

AngelPoints

Release Notes v2016.3.2

This document contains a brief summary of the features of **AngelPoints v2016.3.2**. For more in-depth information on any of the features discussed, please refer to the AngelPoints Help page.

CLIENT PRODUCTION SITES WILL BE UPGRADED

- o January 23, 2017 – no down time scheduled

Support

If you have questions or need assistance in any way, please contact MicroEdge Technical Support.

Support Hours: M-F, 8:00 am – 8:00 pm ET

Phone: 877.704.3343

Email: helpdesk@microedge.com

Online: www.microedge.com

- Check out our guides, videos, walkthroughs, and other assistance for step-by-step instructions and detailed information: <https://www.blackbaud.com/howto/angelpoints>
- To keep up with all the latest news on MicroEdge products, access our knowledgebase, or join in relevant discussions on our forums, go to - <https://community.blackbaud.com/products/microedge>.

Resolved Issues

The following issues are resolved in this release:

- An additional failover mechanism for reminder emails has been implemented
- An issue comes users experienced with volunteer hours being deleted after a reward has been redeemed has been resolved
- Batching processing has been optimized to improve system efficiency
- The geo-location service used for suggesting volunteer events and mapping CRA events has been updated to utilize Microsoft Bing's geolocation solution, resolving intermittent connectivity issues.
- An issue with newly created recurring events not appearing on the events calendar unless re-saved, related to the geolocation issue above, has been resolved
- Ongoing IRS and CRA updates to NPO profiles in the system
- Inconsistent display issues with Firefox version 50+

Case Number	Module / Application	Description
364507	Giving/Donations	Resolved issue where recurring credit card donations were not being processed. (Patch 2016.3.1)
365965	Volunteer	Resolved issue where volunteer using Redeem Awards had the volunteer hours deleted from the system.
-	Events	Resolved issue where the survey page was not advancing in the web browser Firefox.

AngelPoints

Volunteer Event Beta Release – 2017.0.1

This document contains a brief summary of the features of **AngelPoints Volunteer Events Beta Release 2017.0.1**. For more in-depth information refer to the [AngelPoints Help page](#).

- DOWNTIME: Monday, January 30th from 8:00 am through 6:00 pm (ET).

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How-to Documentation

Have questions or need to quickly get up to speed? Check out the help files, guides, videos, walkthroughs, and other assistance: <https://www.blackbaud.com/howto/angelpoints>

The MicroEdge Community Resources Site

To keep up with all the latest news on MicroEdge products and join in relevant discussions on our forums, visit our community page: <https://community.blackbaud.com/products/microedge>

Managers

With our 2017.0.1 release we are excited to launch the beta version of our re-imagined volunteer event participation experience for one-time and recurring events.

Due out in mid-May 2017, the redesigned event participation includes:

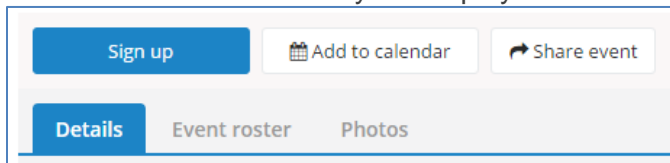
- Enhanced look and feel, designed to drive increased participation with an intuitive and efficient sign-up experience
- Updated pre- and post-event surveys aesthetics to encourage higher completion rates
 - **NOTE:** *The Events Discussion Board is retiring after this release.*
- Added new options for managing and sharing event photos so you can create a more engaging experience
 - **NOTE:** *Photos are no longer added in the event details description area; this may impact events that you've already created.*
- Added opportunities for participants to share their great work on social media via the VolunteerMe mobile app

While in beta, we actively seek your feedback on the work done so far and encourage you to provide input on what's to come. Please join in the [discussion on our Communities site](#) to learn more about the volunteer events redesign, offer your feedback, and sign up for a guided review.

Your input is a critical part of our success in creating a first-class volunteering experience for your users. We hope to hear from you.

Volunteers – Sign up for Events

We have improved our interface to allow your volunteers greater ease to sign up for events. The new interface is similar to the dashboard your employees view when they first log into AngelPoints.



