

How-To: Batch Request Volunteers

1. Introduction

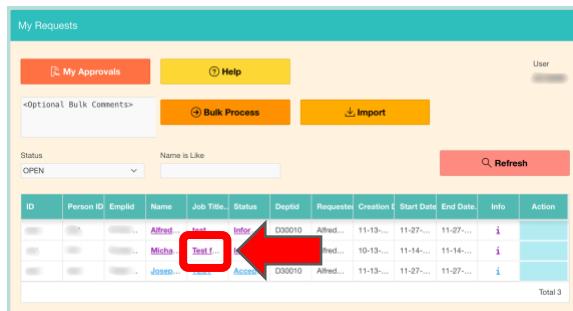
You can batch request several volunteers at a time. There are two options to do that: by copying the information of a volunteer that you have already requested or by uploading the information of several users before adding the details of the request.

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.

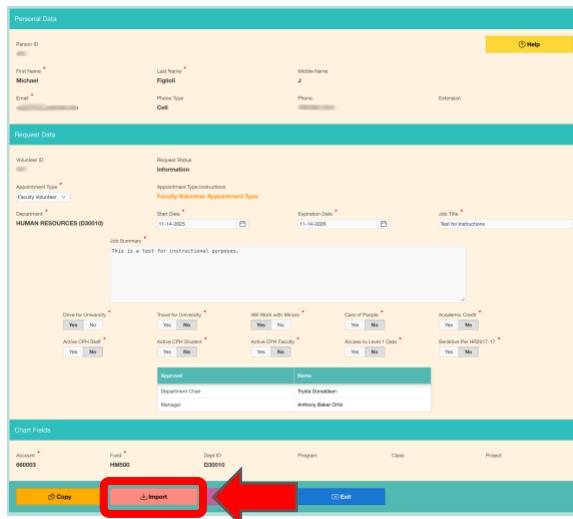
1. In the [Volunteer Requests – Request Approvals](#) page, click the **Job Title** of the user that you want to use as the original to make copies.



The screenshot shows the 'My Requests' page with a list of volunteers. The 'Job Title' link for the user 'Test f.' is highlighted with a red arrow.

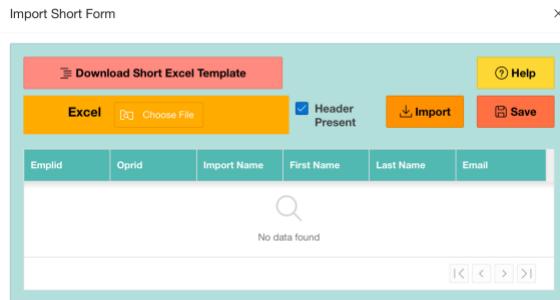
ID	Person ID	EmpID	Name	Job Title	Status	DeptID	Requester	Creation C	Start Date	End Date	Info	Action
...	Alfred	Info	OPEN	D00010	Alfred...	11-13...	11-27...	11-27...	i	
...	Micha	Test f.	OPEN	D00010	Micha...	10-13...	11-14...	11-14...	i	
...	Jesse	Access	OPEN	D00010	Alfred...	11-13...	11-27...	11-27...	i	

2. The [Request Maintenance](#) page will open displaying the user's information. Click the **Import** button.



The screenshot shows the 'Request Maintenance' page with various input fields for a volunteer request. The 'Import' button is highlighted with a red arrow at the bottom of the page.

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



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



5. 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.

Home	Insert	Draw	Page Layout	Formulas
Paste	Aptos Narrow (Bod... 11 A ¹ A ²			
	B I U			
A1	X ✓ f _x ✓	EMPLID		
1	EMPLID	NAME		
2				
3				
4				
5				

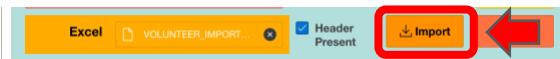
6. Fill out the Employee ID and Name for each of the new volunteers and save the file wherever you want in your computer. You can rename the file if you want.

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

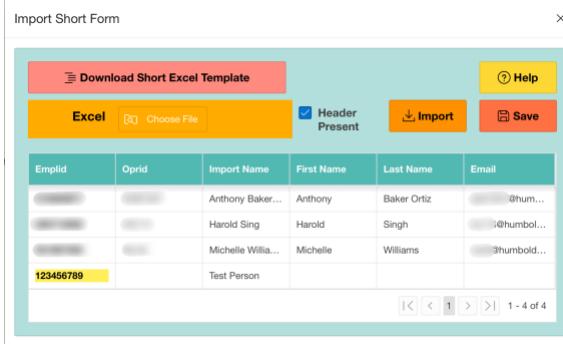
7. Click the **Choose File** button inside the Excel block of the Import Short Form pop-up window.



8. 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.



