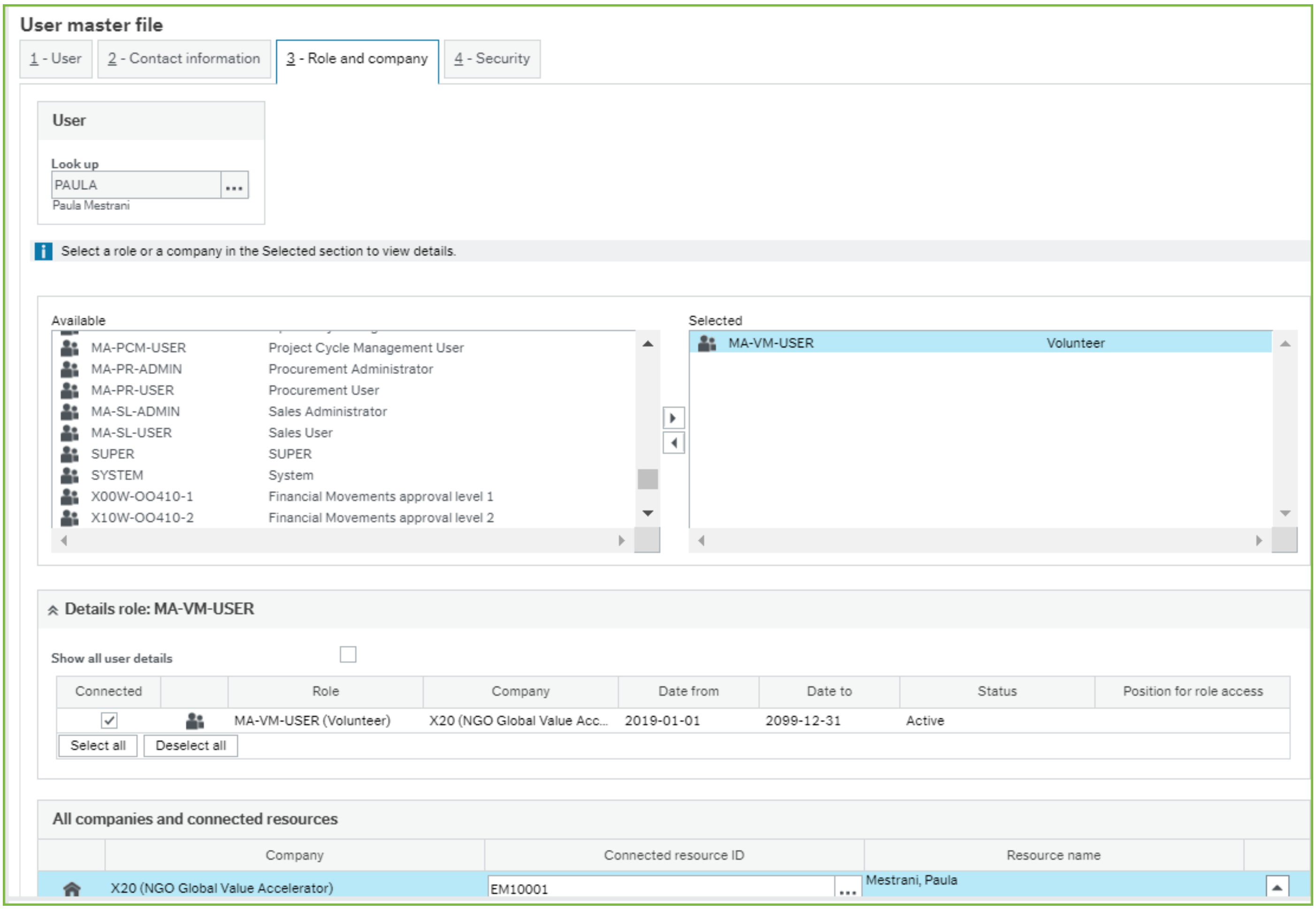

Figure 6 - Volunteer user creation

Role	Description
VOLUNTEER	Volunteer role including access to the mobile timesheet and expense app

Volunteer assignment (addition)

To assign a volunteer to the organization's current activities and projects, the people planning lets users select the volunteer group and find relevant work for them. The planning shows the volunteer pool's availability and lets users assign an existing project and activity to the volunteer, including the number of planned hours. These planned hours are used to populate the timesheet when timesheet registration for volunteers is required.