A typical event has three buttons across the top of the page:

- **Sign-up:** Automatically adds the employee's name to the event roster and volunteers them for that event
 - Select ***I cannot attend*** button – they are removed from the event
- **Add to calendar:** Opens a pop-up window to connect with your office calendar and allow you to add the event
- **Share event:** *Coming soon to the VolunteerMe mobile app (April 2017)*

The secondary toolbar allows the user to view the event:

- **Details:** Includes an event description and other details you wish your employees to see
- **Event Roster:** Displays who else is participating in the event
- **Photos:** Displays and allows participates to add photos from the event. *(Optional)*

Also, depending on the type of event, your volunteers may be asked to do one or more of the following:

- Select a shift
- Join/Leave a wait list
- Answer a pre-screening questionnaire

- Add friends and family
- Answer a survey

Sample Events

Try out the new interface by creating some events and then volunteering for them.

Sample Event 1 – Pre-screening & Shifts

- 1) **Title:** Reading Club - Volunteer Readers
- 2) **Description:** The reading clubs consist of three basic phases: an introduction period, a read-aloud session with the teacher-selected book, and a craft and activity period. During introductions, many volunteers will converse with the children about favorite books, career paths, upcoming holidays, and vocabulary words that will appear during the reading. This is a good chance for the volunteers to learn the children's names and develop a rapport with them. Each session last for 2 hours.
- 3) **Event/Activities Shifts:** Set up your shift title – Shift 1, 9am-11am, select the Save & Create Another button – change the shift title to Shift 2 and adjust the time to 11am-1pm, repeat until 4 shifts have been created.
 - **Required:** This box is automatically selected for you and requires your volunteers to select a shift time. Unchecking this box means that volunteers do not need to select an activity/shift in order to volunteer at this event.
- 4) **Event Date/Time:** Single Event, From – February 4, 9am until 5pm
- 5) **Event Location:** Use your work address
- 6) **Event Details:** Maximum Volunteers – 8, Pre-Screening – check this box and add this note: *I verify that I am over 18 years of age.*
- 7) **Automatic Logging of Hours for Users:** Select the bullet in front of “*Use Event or Activity/Shift Duration*”
- 8) **Publish** event.

- 9) View as Volunteer: Select the **Sign up** button – the new volunteer event page looks similar to the dashboard - the new **photos** tab is visible.

Reading Club - Volunteer Readers

You have successfully signed up for this event. Your hours will be logged automatically after the event.

Event Details | Event Roster | Event Discussion

Collapse Event Description

The reading clubs consist of three basic phases: an introduction period, a read-aloud session with the teacher-selected book, and a craft and activity period. During introductions, many volunteers will converse with the children about favorite books, career paths, upcoming holidays, and vocabulary words that will appear during the reading. This is a good chance for the volunteers to learn the children's names and develop a rapport with them. Each session last for 2 hours.

Participation Details
Signed-up on Thursday, Jan 12, 2017 03:19:33 pm EST (GMT-0500)

Activities/Shifts
You are currently signed up for the following Activities/Shifts:
Shift 2 (10:00am - 11:00am) [Detail](#)
[Change your Activities/Shifts](#)

You're signed up!

- Add Friends & Family
This event is not open to friends and family
- Remove
- Driving Directions
- Weather

I cannot attend | Edit activities/shifts | Add to calendar | Share event

You have successfully signed up for this event. Your hours will be logged automatically after the event.

Details | Event roster | **Photos**

Date & location		Description
Feb 4, 2017 9:00 AM - 5:00 PM Weather	7900 West 78th Street Edina, MN, 55439 USA Location	The reading clubs consists of three basic phases: an introduction period, a read-aloud session with the teacher-selected book, and a craft and activity period. During introductions, many volunteers will converse with the children about favorite books, career paths, upcoming holidays, and vocabulary words that will appear during the reading. This is a good chance for the volunteers to learn the children's names and develop a rapport with them. Each session last for 2 hour.

- 10) The Pre-screening requirement is now a pop-up that needs to be acknowledged by your volunteers in order for them to sign up for the event.

Pre-screening acknowledgement ✕

I acknowledge that I have read the requirements. By checking the checkbox, I am agreeing that I meet the below requirements:

I verify that I am over 18 years of age.

