

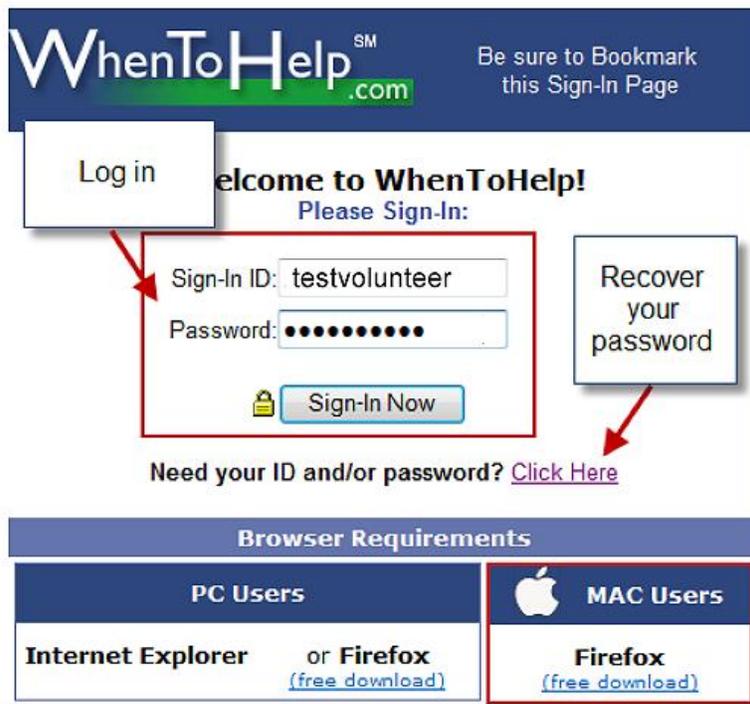
# WhenToHelp Basic Instructions

## Logging in

Go to <http://whentohelp.com>. Click on "Sign In" in the navigation bar near the top of the page.



Enter the log in ID and password that you received by email (or your personal password if you have changed it.) If you have forgotten your password, click on the link below the log in boxes to have it resent to you.



This will take you to the **WhenToHelp** home page:



# McGill Bird Observatory

## Welcome Test Volunteer

**What's New!**  
Mar 8, 2012 12:29pm

- [Show My Schedule](#)
To view your schedule
- [Show Everyone's Schedule](#)
To sign up for shifts
- [Change My Information \(Notifications, Phone, etc.\)](#)
- [Choose Times I Prefer to Help](#)
To change your personal information, preferences etc.
- [Enter Time Off \(Full or Partial Day\)](#)
- [Tradeboard - Pick Up Open Shifts](#)
- [Send a Message to My Coordinator](#)
- [Staff List](#)
- [Who Is Helping Right Now](#)
- [Bulletin Board](#)
- [Sign Out](#)

### Signing up for shifts

From the Home Page, click on **Show Everyone's Schedule**:

- [Show My Schedule](#)
- [Show Everyone's Schedule](#)
Click on Show Everyone's Schedule from the Home page.
- [Change My Information \(Notifications, Phone, etc.\)](#)
- [Choose Times I Prefer to Help](#)

