

How-To: Batch Request Volunteers

1. Introduction

You can batch request several volunteers at a time. There are two options to do that: by copying the information of a volunteer that you have already requested or by uploading the information of several users before adding the details of the request.

These instructions assume that you already know how to access the [Volunteer Request](#) website.

2. Copying an Existing Request

This option is best when all the requested volunteers will share the same job summary and training needs.

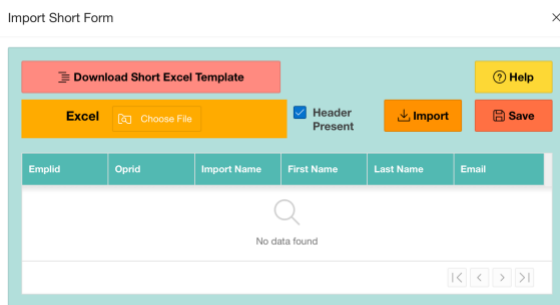
1. In the **Volunteer Requests – Request Approvals** page, click the **Job Title** of the user that you want to use as the original to make copies.

The screenshot shows the 'My Requests' page with a table of requests. The table has columns: ID, Person ID, Emplid, Name, Job Title, Status, Deptid, Requester, Creation, Start Date, End Date, Info, and Action. The first row shows a request for 'Alfred' with 'Test 1' as the job title. A red box highlights the 'Job Title' column for this row, and a red arrow points to it.

2. The **Request Maintenance** page will open displaying the user's information. Click the **Import** button.

The screenshot shows the 'Request Maintenance' page. It displays personal data for a user named 'Michael' and request details. At the bottom, there is a table with columns: Account, Fund, Dept ID, Program, Class, and Project. A red box highlights the 'Import' button, and a red arrow points to it.

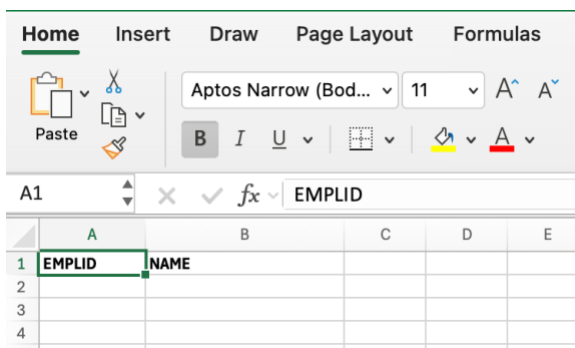
- The **Import Short Form** pop-up window will open.



- Click the **Download Short Excel Template** button to download an Excel file named **VOLUNTEER_IMPORT_TEMPLATE_SHORT.xlsx** to your computer.



- Open the downloaded file from wherever your computer downloads the files. The file will show two columns, one for EMPLID and the other for the Name of the user.



- Fill out the Employee ID and Name for each of the new volunteers and save the file wherever you want in your computer. You can rename the file if you want.

	A	B	C
1	EMPLID	NAME	
2		Anthony Baker Ortiz	
3		Harold Sing	
4		Michelle Williams	
5	0123456789	Test Person	
6			
7			
8			

- Click the **Choose File** button inside the Excel block of the Import Short Form pop-up window.



- The name of the file will be displayed in the space where the button was. Click the **Import** button.



9. After a brief moment, the list of users will appear in the **Import Short Form** pop-up window displaying their basic information. Verify the identity of the user by matching the Import Name (which you typed in the form) with the First and Last Names, as well as the email.

Emplid	Oprid	Import Name	First Name	Last Name	Email
123456789		Anthony Baker...	Anthony	Baker Ortiz	@hum...
		Harold Sing	Harold	Singh	@humbol...
		Michelle Willia...	Michelle	Williams	@humbold...

If there is an incorrect Employee ID or one that's not in PeopleSoft, it will be highlighted in yellow. You can close the window and fix the information, or you can leave it like that and it will be ignored.

10. In this example, we are going to ignore the incorrect Employee ID. To create the request for the users, click the **Save** button.

11. The **Import Short Form** pop-up window will display a message confirming the action.

12. You can close the pop-up window by clicking the **X** on the top right corner.

13. Click the **Exit** button to go back to the main page.

14. Inside the **My Requests** block, you'll see the list of the new requests ready to be submitted. Skip to **Step 4. Submit New Requests below** to continue.