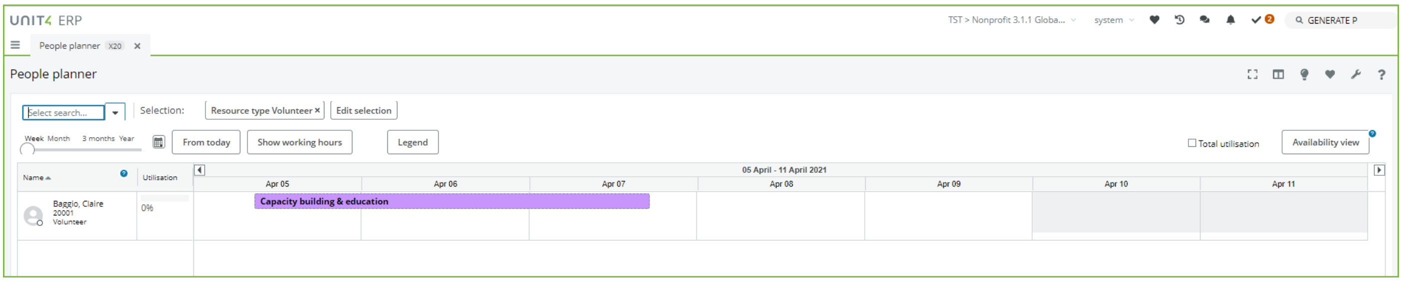

Figure 7 - Volunteer planning and assignments

Volunteer expenses (addition)

The expenses incurred due to travel or any other work activities are entered by the resources in an expense claim and sent for approval to the project manager using a mobile expense app. The app can be used to capture the full expense claims and attach receipts on mobile devices using a camera, including automatic recognition of the receipt's data (expense type, date, currency, amount). The uploaded and recognized receipts are allocated to multiple cost categories, such as cost center, project, and award. The resource ID is automatically populated, and all are posted to the General Ledger when the expense is approved.

