Working with the Occurrences Grid

The Occurrence Grid

On each Volunteer Opportunity Detail page is an Occurrence grid which lists the details of its one or more occurrences.

You can search for an occurrence starting on a specific date by typing the date in the search box (1) ("find by keyword) at the top of the grid.

You can also use the dropdown filters (2) in any column to see only the occurrence(s) you wish to view: (For example: use the posting status filter to just see the occurrences that are "published" or those with dates in the past.

The occurrence grid gives you an overview of information about each occurrence.

Depending on the permissions you've been granted, the following actions may be available in the action column of the grid:

- **Edit** - allows you to edit the occurrence info, changing the start date and time and end date and time, change the opportunity coordinator or the location of the occurrence.
- **Cancel:** Only available for date and time Specific Occurrences. This cancels the occurrence, unpublishes it from the public site, and sends an email notification to any volunteers who were signed up that the occurrence has been cancelled. It updates their connections to cancelled status and attendance status automatically.
- **Print Check-In Sheet:** - This will open a ,pdf with the names of all volunteers in confirmed status for that occurrence. You can use this check-in sheet to check-in volunteers at the project site, and later use it so you know who was and wasn't there, so you can report attendance after the occurrence has taken place.

The **Add New Occurrences** button (3) allows you to add additional occurrences for date and time specific opportunities. The process for adding a single or a recurring series of occurrences is exactly the same as the occurrence step in "Creating a Volunteer Opportunity" except you don't have to create the opportunity definition again.

The columns in the grid also give you a quick way to see details of each occurrence, along with some basic stats about each occurrence:

- the number of confirmed connections for that occurrence,
- the number of volunteers still needed (which is calculated based on the maximum attendance you've set for that occurrence),
- The Total Hours of confirmed service for that occurrence (calculated after you've reported attendance).

Occurrences for Date and Time Specific Volunteer Opportunities

Volunteer Opportunities with Schedule Type "Date and Time Specific" can have one or more occurrences. Each occurrence record defines:

- The date, start time and end time of that occurrence   (if they take place on the same day you can think of these as 'shifts"
- The Location for that particular occurrence (it can be different for each date and time or always the same)
- The Opportunity Coordinator for that particular occurrence.

Clicking on the Edit Action allows you to update this for any individual occurrence.

Clicking on the Add New Occurrence button allows you to add additional occurrences to a date and time specific opportunity.

> ♀ The Volunteer Opportunity will continue to be published on the public site up through the end date or its last occurrence. When there are no future occurrences, the volunteer opportunity will automatically be removed from the public site.   If you wish it to remain on the public site, add a new occurrence for some date in the future!

Occurrence for Individually Scheduled Opportunities

Volunteer Opportunities with Schedule Type "Individually Scheduled" only use **one** occurrence record. This is because each volunteer will be coming at a different date and time, and so all connections are made to one master occurrence record. Think of this is a 'time sheet' for the Volunteer Opportunity.

Occurrences

Actions	Start Date & Time	End Date & Time	Posting Status ▲	# of Confirmed Connections	Volunteer Still Needed	Total Hours	Opportunity Coordinator	Location
Edit | Print Check-In Sheet	8/18/2016 6:00 PM	12/31/2017 7:00 PM	This is approved and published for volunteers to sign-up.	41	459	25	Art Trout	Troutco Warehouse

The Date and End Date of an Individually Scheduled Opportunity defines the time period during which the opportunity will be visible on the public site, and volunteers can express interest in it.

Click the **Edit** action to **extend the end date** if you wish to keep recruiting volunteers past the current end date.

To 'unpublish' an Individually Scheduled Opportunity - edit the occurrence end date and set it to yesterday's date The opportunity will no longer be available on the public site once search is updated (usually about 5 minutes)..

> 💡 You can't 'cancel' an individually scheduled opportunity - because doing so would cancel all its existing connections. To unpublish, just adjust the end date of the occurrence.
>
> You can't add new occurrences to an Individually Scheduled Opportunity - because ISOs just use one occurrence record to track all the connections that take place on a large variety of dates and times.   (or may not have any dates and times associated with the connections if the Registration Type is "Express Interest Only"