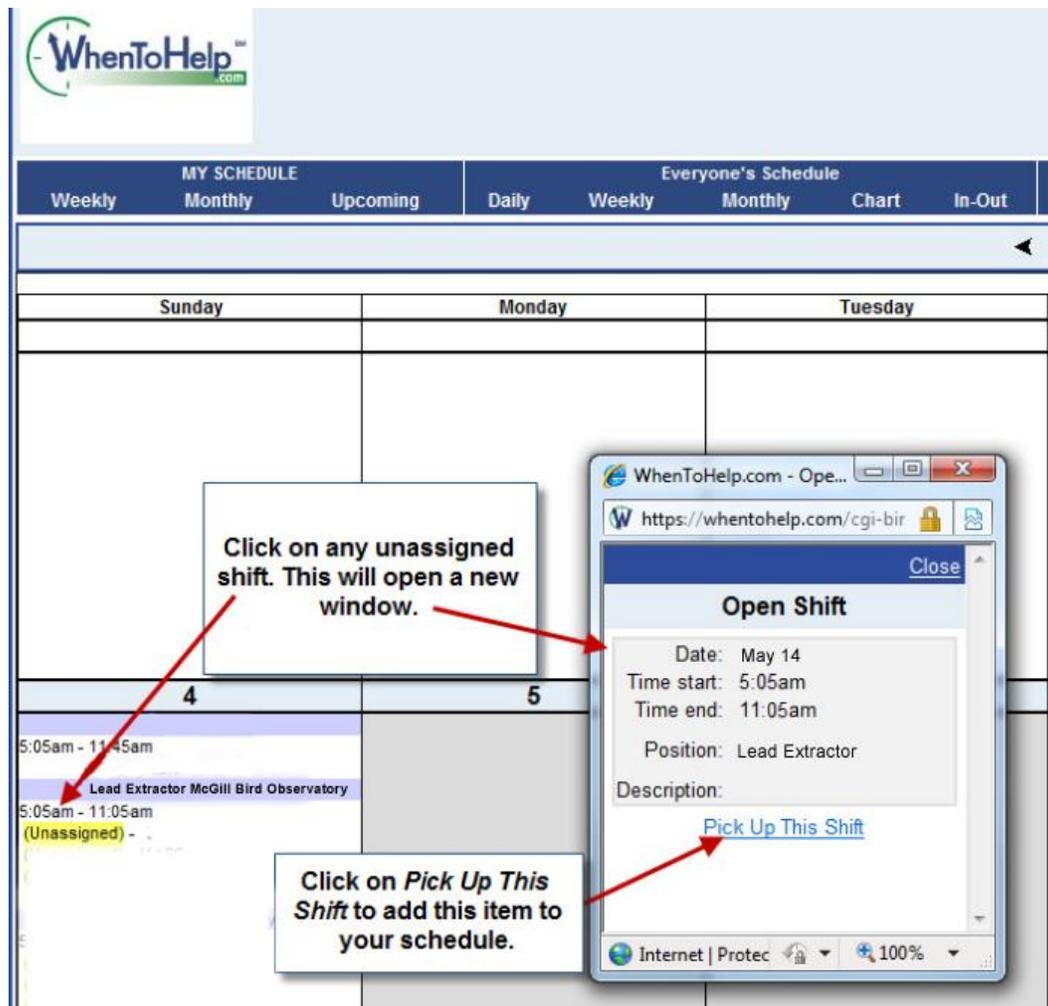
The "Monthly" view is the easiest to read. Click on **Monthly** under Everyone's Schedule.



This will open up a monthly calendar. Click on the arrows beside the month name to go to the next or previous month. In this view, you will be able to see the various types of shifts (census observer, lead extractor, extractor-in-training, observer, net assistant, scribe etc. that are available. These appear in blue bars under each date.

You will be able to see who has signed up for the shifts, and which shifts are still open (unassigned). The unassigned shifts are highlighted in yellow.