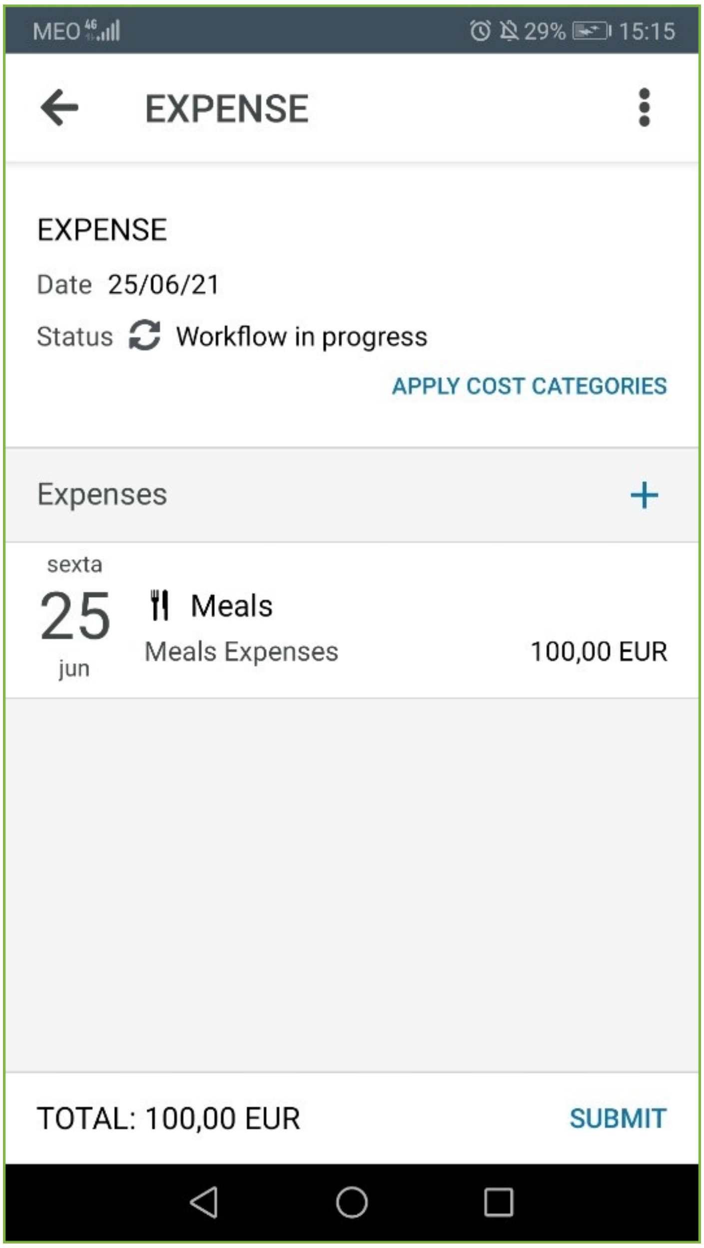

Figure 8 - Mobile expense receipt and claim entry

For more information on this topic, please refer to the Travel & Expenses Workstream Description.

Volunteer time (addition)

Timesheet registration

In the Timesheet registration, approval and time processing process, capturing the time actuals for the volunteer's activities is managed and used for reporting to the donor(s). The solution offers timesheet entry in a dedicated mobile Timesheet app. Time is entered against the project structure, which is called a work task and is a combination of project, workorder (award), and activity.

Time is populated for volunteers that have planned hours coming from the people planning and assignment process. The hours are suggested, and the volunteer only needs to confirm the number of populated hours.

The mobile app allows the user to enter time anywhere at any time, being online or offline. Registration of time is done either using a stopwatch or entering the number of hours per day in the calendar or list view. A limit control is set to prevent volunteers from entering more than 40 hours per week.

The solution provides the volunteer with a mobile timesheet app that works online as well as offline. It uses several timecodes to define the nature of the hours entered. The following time codes are provided:

Time code	Details	Unit
Regular Time	Actual work performed within the resource work schedule	Hours
Overtime	Actual work performed outside the resource work schedule	Hours

Restrict timesheet entry on projects

To limit the number of projects a volunteer is allowed to enter time on, the solution can define whether volunteers are allowed to register hours on a specific project and/or activity. It is not activated by default for every project, but the volunteer manager can easily add the permissions and activate this capability for any project.

