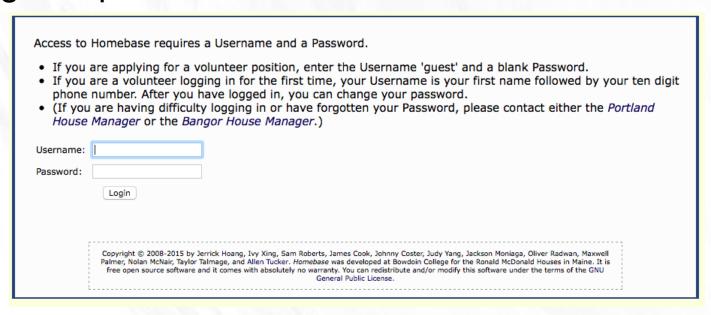# About *Homebase*

Homebase is a mature web-based application for volunteer database management and scheduling with:

- *Secure access* for volunteers and admins only
- *Customization* to fit any calendar schedule
- Easy *volunteer database maintenance*
- Tools for *reporting volunteer hours*
- Publicly-accessible volunteer *application form*
- Intuitive *ease of use*
- *Built-in step-by-step help* pages
- *High regard* from current users
- *Free customization, installation, and support* from NPFI

Homebase is Free Open Source Software

Secure Access

Login required for access to calendar and volunteer data:

Access to Homebase requires a Username and a Password.

- If you are applying for a volunteer position, enter the Username 'guest' and a blank Password.
- If you are a volunteer logging in for the first time, your Username is your first name followed by your ten digit phone number. After you have logged in, you can change your password.
- (If you are having difficulty logging in or have forgotten your Password, please contact either the *Portland House Manager* or the *Bangor House Manager*.)

Username: [   ]
Password: [   ]

[Login]

Volunteers log in with their name and phone:

Username: Volunteer7037806282
Password: •••••••••••••••••••

[Login]

Calendar Schedule

Each week's calendar appears to the volunteer or manager as a schedule of 3-hour shifts

RMH Portland home | about | help | calendars: house, guest chef, activity | around the house | logout

<< Previous Week   (edit this week)   Next Week >>

Portland House Calendar: July 17, 2017 to July 23, 2017 (week 28: even)

	17 Monday	**18** Tuesday	**19** Wednesday	**20** Thursday	**21** Friday	**22** Saturday	**23** Sunday	
9am	Jane Jones Cathy Jones Cheryl Jones	Jane Jones Stacey Jones	Jeannie Jones Kym Jones	Volunteer Jones **Vacancies (1)**	Bobbi Jones Meg Jones **Vacancies (1)**		Gaye Jones	9am
10am						**Vacancies (1)**		10am
11am								11am
12pm	Peter Jones Cheryl Jones	Mary Ann Jones Gibbs Jones	Ellen Jones **Vacancies (1)**	Thorne Jones Meg Jones	Suzanne Jones **Vacancies (1)**	**Vacancies (1)**		12pm
1pm								1pm
2pm								2pm
3pm	Maureen Jones Claire Jones	Becky Jones Betsy Jones	Nancy Jones **Vacancies (1)**	Linda Jones Sue Jones	Phyllis Jones Margi Jones **Vacancies (1)**		**Vacancies (1)**	3pm
4pm								4pm
5pm								5pm
6pm	Vickie Jones Estelle Jones	Josh Jones April Jones	Jody Jones				**Vacancies (1)**	6pm
7pm								7pm
8pm - 9pm								8pm - 9pm
night					**Vacancies (1)**	**Vacancies (1)**		night

Calendar shift editing

Selecting a shift on this calendar allows the volunteer or manager to add or remove a volunteer from that shift.

RMH Portland home | about | help | calendars: house, guest chef, activity | around the house | logout

Portland House Shift: Thursday July 20, 2017 9am to 12pm

Find Volunteers To Fill Vacancies	Generate Sub Call List
Volunteer Jones	Remove Person
vacancy	Assign Volunteer

Back to Calendar

Note: *Homebase* can be customized so that this activity is restricted to managers only.

