

## VSys Awards Webinar

### January 2017

It is important to recognize volunteers for their commitment and service. The **Awards manager** is a tool that allows you to make automatic nominations of awards, and manage existing awards in bulk. This webinar will go over how to use the **Awards manager** as well as run reports for the volunteers who are due for an award.

#### Awards manager

- *Setup Award Types*: define the parameters of the different kinds of awards given to volunteers
  - Add a new award definition
    - Description
    - Award basis - Years or hours of service/Intellilists for more complex
      - \*Tip - for hours or years set the first number to your requirement and the second number to the next level minus one.
    - Don't award if the recipient has received any of these
    - Detailed description
    - When nominating awards, give them this status
  - Right-click options
  - If you are coming from a conversion: You will see the names of the awards from the conversion, but they will not be configured. You will need to setup the rules.
- *Make automatic nominations*: make automatic award nominations for volunteers who fit the parameters set in the award types
  - Award types
  - Effective Date - which hours/years count (as of what date)
  - Other filters
  - Right-click options
- *View/edit existing awards*: manage existing awards, change award status and/or dates in bulk
  - Filters
  - Right-click options

- *Update nominations*
  - *To change the status of an Award: **Right-click** in the list of people and select the ones that you want to change. Use the drop-down for the status and dates. (Tip: Awarded allows you to set the nominated date and awarded date.)*

### **Award reports**

- *Summary:* Total number of volunteers receiving each type of award
- *Detailed:* Award information each volunteer is receiving
- *Export to Excel/Grid contents:* Contents to the screen in Excel
- Grid contents

### **Communicating**

- First make sure your letter template is prepared with the type **Awards**.
- From the Awards Manager, **Right-click -> Select All** then **Right click-> Selected Awards -> Send letter**.
- From a Mail Merge, use **the Awards filter** based on **Awarded** or **Nominated** date.

### **Bulk Awards Creator**