



Volunteer Database Instructions

Once you've logged into your account at admin.readwithme.org.uk, you'll land on the main dashboard. This has several tabs available for quick shortcuts to specific areas of the volunteer database and there is also the main menu on the left hand side. On the dashboard, you'll also have a small table of recently signed up volunteers. A volunteer who has completed the registration form will be shown with status 'pending' and those who are yet to complete the final step as 'Unfinished Registration'. You can quickly approve or delete these from the dashboard.

The screenshot shows the Admin dashboard with a sidebar menu on the left containing: Dashboard, Profile, Mailing List, Add New Contacts, Volunteers, Schools, Policies, and Data Fields. The main content area has three cards: 'Volunteer Database' with a 'Go to Database' button, 'Volunteer Registration' with a link to register.readwithme.org.uk, and 'Data Fields' with a 'Data Fields' button. Below these is a table titled 'Recent Volunteer Registrations' with columns: Name, Status, View, Approve, and Delete. The table contains two rows: Joe Bloggs (Unfinished Registration) and Mike Smith (Pending). Red arrows point from the 'Go to Database' button to the text 'This will take you straight to volunteer database', from the 'Approve' column to 'Change their status to active', and from the 'Delete' column to 'This will permanently delete this record'. A blue circular arrow icon is also visible at the bottom right of the table.

Name	Status	View	Approve	Delete
Joe Bloggs	Unfinished Registration	View	Make Active	Delete
Mike Smith	Pending	View	Make Active	Delete

This will take you straight to volunteer database

Change their status to active

This will permanently delete this record

Volunteers in this table will require your approval before they become 'Active' volunteers.

New Registration Form

The registration form is now located at register.readwithme.org.uk and this is a link you can give to any volunteer. The form has a new, multi-page format to make it less daunting to fill out.

If a volunteer stops the registration partway through, the details they've entered so far are saved so you can follow up. (And you can then input missing details yourself later)

The screenshot shows the 'Read With Me Registration' form. It is titled 'Step 1 of 6. You are 0% done.' and instructs the user to 'Start by entering your email address.' There is an input field for 'Email Address' and a 'Next Step' button. A note states 'This form will take about 25 minutes to complete.' The footer includes 'Copyright Read With Me CIC 2022. Built by Jake Palmer.'

Get in Touch!

If you have any issues or problems with these instructions, please do not hesitate to get in touch!

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Volunteer Status

Volunteers are assigned a status as soon as they start registration. You can then change these manually yourself to approve them and then manage their volunteering career. There are 5 self-explaining statuses:

- Unfinished Registration
- Pending
- Active
- On-Hold
- Archived

You can also permanently delete a volunteer from the 'Edit Volunteer Profile' page: this requires a specific security clearance.

The Database

The volunteer database is most easily accessed from the left sidebar menu. By default, only active volunteers are displayed.

You can use the options at the top of table to change these filters and alter the sorting order. Also, the search field allows you to search the table in real time by typing a snippet of a volunteer's name.

The screenshot shows the 'Admin' interface with a sidebar menu on the left. The 'Volunteers' menu item is highlighted with a red box. The main content area is titled 'Volunteer Database' and includes sorting and filtering options. A search bar is present with the text 'Start typing your search here!'. A table lists two volunteers, 'Jake 55' and 'Jake 56', both with 'Active' status. Each row has a 'View' button. Red arrows point from text annotations to the sorting links, the search bar, and the 'View' button for Jake 56.

Admin Read With Me (readwithme.org.uk) Jake

Volunteer Database **Change sort and filter options with these links.**

Sorting by name. [Sort by Date Signed Up.](#)

Showing active volunteers only. [Show all.](#)

Search for Volunteers **Start typing your search here!**

Name	Status	Profile
Jake 55	Active	View
Jake 56	Active	View

View (and then edit) this volunteer's profile

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Profile View

When you view a volunteer's profile, you'll be able to see every piece of data saved about them.

Admin Read With Me (readwithme.org.uk) Jake ▾

Viewing Volunteer Profile [Return to Volunteer List](#)

Joe Bloggs (Active) [Edit Profile](#)

Date Registered: 12 Sep 2022 (02:20)
Email Address: jbloggs@example.com
Phone Number: 0118 999 881 999 119 725 3
First Line of Address: 12 Fenchurch Street
Preferred Form of Contact: Text Message

Current Status

Edit this profile
(Requires Editing Permission Level)

This time is when they started completing the registration form

Fields with missing information will be highlighted. You can click on the highlight to start editing.

Profile Edit

Editing the profile is relatively straightforward! Just make sure you click the save button at the very bottom of the page to save all changes before you leave!

For uploading any documents to a profile, you'll need to make sure you save any changed details first as clicking a button to upload a document will take you away from the edit tab!

Files can only be uploaded by administrators and cannot be added to the registration form for security reasons. Only PDF documents can be uploaded (this is for security and consistency). You can look up whether a field is part of the registration form or not from the 'Data Fields' tab*.

*This tab requires a high 'security clearance' so it may not be available for your account.

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Schools Tab

To manage the schools available within the volunteer profiles, navigate to the 'schools' tab. Depending on your permission level, you can edit schools and add new ones.

Your account requires a specific permission level to see edit and delete buttons.

School Name	Edit	View Volunteers	Delete
Bluecoat	Edit	View Volunteers	Delete
British	Edit	View Volunteers	Delete

School Name
(As shown on the school dropdown on each profile)

This shortcut to the volunteer database lets you filter volunteers by school.

Scroll down on the volunteers page for a form to add a new school. School names cannot be edited; if you need to rename a school, delete the school and add the new one. This will not change any volunteer data.

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