Master Schedule

Each calendar week's shifts are automatically generated and populated using the master schedule as a template.

RMH Portland home | about | help | calendars: house, guest chef, activity | around the house
master schedule | volunteers: search, add, screenings | reports | logout

Today is Wednesday July 19, 2017. This is week 29 (odd) of the year, and the 3rd Wednesday of the month

	Monday	Tuesday	Wednesday	Thursday	Friday	
Portland House Master Schedule -- weekday shifts						
odd 9-12	Jane Jones Cathy Jones Cheryl Jones	Jane7038859127 **Vacancies (1)**	Aynne Jones Charlie Jones	Cathy Jones Meg Jones	Sally Jones Becky Jones	odd 9-12
12-3	Cheryl Jones **Vacancies (1)**	Cindy Jones **Vacancies (1)**	John Jones **Vacancies (1)**	Marjorie Jones **Vacancies (1)**	Ellen Jones **Vacancies (1)**	12-3
3-6	Robin Jones Claire Jones	Becky7037725009 **Vacancies (1)**	Amy Jones Ann Jones	Nancy Jones Suzanne Jones	Phyllis7032325963 **Vacancies (2)**	3-6
6-9	Nonie Jones **Vacancies (1)**	Kara Jones Daniel Jones	Marilee Jones Claudia Jones	Jody Jones Allyson Jones		6-9
night					**Vacancies (1)**	night
even 9-12	Jane Jones Cathy Jones Cheryl Jones	Jane7038859127 **Vacancies (1)**	Jeannie Jones Kym Jones	**Vacancies (2)**	Bobbi Jones Meg Jones **Vacancies (1)**	even 9-12
12-3	Peter Jones Cheryl Jones	Mary Ann Jones Gibbs Jones	Ellen Jones **Vacancies (1)**	Thorne Jones Meg Jones	Suzanne Jones **Vacancies (1)**	12-3
3-6	Maureen Jones Claire Jones	Becky7037725009 **Vacancies (1)**	Nancy Jones **Vacancies (1)**	Linda Jones Sue Jones	Phyllis7032325963 **Vacancies (2)**	3-6
6-9	Vickie Jones Estelle Jones	Josh Jones April Jones	Jody Jones Lilly2158349209	Shay6175012425 **Vacancies (1)**		6-9
night					**Vacancies (1)**	night

Note: Master scheduling is restricted to managers.

Master Schedule Customization

Each non-profit can customize its *Homebase* master schedule and calendar shift structure by:
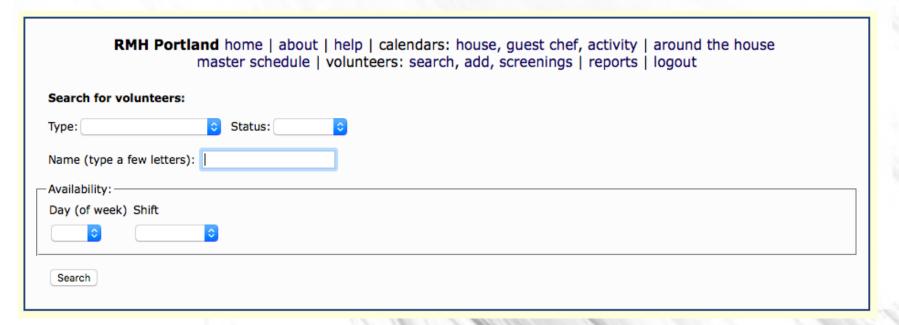
- Redefining shift days and hours throughout the week (in this example, weekday shifts are 3 hours each and weekend shifts vary in length)

- Redefining frequency of shift assignments (in this example, a volunteer may be scheduled for a particular day of each week, alternating weeks, or a certain week of every month)

The *Homebase* master schedule, calendar, volunteer profile, and reports can thus be shaped to match the non-profit's current scheduling practices.

Volunteer Database Search

Managers can search for volunteers in different ways:

- By type (volunteer, guest chef, manager)
- By status (applicant, active, on leave)
- By name
- By availability – day of week and/or shift (e.g., 9-12, 12-3, ...)