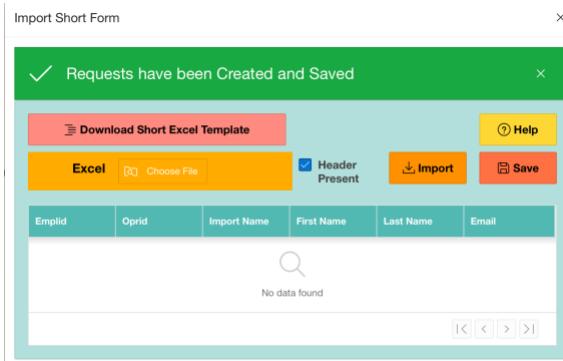
The screenshot shows the 'Import Short Form' window. At the top, there are buttons for 'Download Short Excel Template', 'Help', 'Excel' (selected), 'Choose File', 'Header Present' (checked), 'Import', and 'Save'. The main area is a table with columns: EmpId, Oprid, Import Name, First Name, Last Name, and Email. The table contains four rows of data. The fourth row, which has '123456789' in the EmpId column, is highlighted in yellow. The other rows show data for Anthony Baker, Harold Singh, and Michelle Williams. At the bottom, there are navigation buttons (|<|, <, >, >|) and a message '1 - 4 of 4'.

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 E	Start Date	End Date	Info	Action
...	Mike...	Test f...	New	D00010	Alfred...	11-24...	11-14...	11-14...	i	
...	Harold...	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	
...	Joseph...	TEST	Accept...	D00010	Alfred...	11-13...	11-27...	11-27...	i	

Total 6

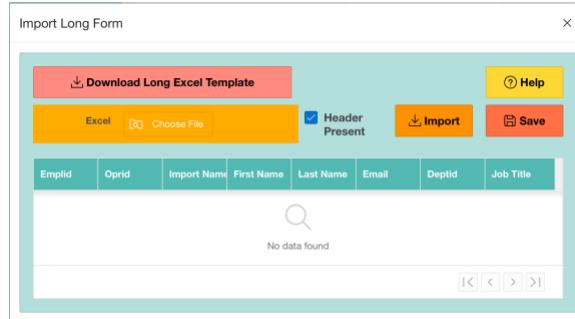
3. Import Multiple Users with Different Attributes

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.

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48	49	50	51	52	53	54	55	56	57	58	59	60	61	62	63	64	65	66	67	68	69	70	71	72	73	74	75	76	77	78	79	80	81	82	83	84	85	86	87	88	89	90	91	92	93	94	95	96	97	98	99	100
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48	49	50	51	52	53	54	55	56	57	58	59	60	61	62	63	64	65	66	67	68	69	70	71	72	73	74	75	76	77	78	79	80	81	82	83	84	85	86	87	88	89	90	91	92	93	94	95	96	97	98	99	100

The file contains the following columns:

- EMPLID
- NAME
- (FACULTY or STAFF) Volunteer
- DEPTID
- START DATE
- END DATE
- 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)

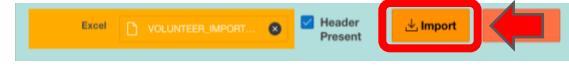
5. Fill out a row for each volunteer request as noted above and save the file wherever you want in your computer. You can rename the file if you want.

1	EMPLID	NAME	(FACULTY OR STAFF) Volunteer	DEPTID	START DATE	END DATE	JOB TITLE	10	JOB SUMMARY	11	12	13	14	15	16	17	18	19	20	21
2	Harold Sing	Harold	Sing	D40020	12/15/05	12/15/05	Test Faculty Volunteer	0	DEPT CHAIR (EMPLID)	MANAGER (EMPLID)	DRIVER (Y/N)	TRAVEL (Y/N)	PERSONS (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)
3	Michelle Williams	Michelle	Williams	D40020	12/15/05	12/15/05	Test Staff/Volunteer	0	This is a test	This is a test	Y	N	N	N	N	N	N	N	N	N

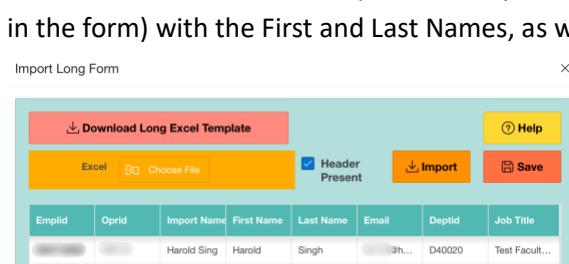
6. Click the **Choose File** button inside the Excel block of the **Import Long Form** pop-up window.