ID	Person ID	Emplid	Name	Job Title	Status	Deptid	Requester	Creation	Start Date	End Date	Info	Action
			Micha...	Test f...	New	D00010	Alfred...	11-24...	11-14...	11-14...	i	
			Harol...	Test f...	New	D00010	Alfred...	11-24...	11-14...	11-14...	i	
			Antho...	Test f...	New	D00010	Alfred...	11-24...	11-14...	11-14...	i	
			Micha...	Test f...	Info...	D00010	Alfred...	10-13...	11-14...	11-14...	i	
			Alfred...	test	Info...	D00010	Alfred...	11-13...	11-27...	11-27...	i	
			Jesse...	TEST	Acce...	D00010	Alfred...	11-13...	11-27...	11-27...	i	

Total 6

3. Import Multiple Users with Different Attributes

The second batch import option is appropriate when you want to request multiple volunteers that have different job summaries and training needs.

1. Click the **Import** button inside the **My Requests** block



2. The **Import Long Form** pop-up window will open.

3. Click the **Download Long Excel Template** button to download an Excel file named **VOLUNTEER_IMPORT_TEMPLATE_LONG.xlsx** to your computer.



4. Open the downloaded file from wherever your computer downloads the files.

EMPLID	NAME	(FACULTY or STAFF) Volunteer	DEPTID	START DATE	END DATE	JOB TITLE	JOB SUMMARY	DEPT CHAIR (EMPLID)	MANAGER (EMPLID)	DRIVER (Y/N)	TRAVEL (Y/N)	MANAGER (Y/N)	CARE (Y/N)	ACADEMIC CREDIT (Y/N)	ACTIVE CPH STAFF (Y/N)	ACTIVE CPH STUDENT (Y/N)	ACTIVE CPH FACULTY (Y/N)	LEVEL 1 DATA ACCESS (Y/N)	SENSITIVE PER HR0017-17 (Y/N)
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The file contains the following columns:

- a. EMPLID
- b. NAME
- c. (FACULTY or STAFF) Volunteer
- d. DEPTID
- e. START DATE
- f. END DATE
- g. JOB TITLE

- h. JOB SUMMARY
- i. DEPT CHAIR (EMPLID)
- j. MANAGER (EMPLID)
- k. DRIVER (Y/N)
- l. TRAVEL (Y/N)
- m. MINORS (Y/N)
- n. CARE (Y/N)
- o. ACADEMIC CREDIT (Y/N)
- p. ACTIVE CPH STAFF (Y/N)
- q. ACTIVE CPH STUDENT (Y/N)
- r. ACTIVE CPH FACULTY (Y/N)
- s. LEVEL 1 DATA ACCESS (Y/N)
- t. SENSITIVE PER HR2017-17 (Y/N)

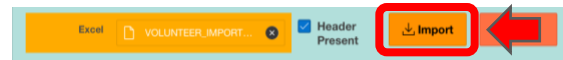
5. Fill out a row for each volunteer request as noted above and save the file wherever you want in your computer. You can rename the file if you want.

EMPLID	NAME	(FACULTY or STAFF) Volunteer	DEPTID	START DATE	END DATE	JOB TITLE	JOB SUMMARY	DEPT CHAIR (EMPLID)	MANAGER (EMPLID)	DRIVER (Y/N)	TRAVEL (Y/N)	MINORS (Y/N)	CARE (Y/N)	ACADEMIC CREDIT (Y/N)	ACTIVE CPH STAFF (Y/N)	ACTIVE CPH STUDENT (Y/N)	ACTIVE CPH FACULTY (Y/N)	LEVEL 1 DATA ACCESS (Y/N)	SENSITIVE PER HR2017-17 (Y/N)
1	Harold Sing	Faculty	D40020	12/15/20	12/15/20	Test Faculty Volunteer Title	This is a test			Y	N	N	N	N	N	N	N	N	N
2	Michelle Williams	Staff	D40020	12/15/20	12/15/20	Test Staff Volunteer Title	This is a test			Y	N	N	N	N	N	N	N	N	N

6. Click the **Choose File** button inside the Excel block of the **Import Long Form** pop-up window.



7. The name of the file will be displayed in the space where the button was. Click the **Import** button.



8. After a brief moment, the list of users will appear in the **Import Long Form** pop-up window displaying their basic information. Verify the identity of the user by matching the Import Name (which you typed in the form) with the First and Last Names, as well as the email.

Import Long Form

Download Long Excel Template

Excel Choose File

Header Present

Import

Save

Help

Emplid	Oprid	Import Name	First Name	Last Name	Email	Deptid	Job Title
		Harold Sing	Harold	Singh	hsh...	D40020	Test Facult...
		Michelle ...	Michelle	Williams	ihu...	D40020	Test Staff ...

1 - 2 of 2

If there is an incorrect Employee ID or one that's not in PeopleSoft, it will be highlighted in yellow. You can close the window and fix the information, or you can leave it like that and it will be ignored.

