



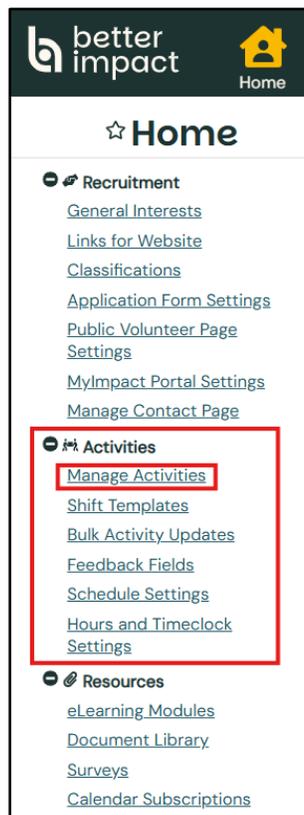
Better Impact Volunteer Activity Training Guide

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Creating a Volunteer Activity

The steps below describe how to create a volunteer activity in Better Impact, allowing volunteers to select or sign up for specific types of activities. For more information, see Better Impact's [Comprehensive Guide to Activities](#) and the other materials available in Better Impact's documentation.

1. Log in to your administrator Better Impact account.
2. Click the "Configuration" button on the top navigation bar.



3. Click "Manage Activities" on the left-hand menu, underneath the "Activities" category
4. Click "New Activity" under the activities window. Optionally, you could also click "New Category" if you would like to create specific types of activities that fall under different types of programs.

Activities	Dates	Type
Uncategorized		
Corrections	8/13/2024 - 8/14/2026	Scheduled
General Volunteer	8/5/2024 - 8/14/2026	Scheduled
Recovery Coach	8/13/2024 - 8/14/2026	Scheduled
TRS Caller	8/13/2024 - 8/14/2026	Scheduled

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5. The “Create New Activity” window includes all of the details for the activity. There are many options, but some of the primary fields include:
- **Activity (Required):** This is the name of the activity that will be shown in Better Impact
 - **Category:** The category the activity is assigned to (this can be left blank)
 - **Active:** Whether the activity is active for recording hours
 - **Allow Hours Logging:** Whether the activity appears available to volunteers for logging

Create New Activity

Basic Info | Schedule | Visibility and Automation | Qualifications | Feedback Fields | Classifications | Notifications

Activity:

Category:

Activity Report Group:

Application Form: Default Application Form

Active: This activity is active

Allow Hours Logging: Volunteers are allowed to log hours for this activity

Auto Log Hours: Auto log hours for this activity.

Backup List: Allow volunteers to add themselves to the backup list

Description – pre-assigned:

Please make sure to visit all of the tabs and fill in the required fields before saving.

Cancel Next Save

6. Once the “Basic Info” has been recorded, click “Next” in the bottom right corner to go to the next page.
7. The “Schedule” page provides different options for how a volunteer activity can be scheduled or not scheduled. The most basic way to set up a volunteer activity is by clicking “No Schedule,” which means that the activity can be completed multiple times, at any time. Many of the activity options can be edited after the activity is created, but a schedule cannot be edited once the activity is saved and first created. See the Appendix of this document to see other scheduling options.

Create New Activity

Basic Info | **Schedule** | Visibility and Automation | Qualifications | Feedback Fields | Classifications | Notifications

Recurring Pattern | Disjointed | One Time | Seasonal | **No Schedule**

Cancel Next Save

8. The final section with fields that are required is the “Visibility and Automation” section. The two required fields are:

- **Minimum Volunteers:** The minimum number of volunteers that must be signed up for an activity to be entered
- **Maximum Volunteers:** The maximum number of volunteers that can be logged on an activity at once

The defaults are set at 1 (Minimum) and 0 (Maximum). The “Maximum Volunteers” must be adjusted upwards in order to be able to save the activity.

Create New Activity
✕

Basic Info
Schedule
Visibility and Automation
Qualifications
Feedback Fields
Classifications
Notifications

Visible to

Only volunteers who are signed up, assigned or on the backup list

Visible to all volunteers who are...

Applicant If Qualified

In Process If Qualified

Accepted If Qualified

Inactive If Qualified

When "If Qualified" is selected, you should choose at least one Qualification on the next tab. If no qualifications are selected only the Status will be used to determine which volunteers will be able to see this activity.

Public

Self-Scheduling *Automatically assign these volunteers when they sign up

Applicant If Qualified

In Process If Qualified

Accepted If Qualified

Inactive If Qualified

When "If Qualified" is selected, you should choose at least one Qualification on the next tab. If no qualifications are selected only the Status will be used to determine which volunteers will be able to see this activity.

Auto Lock ⓘ

On the maximum number of volunteers signed up but not assigned

On the maximum number of volunteers assigned

Minimum Volunteers ⓘ *Does not affect the auto lock

Maximum Volunteers ⓘ *Auto locks at this number

Allow volunteers to remove themselves from a confirmed assignment

Cancel
Next
Save

9. The rest of the tabs (Qualifications, Feedback Fields, Classifications, and Notifications) have additional options which are not required to save an activity. This guide does not describe them, but if you would like to learn more or utilize them, please reach out to the Public Science Collaborative, or read [Better Impact's Comprehensive Guide to Activities](#) to learn more.