RMH Portland home | about | help | calendars: house, guest chef, activity | around the house
master schedule | volunteers: search, add, screenings | reports | logout

Search for volunteers:

Type: [▾] Status: [▾]

Name (type a few letters): [|]

Availability:

Day (of week) Shift

[▾] [▾]

[Search]

Volunteer Database Editing
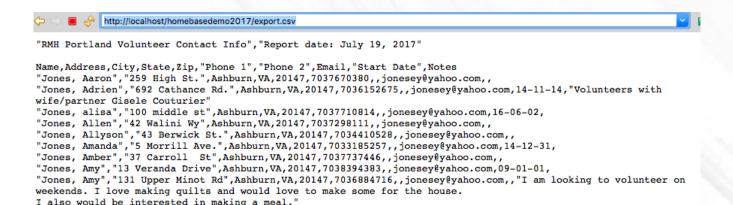
Managers can easily edit volunteer data:

RMH Portland home | about | help | calendars: house, guest chef, activity | around the house
master schedule | volunteers: search, add, screenings | reports | logout

Personnel Edit Form   (View **Log Sheet**)
Here you can edit, delete, or reset the password for a person in the database.
When finished, hit **Submit** at the bottom of this page.
(* denotes required information).

Date: [   ]

Location*: ● Portland House   ○ Bangor House

Personal information:

First Name: Meg   Last Name*: [Jones   ]

Address*: [42 Walini Way   ]

City*: [Ashburn   ]   State, Zip*: [VA ◊], [20147]

Primary Phone: 703-729-8111

Status:* [active ◊]

Position type:* (check one or more)

☑ House Volunteer   ☑ Weekend Manager   ☐ Flex shift   ☐ Guest Chef   ☐ Events/Special projects   ☐ Manager

Availability:*

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
☐ 9-12	☐ 9-12	☐ 9-12	☐ 9-12	☐ 9-12	☐ 10-1	☐ 9-12
☐ 12-3	☐ 12-3	☐ 12-3	☑ 12-3	☐ 12-3	☐ 1-4	☐ 2-5
☐ 3-6	☐ 3-6	☐ 3-6	☐ 3-6	☐ 3-6		
☐ 6-9	☐ 6-9	☐ 6-9	☐ 6-9	☐ 6-9		☐ 5-9
				☐ night	☐ night	

Hit [Submit] to submit these edits.

☐ Check this box and then hit [Delete] to delete this entry.
☐ Check this box and then hit [Reset Password] to reset this person's password.

Reporting Tools

Five different reports are available (to managers only)

RMH Portland Volunteer Reports
Today's date: July 18, 2017

Select Report Type:	Date Range:	Last Name Range:
Total Hours	from :	from :
Shifts/Vacancies		
* Volunteer Birthdays	to : 17-08-01	to :
* Volunteer History		
* Volunteer Contact Info		

To view report, hit [Submit] .   * To save the report, check here ☐, hit 'Submit' again, and browse to 'export.csv'.

RMH Portland Shifts/Vacancies Report
through August 1, 2017

	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Total
Morning	12/0	8/0	6/0	6/1	7/1	6/3	5/2	50/7
Early PM	8/2	8/2	6/3	6/2	6/3	6/3	6/2	46/17
Late PM	8/0	8/0	6/1	6/0	9/3	0/0	0/0	37/4
Evening	8/2	8/0	6/0	6/0	3/0	0/0	5/2	36/4
Night	0/0	0/0	0/0	0/0	6/3	6/3	0/0	12/6
Total	36/4	32/2	24/4	24/3	31/10	18/9	16/6	181/38