9. To create the request for the users, click the **Save** button.

Import Long Form

10. The **Import Long Form** pop-up window will display a message confirming the action.

Import Long Form

11. You can close the pop-up window by clicking the **X** on the top right corner.

Import Short Form

12. Click the Refresh button in the **My Requests** block to reveal your new imported volunteers.

<Optional Bulk Comments> Bulk Process Import

Status: OPEN Name is Like

13. The list of new imported volunteers will appear in the list as “New” and can be edited before submitting.

ID	Person ID	EmpId	Name	Job Title	Status	DeptId	Requester	Creation	Start Date	End Date	Info	Action
			Micha...	Test S...	New	D40020	Alfred...	11-24...	12-10...		i	
			Harold...	Test F...	New	D40020	Alfred...	11-24...	12-10...		i	
			Antho...	Test f...	New	D00010	Alfred...	11-24...	11-14...		i	
			Harol...	Test f...	Submi...	D00010	Alfred...	11-24...	11-14...		i	
			Micha...	Test f...	Submi...	D00010	Alfred...	11-24...	11-14...		i	
			Micha...	Test f...	Infot...	D00010	Alfred...	10-13...	11-14...		i	
			Alfred...	test	Infot...	D00010	Alfred...	11-13...	11-27...		i	
			Josep...	TEST	Acces...	D00010	Alfred...	11-13...	11-27...		i	

4. Bulk Submit New Requests

The process to submit the newly imported requests in bulk is the same for both types of bulk requests.

1. You can open each request and submit it individually as you normally would, or you can batch submit all of them at the same time. To submit all of them at once, click the **Action** cell to open the menu.

ID	Person ID	EmpId	Name	Job Title	Status	DeptId	Requester	Creation	Start Date	End Date	Info	Action
			Micha...	Test f...	New	D00010	Alfred...	11-24...	11-14...		i	
			Harol...	Test f...	New	D00010	Alfred...	11-24...	11-14...		i	
			Antho...	Test f...	New	D00010	Alfred...	11-24...	11-14...		i	
			Micha...	Test f...	Infot...	D00010	Alfred...	10-13...	11-14...		i	
			Alfred...	test	Infot...	D00010	Alfred...	11-13...	11-27...		i	
			Josep...	TEST	Acces...	D00010	Alfred...	11-13...	11-27...		i	

Total 6

2. Select **Submit** from the dropdown menu.

Deptid	Requester	Creation t	Start Date	End Date	Info	Action
330010	Alfred...	11-24-...	11-14-...	11-14-...	i	Submit Close Hold
330010	Alfred...	11-24-...	11-14-...	11-14-...	i	
330010	Alfred...	11-24-...	11-14-...	11-14-...	i	

3. Repeat the same procedure for the rest of the people in the list. You can see what rows need to be selected by reviewing the **Status** column. The ones that have not been submitted will say **New**.

ID	Person ID	Empid	Name	Job Title	Status	Deptid	Requester	Creation t	Start Date	End Date	Info	Action
683	683	93196...	Micha...	Test.f...	New	330010	Alfred...	11-24-...	11-14-...	11-14-...	i	Submit
682	682	20071...	Harol...	Test.f...	New	330010	Alfred...	11-24-...	11-14-...	11-14-...	i	Submit
681	681	01000...	Antho...	Test.f...	New	330010	Alfred...	11-24-...	11-14-...	11-14-...	i	Submit
341	321	01238...	Micha...	Test.f...		330010	Alfred...	10-13-...	11-14-...	11-14-...	i	
623	623	01244...	Alfred...	test	Info...	330010	Alfred...	11-13-...	11-27-...	11-27-...	i	
622	622	10001...	Josep...	TEST	Access...	330010	Alfred...	11-13-...	11-27-...	11-27-...	i	

1 rows selected Total 6

4. Click the **Bulk Process** button to submit all the selected requests.

My Requests

My Approvals Help

Optional Bulk Comments

Bulk Process Import

5. The **Status** of the selected requests will change to **Submitted**. The requests will now move through the normal approval workflow.

ID	Person ID	Empid	Name	Job Title	Status	Deptid	Requester	Creation t	Start Date	End Date	Info	Action
683	683	93196...	Micha...	Test.f...	Submitted	330010	Alfred...	11-24-...	11-14-...	11-14-...	i	
682	682	20071...	Harol...	Test.f...	Submitted	330010	Alfred...	11-24-...	11-14-...	11-14-...	i	
681	681	01000...	Antho...	Test.f...	Submitted	330010	Alfred...	11-24-...	11-14-...	11-14-...	i	
341	321	01238...	Micha...	Test.f...	Info...	330010	Alfred...	10-13-...	11-14-...	11-14-...	i	
623	623	01244...	Alfred...	test	Info...	330010	Alfred...	11-13-...	11-27-...	11-27-...	i	
622	622	10001...	Josep...	TEST	Access...	330010	Alfred...	11-13-...	11-27-...	11-27-...	i	

Total 6