- 11) View the **Event roster** to see the new display that includes the shifts and the number of spaces available for each.

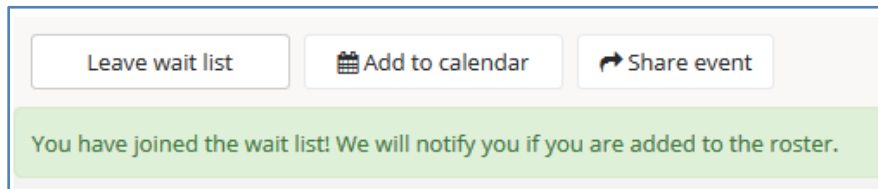
The screenshot shows the 'Event Roster' tab selected. At the top, there are three tabs: 'Event Details', 'Event Roster', and 'Event Discussion'. Below the tabs is a navigation bar with 'Details', 'Event roster', and 'Photos'. The main content area shows '2 participants' and '10 out of 12 spaces available'. Below this, there is a summary of shift availability: 'shift 1 (4 out of 4 spaces available) | shift 2 (2 out of 4 spaces available) | shift 3 (3 out of 4 spaces available) | shift 4 (4 out of 4 spaces available) | shift 5 (4 out of 4 spaces available) | shift 6 (4 out of 4 spaces available)'. A table lists the participants:

Name	Email	Activities/shifts
Single, J		shift 2, shift 3
Single, Admin		shift 2

Sample Event 2 – Employee Wait List

- 1) **Title:** Food Shelf Package Donations Day
- 2) **Description:** Your local food shelf is having a day to help package and distribute food. Volunteers repackaging bulk foods such as pasta, cereal, potato, rice into family size packages, sort food from food drives and donations, or label canned goods. These items go to our nearly 1,000 partner agencies, including food shelves and feeding programs that serve our hungry neighbors. This position requires that you are able to stand for several hours.
- 3) **Event/Activities Shifts:** no shifts needed – single event
- 4) **Event Date/Time:** Single Event, From – February 19, 10am – 2pm
- 5) **Event Location:** Use your work address
- 6) **Event Details:** Maximum Volunteers = 2; Wait List – check this box, the option to, 'Automatically Add Participants From The Wait List' appears, check this box.
- 1) **Automatic Logging of Hours for Users:** Select the bullet in front of "Use Event or Activity/Shift Duration"
- 2) **Manger Email Notifications:** Check both the boxes to be notified of "Participant Removed" and "Participant Added From Wait List"
- 3) **Publish** event
- 4) Select the **Event Roster** tab, select the **Add Participants** button and add any 2 participants but not yourself

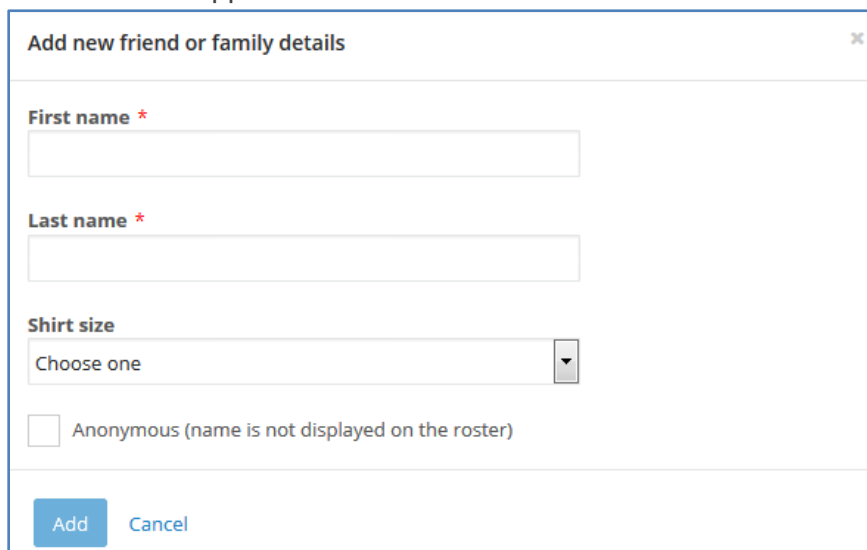
- 5) View as Volunteer – select the **Join wait list** button. A notification appears saying, “You have joined the wait list! We will notify you if you are added to the roster.”