10. Click “Save” in the lower right-hand corner to save the activity and allow users or volunteers to create volunteer entries for the activity.

Appendix: Scheduling

When setting up a Better Impact volunteer activity, a user must choose a schedule for the activity. When a volunteer signs up or is assigned to a specific activity that has a schedule, the volunteer activity appears in the volunteer’s calendar on their Better Impact profile page.

The schedule options are listed below, followed by sections for each describing the schedule types.

- Recurring Pattern
- Disjointed
- One Time
- Seasonal
- No Schedule

Recurring Pattern

Using the “Recurring Pattern” schedule, administrators can set an activity to be scheduled for a specific time on a specific day (or days) of the week and repeat on the schedule set by the Better Impact user. The scheduling pattern could be set for every week, every other week, every month, or other options. This activity pattern will continue until the end date set in the “Pattern Range” section.

A recurring pattern schedule is best for activities that happen regularly at the same time every week or month. This might include a weekly meeting or event.

Recurring Pattern
Disjointed
One Time
Seasonal
No Schedule

Recurring Pattern

Choose a Template ▼

Pattern

Weekly
Monthly

Day	Start Time	End Time	+ Add Shift
Sunday ▼	hh:mm	hh:mm	Delete

Every Week(s)
Delete All

Save this as a template

Pattern Range

Start Date

End on this date

after this many shifts

Check Shifts



PUBLIC SCIENCE
COLLABORATIVE

Disjointed

The “Disjointed” schedule is best for events that happen multiple times, but not on a regular schedule. The administrator setting up the schedule can add multiple shifts for different days and/or times. An example usage might be a series of three related events that happen on a Monday for one week, and a Wednesday and a Saturday the next week. This allows for all three to be scheduled as part of one volunteer activity.

Recurring Pattern **Disjointed** One Time Seasonal No Schedule

Disjointed Shifts

Date	Start Time	End Time	+ Add Shift
02/02/2026	10:00 AM	12:00 PM	Delete
02/11/2026	02:00 PM	04:00 PM	Delete
02/14/2026	12:00 PM	02:00 PM	Delete
			Delete All

One Time

One-time activities are scheduled for a specific date and time and will not repeat. This is best for individual events or unique activities that will not happen again in the near future.

Recurring Pattern Disjointed **One Time** Seasonal No Schedule

One Time Shift

Start Date Start Time End Time

Seasonal

Seasonal activities are available for a specific time period. This may be a specific week, month, or several-month period, for instance. This activity type is best for activities that are associated with a specific prolonged event or program, but one that does not have specific timed events. Seasonal activities could be thought of as unscheduled activities that are only available during a specific time period.

Recurring Pattern Disjointed One Time **Seasonal** No Schedule

Season Dates

Start Date

End Date

No Schedule

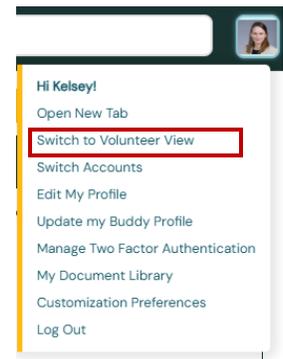
Activities without a schedule are the most simple type of activity and do not have any other scheduling options. An activity without a schedule can be recorded at any time, and can be recorded multiple times. These activities are available to volunteers so long as they are marked as "Active."

Recurring Pattern Disjointed One Time Seasonal **No Schedule**

Testing

To check if the activity appears as you intended, click on your profile button on the top right of Better Impact and click "Switch to Volunteer View". This allows you to Better Impact from your volunteer's view.

From the volunteer view, click the "Opportunities" tab to see which shifts your volunteers can sign up for and the "Schedule Tab" to see which shifts you are scheduled for. We always recommend testing to see if your activities appear as you intended. To navigate back to Better Impact as an "admin" click the "switch to admin view".



Additional Privacy Settings

Once you start to use scheduling, volunteers can see who is assigned to each shift from their volunteer view. We recommend keeping this feature turned off to protect the anonymity of your volunteers. To verify if this feature is turned off, navigate to the configuration menu and then select “Schedule Settings” under the “Activities” menu on the left.

The screenshot shows the Better Impact interface. At the top is a dark navigation bar with icons for Home, People, Communicate, Assign, Reports, and Configuration. The Configuration icon is highlighted with a red box. Below this is a sidebar menu under 'Activities' with links for Manage Activities, Shift Templates, Bulk Activity Updates, Feedback Fields, Schedule Settings (highlighted with a red box), Hours and Timeclock, and Settings. The main content area displays the 'Schedule Settings' form, which includes several checkboxes: 'Enable group scheduling' (unchecked), 'Show number of shift openings to volunteers' (checked), 'Allow volunteers to see who is assigned to an activity or activity shift' (unchecked and highlighted with a red box), 'Automatically confirm assignments when they are created' (checked), 'Warn administrators when a volunteer's shift assignment overlaps with other shift assignments for the volunteer' (checked), and 'Prevent volunteers from signing up for shifts that overlap with their existing assignments' (checked). A 'Save' button is located at the bottom right of the settings panel.

Next, ensure the “Allow volunteers to see who is assigned to an activity or activity shift” is unchecked and click “save”.