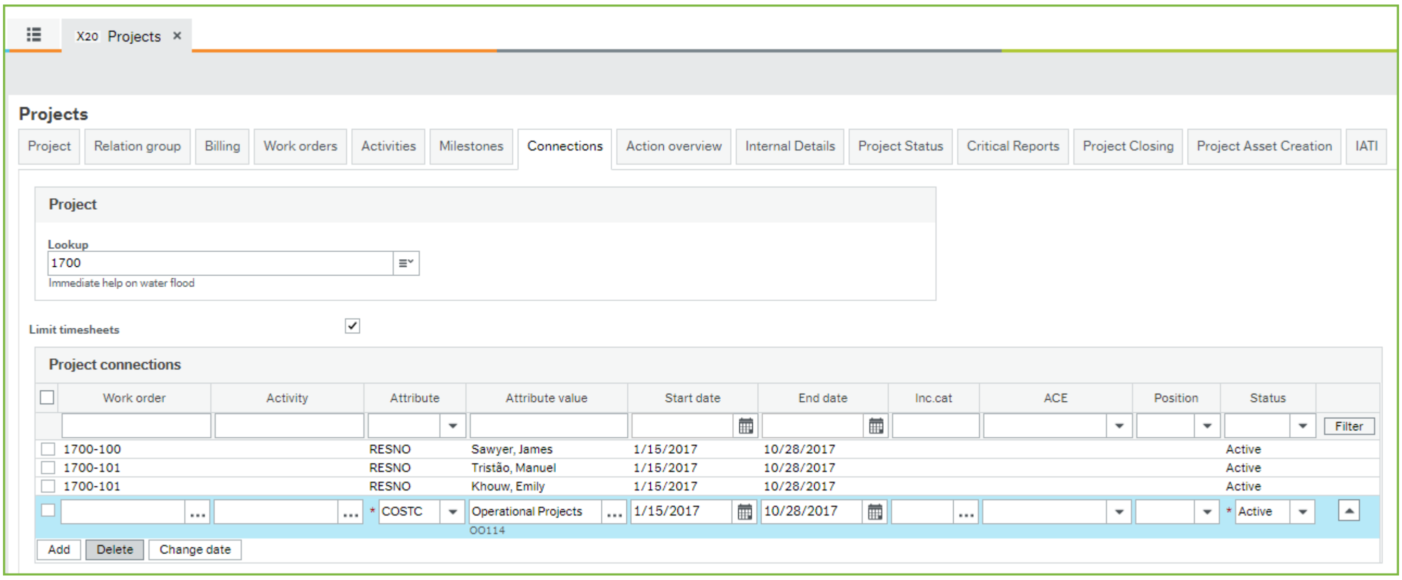

Figure 9 - Project restriction in timesheets

Timesheet approval

The solution provides a workflow approval process for submitted timesheets. A predefined process is available to distribute project-related hours to the project manager. When the timesheet is rejected, it is sent back to the volunteer. The volunteer receives an email alert when a task has been rejected.

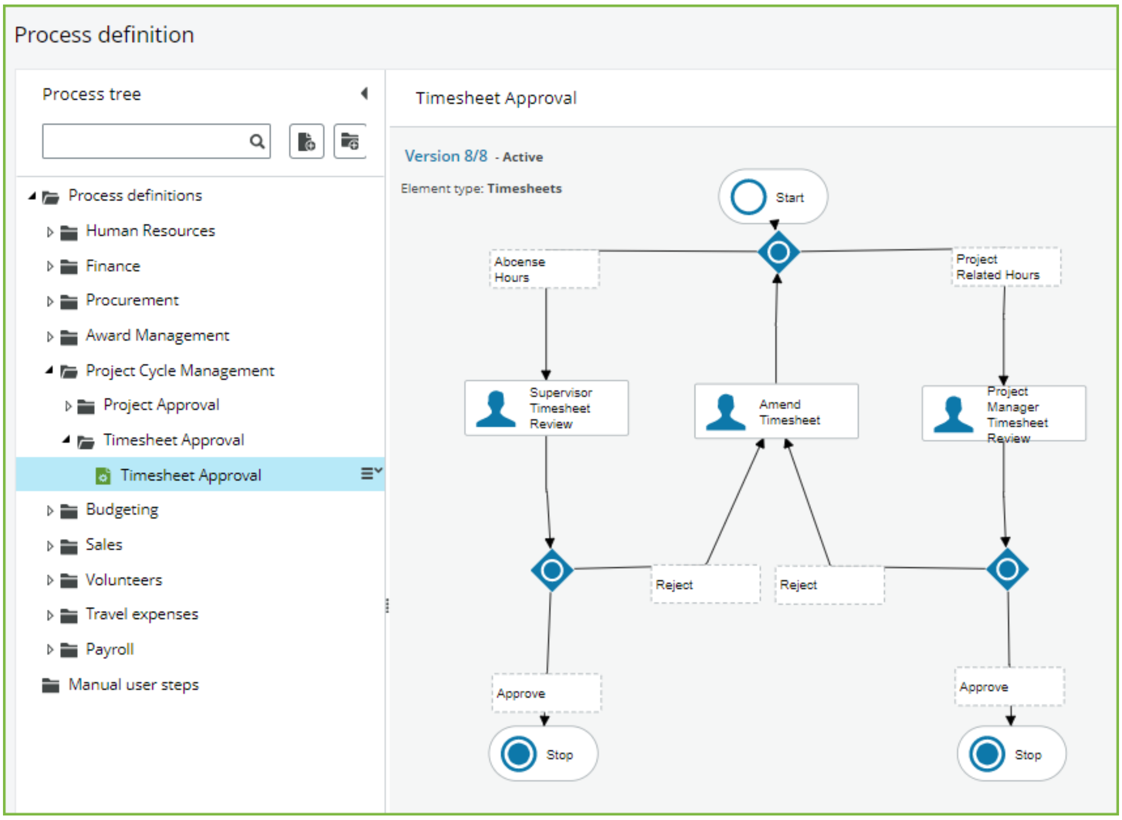

Figure 10 - Timesheet approval process

Time processing, maintenance, and posting

The entered time is processed and posted to the General Ledger using a standard cost rate. The rates are defined as part of data collection during the implementation.