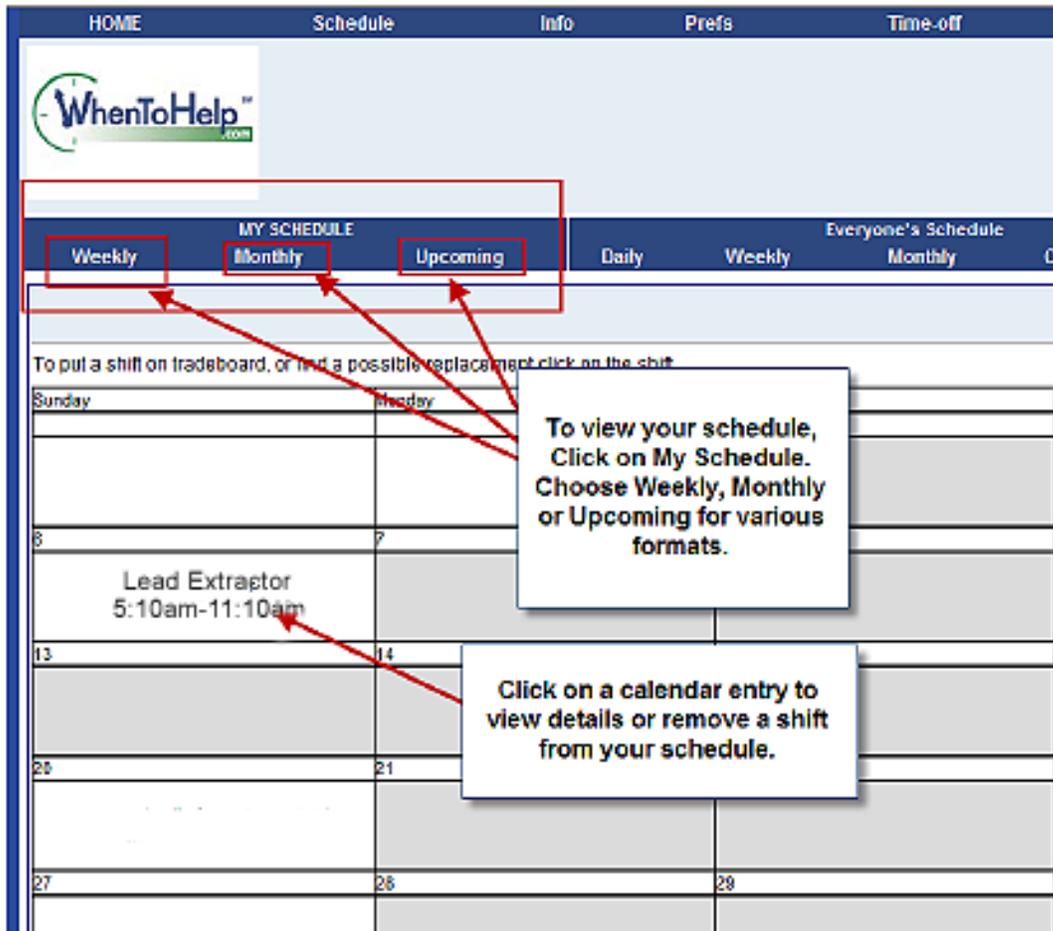
To register for a shift, click on a yellow unassigned listing under a position for which you are qualified. A new window will open with details about that shift. If you wish to add the shift to your schedule, click on "**Pick Up This Shift**".



You may not be eligible to sign up for all types of shifts. If you receive a message that you are not qualified for a certain position, and you believe you should be, please email us at [mbo@migrationresearch.org](mailto:mbo@migrationresearch.org) or use the messaging feature in **WhenToHelp**.

To review your own schedule, Click on My Schedule. The Weekly, Monthly, and Upcoming items will give you different views of the scheduling information.

Click on the shift in the calendar to open the details of the shift or to remove it from your schedule.



## Setting preferences

Your contact information:

Choose **"Change My Information"** from the Home Page Menu, or **"Info"** from the top Navigation Bar to view or change your contact information.



You can choose to make your phone and email information available to other volunteers or only to the Coordinator.

HOME Schedule Info Prefs Time-off Trades Messaging Staff On Now

 **McGill Bird Observatory**

**Test Volunteer**  
**My Information**

Sign-In ID: **TESTVOLUNTEER**  
[Change ID or Password](#)

Phone:

2nd Phone:

Cell:

All helpers can see my phone numbers  
 Only my coordinator can see my phone numbers

E-Mail: [testvolunteer@abcdef.com](mailto:testvolunteer@abcdef.com) [Edit My E-Mail Addresses](#)

All helpers can see my e-mail addresses  
 Only my coordinator can see my e-mail addresses

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The following information can only be viewed by your coordinator:

Address:

Address 2:

City, State, Zip:

Comments:

You can control who can see your telephone number and email

**Notifications (optional):**

Follow the steps above for changing your personal information. Click on **Edit My Email Addresses**. This will open up a new window:

Send My Notifications - Mozilla Firefox

whentohelp.com https://whentohelp.com/cgi-bin/w2h.dll/empnotifications.htm?SID=609652861457D

Close

**Send My Notifications via E-mail or Text Message**

E-MAIL Address	Notifications
testvolunteer@abcdef.com	<input type="checkbox"/> Forward W2H Messages <input type="checkbox"/> Published Shift Changed <input type="checkbox"/> Schedule Published/Reminders <a href="#">Select / ADD Notifications</a> <a href="#">Delete Address</a>

[Add New Address](#)

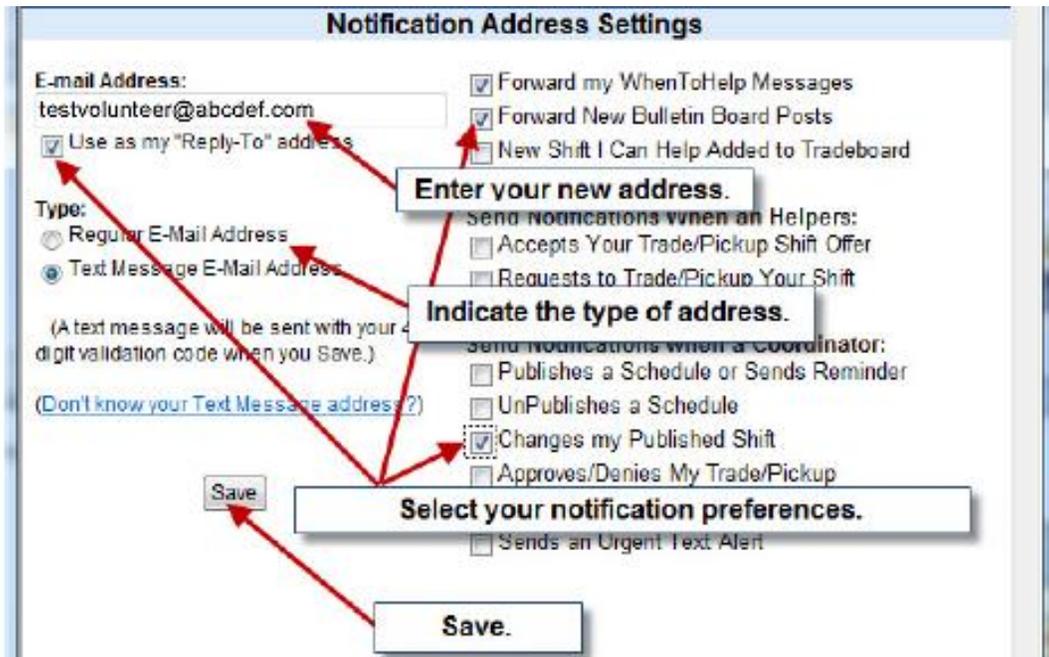
We do not charge to send, but you may be charged to receive text messages - please note that some of these notification options could generate a lot of text messages - so choose carefully and be sure to check your cell phone organization's charges and limitations before setting up.

Click to add a new email or text-message address .