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

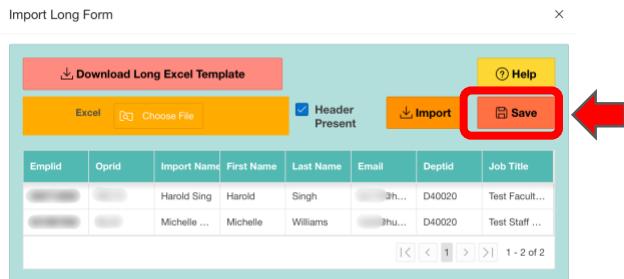


8. After a brief moment, the list of users will appear in the **Import Long Form** pop-up window displaying their basic information. Verify the identity of the user by matching the Import Name (which you typed in the form) with the First and Last Names, as well as the email.

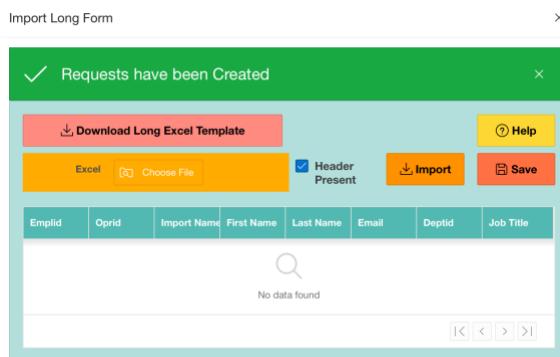


If there is an incorrect Employee ID or one that's not in PeopleSoft, it will be highlighted in yellow. You can close the window and fix the information, or you can leave it like that and it will be ignored.

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



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



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



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



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

ID	Person ID	Emplid	Name	Job Title	Status	DeptId	Requester	Creation C	Start Date	End Date	Info	Action
			Miche...	Test S...	New	D00200	Alfred...	11-24...	12-10...	12-10...	i	
			Harol...	Test F...	New	D00200	Alfred...	11-24...	12-10...	12-10...	i	
			Antho...	Test f...	New	D00100	Alfred...	11-24...	11-14...	11-14...	i	
			Harol...	Test f...	Submi...	D00100	Alfred...	11-24...	11-14...	11-14...	i	
			Miche...	Test f...	Submi...	D00100	Alfred...	11-24...	11-14...	11-14...	i	
			Micha...	Test f...	Info...	D00100	Alfred...	10-13...	11-14...	11-14...	i	
			Alfred...	test	Info...	D00100	Alfred...	11-13...	11-27...	11-27...	i	
			Josep...	TEST	Accept...	D00100	Alfred...	11-13...	11-27...	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	Emplid	Name	Job Title	Status	DeptId	Requester	Creation C	Start Date	End Date	Info	Action
			Miche...	Test S...	New	D00100	Alfred...	11-24...	11-14...	11-14...	i	
			Harol...	Test f...	New	D00100	Alfred...	11-24...	11-14...	11-14...	i	
			Antho...	Test f...	New	D00100	Alfred...	11-24...	11-14...	11-14...	i	
			Miche...	Test f...	Info...	D00100	Alfred...	10-13...	11-14...	11-14...	i	
			Alfred...	test	Info...	D00100	Alfred...	11-13...	11-27...	11-27...	i	
			Josep...	TEST	Accept...	D00100	Alfred...	11-13...	11-27...	11-27...	i	

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

Depid	Requested	Creation D	Start Date	End Date	Info	Action
030010	Alfred...	11-24-...	11-14-...	11-14-...		
030010	Alfred...	11-24-...	11-14-...	11-14-...		
030010	Alfred...	11-24-...	11-14-...	11-14-...		

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	Depid	Requested	Creation D	Start Date	End Date	Info	Action
683	683	03198...	Michael...	Test f...		030010	Alfred...	11-24-...	11-14-...	11-14-...		
682	682	20071...	Harold...	Test f...		030010	Alfred...	11-24-...	11-14-...	11-14-...		
681	681	01000...	Anthony...	Test f...		030010	Alfred...	11-24-...	11-14-...	11-14-...		
341	321	01238...	Michael...	Test f...		030010	Alfred...	10-13-...	11-14-...	11-14-...		
623	623	01244...	Alfred...	test		030010	Alfred...	11-13-...	11-27-...	11-27-...		
622	622	10001...	Joseph...	TEST		030010	Alfred...	11-13-...	11-27-...	11-27-...		

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



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	Depid	Requested	Creation D	Start Date	End Date	Info	Action	
...	Michael...	Test f...	030010	Submitted	Alfred...	11-24-...	11-14-...	11-14-...		
...	Harold...	Test f...	030010	Submitted	Alfred...	11-24-...	11-14-...	11-14-...		
...	Anthony...	Test f...	030010	Submitted	Alfred...	11-24-...	11-14-...	11-14-...		
...	Michael...	Test f...	030010	Submitted	Alfred...	10-13-...	11-14-...	11-14-...		
...	Alfred...	test	030010	Submitted	Alfred...	11-13-...	11-27-...	11-27-...		
...	Joseph...	TEST	030010	Submitted	Alfred...	11-13-...	11-27-...	11-27-...		