

Working with Awards

VSys One Webinar – January 2014

Computers understand rules. If you tell VSys what the rules are for a volunteer to be eligible for an award, it can sift through the data to find your candidates.

Award Type definitions:

Before you can ask who is eligible though, you need to set up the rules.¹

From the **Setup Panel**, choose **Awards Types**.

Subjective/manual - These are the simplest types of awards. VSys will not automatically nominate anyone, they must be manually nominated based on your own criteria. Example: "Most Friendly Volunteer".

Hours between two dates - Requires a minimum number of hours between the dates that you specify. Example: 200 hours between January 1-December 31.

Lifetime hours - Requires a minimum number of hours credited in the volunteer's entire history. Example: 500 hours of total service.

Years with hours - A year only counts if, during that year, the volunteer has at least the specified number of hours. Example: With a 50 hour minimum, a volunteer worked - 100 hours in 2009, 35 hours in 2010, and 200 hours in 2011. They would have 2 years of service since 2010 is below the qualifying limit of 50.

Months with hours - An award based on how many months a volunteer was active. Example: A "Six month" award, but only counting months when a volunteer had credited hours.

Years with active months - A year only counts if, during that year, there are at least the specified number of months with volunteer hours. Example: A "Five year" award, but the volunteer must have volunteered during at least 10 months out of each of those years for it to count.

Years since first activity - Counts the years since the volunteer's first credited volunteer hours, and that count must be between the given minimum and maximum. Example: A "Ten year" award looks at the lifetime years that the person has been with your organization.

¹ **Conversion note:** If you had awards in your previous data and we converted it, you will see awards populating the Award Types. These are just the names as they came through you will still need to go in and add the rules to these awards. You DO NOT want to delete these awards and start over using the "copy" feature because deleting them will delete them from any volunteer who has the award.

List/Intellilist - A person is eligible for this award if he is on one or more of the lists you select here.

Example: To receive the “Guild Member of the Year” award, the person must be on the “guild members” list.

Account Records – The awards an award based on the balance in an account record. The amount can be debited to “pay” for the award. Example: Drivers in the Home meal delivery program receive an award for every 500 miles they drive instead of hours volunteered.

If you are looking to use awards rules that are more complicated than the ones defined here, try creating it as an Intellilist where you can add multiple criteria.

Copying award types (new in 2.3 – end of January 2014)

Once you have the first award type created, you can right-click and **Make a copy** of the award type. This way you only have to change the hours/years/requirements as you set up each award.

Working with Awards

To see who is eligible, or who has received an award, use the **Award Manager** in the **User Tools** panel. There are two parts to the manager. One part lets you see who has already received an award, while the other part allows you to use the system to nominate people for awards.

View/Edit Existing Awards

To see who has been nominated for or has received an award, select the **View/edit existing awards** link on the left navigation bar. Use the filters below to select which award(s), when they were nominated or awarded or to filter on specific groups or types.

From the list of people you retrieve, you can right-click and select to edit the status (system created, nominated, awarded) or change/add dates.

Make Automatic Nominations

To see who is eligible for an award, select the **Make automatic nominations** link on the left navigation bar. Select an award type, effective date and which volunteers are eligible, and VSys will search for people who meet the criteria for that award.

From the list of people you retrieve, you can right-click and select to edit the status (system created, nominated, awarded) or change/add dates.

From the Person Editor

In each person’s profile, there is a panel for awards. Awards which have been nominated/awarded through the awards manager will show here. You can also add an award with the **Add award** link along the top bar of the panel.

Bulk Awards Creator

Find this tool on the **User Tools** panel under **Bulk update/create tools**.

Select your Award type and the rules for creating the award. Use the **Edit award** link to fill in the information about the award, dates nominated/awarded and any comments.

Use the filters to select the recipients. Most commonly you will want to use the **Add another filter** link and select a list to use.

Reports and Letters

Reports

From the reports panel select **Awards**. There are two types built-in: an Award Summary (totals) and an Award Detail (who received what awards). Click the **Load settings** link to see report options.

Letters

To send letters, base the **Letter Template** on **Awards** and you will see the same filtering options that you had in reports and the Awards manager.