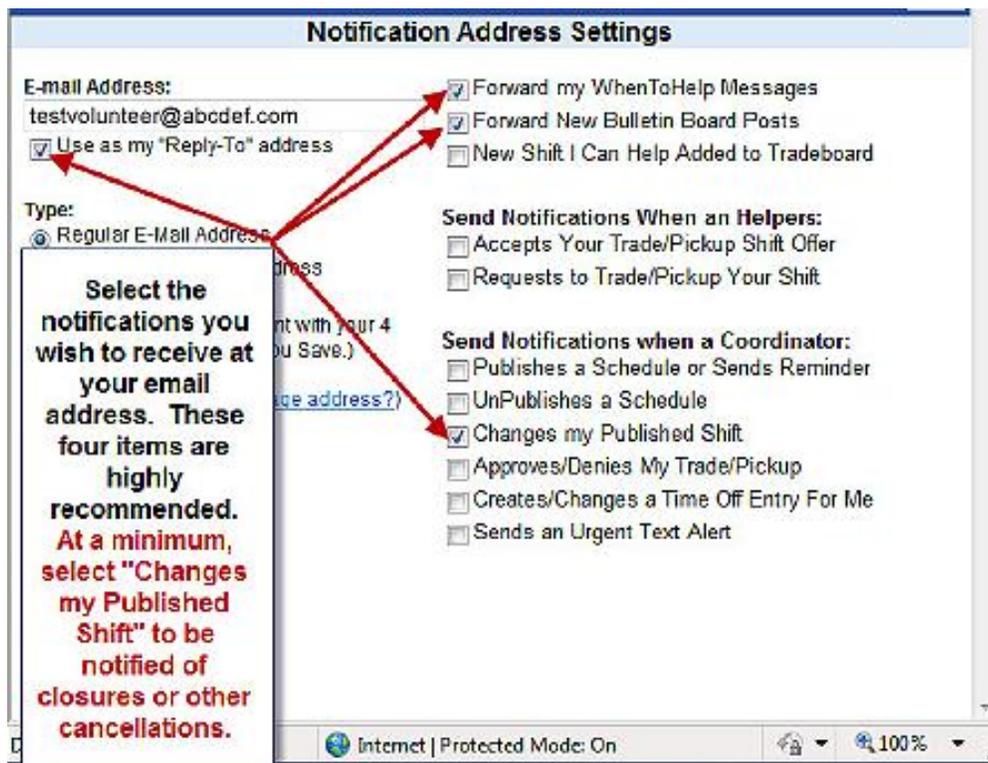
Click to change which notifications you receive.

To add a new address for email or text messages, click on **"Add New Address"**.

- 1 Enter your new address.
- 2 Select whether this is an email address or a text messaging address.
- 3 Select your notification options (see below).
- 4 Save.



You can receive your messages through your email address by selecting notifications. At a minimum, you should select **"Changes my Published Shift"** so that you receive notification about closures or other cancellations. We also recommend you select **"Use as my "Reply To" address"**, **Forward my WhenToHelp Messages** and **Forward New Bulletin Board Posts**.



## Scheduling Preferences (optional):

You can also use **WhenToHelp** to identify your preferred days or dates, or days that you can't volunteer. You can also indicate your preferred volunteer positions.

Click on **Pref** in the top Navigation Bar. Then select the dates/days/positions buttons and enter your preferences.

The screenshot shows the top navigation bar with links: HOME, Schedule, Info, Prefs, Time-off, Trades, Messaging, Staff, On Now, Bulletins, HELP. The user is logged in as 'McGill Bird Observatory Test Volunteer' on 'Mar 9, 2012 12:23pm'. A callout box points to the 'Prefs' link, stating: 'Click on Prefs in the Navigation Bar to set your date or position preferences.' Below the navigation bar is a calendar grid for the week of Mar 5, 2012. A callout box over the calendar states: 'You can set your preferred dates and positions to assist with scheduling. It would be helpful to know the days or dates that you are not available to volunteer.' Below the calendar are three buttons: 'Set SPECIFIC DATE Preferences (or click a date above to edit that day)', 'Set REPEATING WEEKLY Preferences', and 'Set POSITION Preferences'. A legend indicates: 'Date has specific preferences' (blue), 'prefer' (green), 'dislike' (red), 'cannot help' (red), and 'no preference' (grey).

**Note:** Entering preferences in no way guarantees that your schedule will follow these times nor that your existing schedule will be changed in any way, but may increase the likelihood that you are assigned to times that you prefer.

For more information, click on **Help** in the Top Navigation Menu bar.

Many thanks to Anne Nightingale of Rocky Point Bird Observatory for introducing us to **WhenToHelp** software, allowing us to explore the programme via her site and for her very clear and precise document *When To Help Instructions*<sup>1</sup> on which we based this document.

<sup>1</sup> Nightingale, Ann, 28 May, 2010 *When To Help Instructions*. Rocky Point Bird Observatory, British Columbia. 11 pages.