For further information on this topic, please refer to Time processing and Time maintenance in the Project Cycle Management Workstream Description.

Volunteer anonymization

When the volunteer has confirmed not to be active anymore for the organization, the record is closed and not available for transactions anymore.

According to the GDPR (General Data Protection Regulation) in the European Union (EU) personal data must be protected whether the resources get paid or not. It requires personal data to be anonymized due to inactivity or upon request by the individual person.

The solution provides an anonymization process for volunteers that anonymizes the volunteer data and the resource record, including potentially attached documents and structures. This can be based on the inactivity of the volunteer or on individual requests.

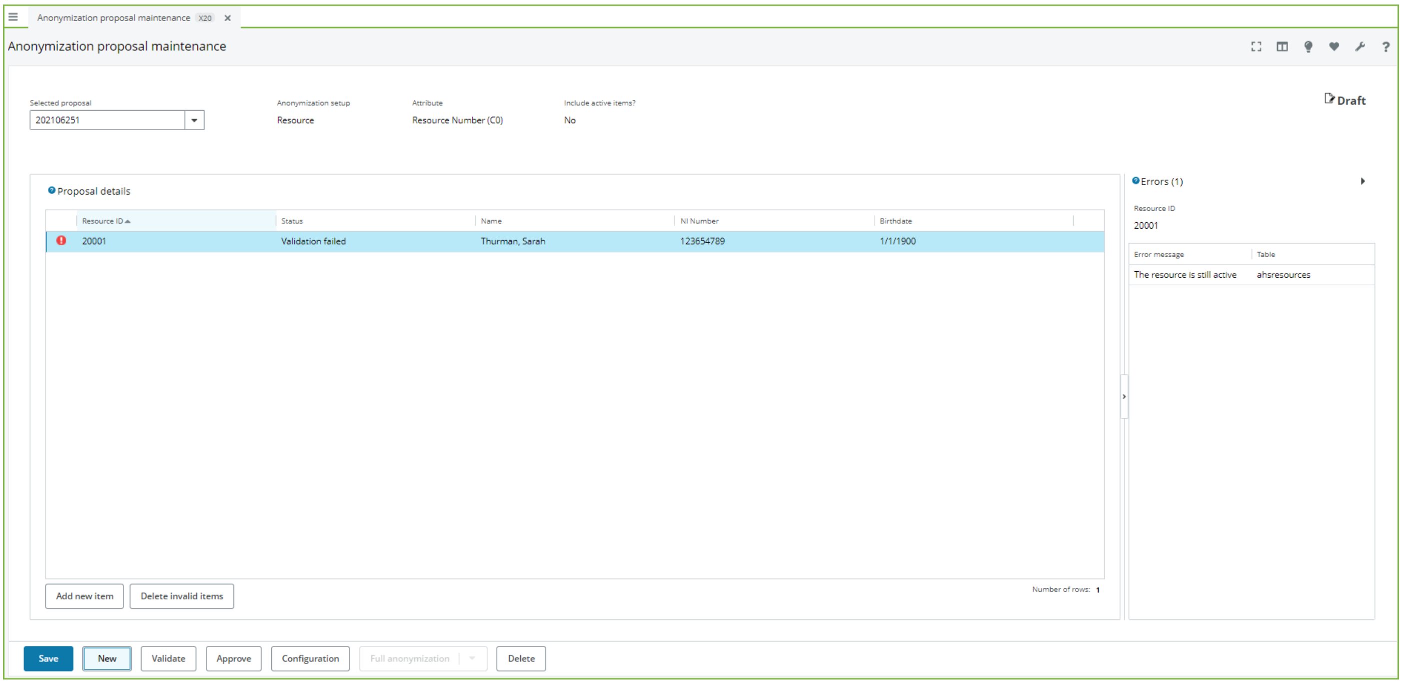

Figure 11 - Volunteer anonymization

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