And can be downloaded in Excel format:

http://localhost/homebasedemo2017/export.csv

```
"RMH Portland Volunteer Contact Info","Report date: July 19, 2017"

Name,Address,City,State,Zip,"Phone 1","Phone 2",Email,"Start Date",Notes
"Jones, Aaron","259 High St.",Ashburn,VA,20147,7037670380,,jonesey@yahoo.com,,
"Jones, Adrien","692 Cathance Rd.",Ashburn,VA,20147,7036152675,,jonesey@yahoo.com,14-11-14,"Volunteers with
wife/partner Gisele Couturier"
"Jones, alisa","100 middle st",Ashburn,VA,20147,7037710814,,jonesey@yahoo.com,16-06-02,
"Jones, Allen","42 Walini Wy",Ashburn,VA,20147,7037298111,,jonesey@yahoo.com,,
"Jones, Allyson","43 Berwick St.",Ashburn,VA,20147,7034410528,,jonesey@yahoo.com,,
"Jones, Amanda","5 Morrill Ave.",Ashburn,VA,20147,7033185257,,jonesey@yahoo.com,14-12-31,
"Jones, Amber","37 Carroll  St",Ashburn,VA,20147,7037737446,,jonesey@yahoo.com,,
"Jones, Amy","13 Veranda Drive",Ashburn,VA,20147,7038394383,,jonesey@yahoo.com,09-01-01,
"Jones, Amy","131 Upper Minot Rd",Ashburn,VA,20147,7036884716,,jonesey@yahoo.com,,"I am looking to volunteer on
weekends. I love making quilts and would love to make some for the house.
I also would be interested in making a meal."
```
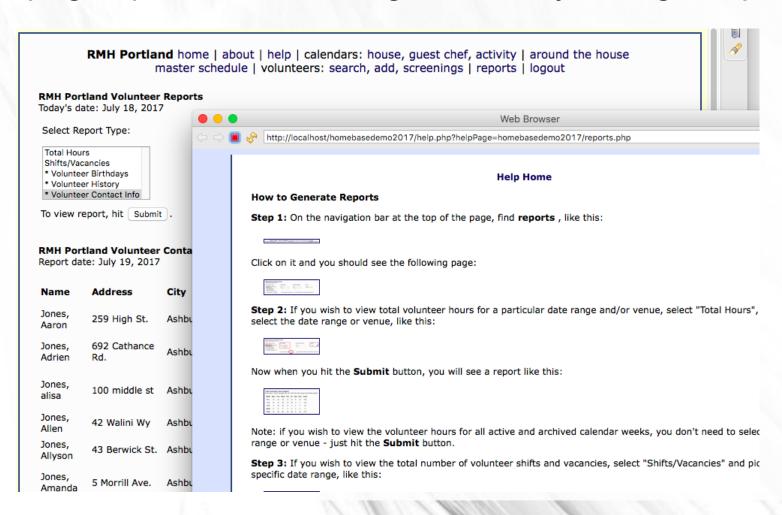
Volunteer Application Form

Any site visitor can login as "guest" for the sole purpose of applying to become a volunteer.

This data is immediately available to the manager, who uses it for follow-up, applicant screening, etc.

apply | logout

Volunteer Service Application
Please provide as much information as you can.
When finished, hit **Submit** at the bottom of this page, and then **logout**.
(* denotes required information).

Date: [   ]

Location*: ◯ Portland House   ◯ Bangor House

Personal information:

First Name*: [new]   Last Name*: [applicant]

Address*: [   ]

City*: [   ]   State, Zip*: [ME ◇] , [   ]

Primary Phone*: [   ] ◯home ◯cell ◯work

Secondary Phone: [   ] ◯home ◯cell ◯work

Birth date: [   ] (Applicants younger than 18 should contact RMH for a separate application)

Email address: [   ]

Employment:

Current Employer: [   ]   Position: [   ]

Detailed Help

All pages provide detailed guidance by hitting "help"

High praise: client testimony

- "We'll be able to do all of our scheduling online; there are innumerable benefits."

- "It's really tremendous, and we're so appreciative."

- "You've truly given us a legacy of your heart. For our community to get this kind of help is wonderful."

Future support and full ownership

- NPFI will customize *Homebase* to fit a non-profit's scheduling and volunteer profiles

- NPFI will facilitate embedding *Homebase* in the non-profit's web site

- NPFI will resolve *Homebase* issues in a timely manner

- The non-profit will own and freely use its custom version of *Homebase* and its volunteer database

- NPFI will charge no fees of any sort for this work

To learn about how NPFI can customize Homebase for your non-profit, contact Allen Tucker at allen@npfi.org.