A screenshot of a user interface showing three buttons: "Leave wait list", "Add to calendar" (with a calendar icon), and "Share event" (with a share icon). Below the buttons is a green notification box with the text: "You have joined the wait list! We will notify you if you are added to the roster."

Sample Event 3 – Friends & Family (no shifts)

- 1) **Title:** Habitat for Humanity Building Day
- 2) **Description:** Build and rehabilitate decent, affordable homes in the seven-county metro area in partnership with hard-working, low-income families
- 3) **Event/Activities Shifts:** no shifts needed – single event
- 4) **Event Date/Time:** Single Event, From – March 1, 9am – 5pm
- 5) **Event Location:** Use your work address
- 6) **Event Details:** Maximum Volunteers – check the box in front of “Unlimited”; Allow Friends & Family – check this box.
- 7) **Automatic Logging of Hours for Users:** Select
- 8) **Publish** event
- 9) View as Volunteer – Select the **Sign up** button. The button **+Add friends & family** appears
- 10) Select the button **+Add friends & family**
- 11) The Add friends and family pop-up opens and displays any existing friends and family
- 12) To add a new friend and family, select the **+Add friends & family** button. The Add new friend or family details screen appears. Add their information.



A screenshot of a form titled "Add new friend or family details" with a close button (x) in the top right corner. The form contains the following fields:

- First name *** (text input field)
- Last name *** (text input field)
- Shirt size** (dropdown menu with "Choose one" selected)
- Anonymous (name is not displayed on the roster)

At the bottom of the form are two buttons: "Add" (in a blue box) and "Cancel".

13) Click **Add**, and their name appears on the event dashboard.

Friends & family				
	Name	Shirt size	Anonymous?	Status
⋮	Prince, Diana	Large	No	

Sample Event 4 – Logging hours after an event

Note: In order to see how logging hours has changed, an event date/time needs to have passed.

- 1) Select **Manage > Manage Events**
- 2) Find the first event created: “Reading Club - Volunteer Readers”
- 3) Select the pencil icon to edit the event
- 4) Change the date to yesterday’s date
- 5) Select the **Save** button
- 6) Select **OK** on the pop-up to confirm the type of hours
- 7) Select **View as Volunteer**
- 8) The Log hours screen appears, allowing users to more easily add their hours after an event

Log hours

My hours

NOTE: *If you turned on the automatic tracking of hours for an event, that number appears in the Log hours screen, and it can be edited.*

Photo Gallery

Photos included on events are configurable. If you wish to have this setting turned OFF for your organization, please contact Services.

Note: If no photos are added to an event, the Photo tab does not appear for your employees.

To add a photo to an event:

1. Select the **Manage** tab > **Manage Events**
2. Find the event to update
3. Select the photo icon in the *Actions* menu on the right hand side
4. The **Photo management** page opens - this is similar to the photo carousel from the dashboard
5. Select **+ Add photos**
6. The **File manager** pop-up opens
7. Select **+ Add files** to add new images
8. The Add Files pop-up opens
9. Drag a file or click to browse for the image on your computer
 - a. **NOTE:** You can select photos already in the **File Manager**
10. Once the image has been selected, you can see the photo and are prompted to add a Caption
11. Select the **Add** button
12. The **File manager** pop-up is open, and you can now see the photo you added
13. The photos you uploaded are automatically selected
 - a. To add other photos from the File manager, select the box in the upper right-hand corner of the image; a check appears
14. Select the **Add** button
15. The photos are viewable in the Photo management tab
 - a. **NOTE:** The first photo to be uploaded, automatically has a little orange badge that says 'Mobile/social' on its photo card
16. Select the ellipsis button to make changes to the photo:
 - Edit** – Change the caption on the image
 - Remove from gallery** – Remove the image from that event's photo gallery; however, the image remains in the **File manger**
 - Mobile/social cover photo** – Select a photo for the cover